



ERP Assessment & Optimization

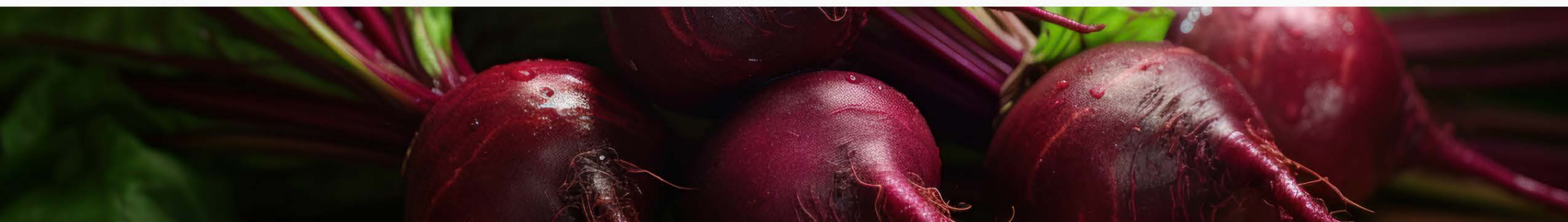
Leading Health Supplement Company

Executive Summary

A well-established health supplement company focused on science-based formulations for heart, brain, and joint health was seeking to optimize its existing ERP platform. Operating within a complex technology landscape that included eCommerce, integration middleware, a data warehouse, analytics, and 3PL providers, the company recognized the need to improve system performance, data quality, and decision-making capabilities. RPSI was engaged to lead a structured ERP optimization initiative focused on operational efficiency and data confidence.

Engagement Context

The company had scaled quickly, but ERP performance, data inconsistencies, and integration inefficiencies were constraining operational growth. Much of the system knowledge was siloed, and reporting lacked reliability. Leadership prioritized optimizing NetSuite to support smoother day-to-day execution, enable real-time data, and reduce reliance on workarounds.



Challenges & Solutions

Foundational Architecture Optimization

- 🔴 **Challenge:** The initial ERP setup lacked the architectural structure needed to support automated workflows, robust reporting, and accurate GL impact. Business processes were not designed with scalability or multidimensional reporting in mind. Additionally, legacy implementations relied heavily on custom solutions, which introduced risk and complexity.
- 🔴 **Solution:** Identified, prioritized, and managed foundational architecture improvement projects focused on automation, reporting flexibility, and general ledger. In several cases, we replaced overly customized components with NetSuite's native capabilities to ensure better performance, maintainability, and scalability. Enhancements included segment tagging, workflow realignment, and improved data capture.
- 🔴 **Outcome:** Increased automation, more reliable financial reporting, and better operational visibility through enriched reporting dimensions, accurate GL posting logic, and reduced reliance on custom code.

Lack of Industry and Business Expertise from Implementation Vendor

- 🔴 **Challenge:** The original implementation partner lacked subject matter expertise in the client's industry and did not fully understand the complexity of its business operations. This led to misaligned configurations, inefficient workflows, and limited scalability.
- 🔴 **Solution:** Reassessed key design decisions and engaged domain-specific experts to address gaps in process understanding, data flow, and reporting requirements.
- 🔴 **Outcome:** Streamlined business processes, better alignment with operational needs, and improved scalability through industry-leading ERP practices.

Data Integrity & Quality

- 🔴 **Challenge:** Inconsistent data structures across ERP, eCommerce, and Data warehouse caused reporting discrepancies.
- 🔴 **Solution:** Led data cleansing and standardization efforts prior to migration.
- 🔴 **Outcome:** Improved confidence in Snowflake and Tableau-based reporting.



Integration Performance & Reporting Attribution

- 🔴 **Challenge:** Middleware performance issues were delaying data synchronization between ERP, eCommerce, and 3PLs. At the same time, reports were unreliable due to fragmented attribution data and inconsistent tagging.
- 🔴 **Solution:** Reviewed and optimized integration flows for scalability and consistency. Standardized ERP as the system of record and implemented consistent tagging across platforms.
- 🔴 **Outcome:** Accurate reporting by promotion, campaign, and product segment.

Our Role | Advisor, Program Management, Project Management

RPSI served as a **strategic advisor**, leading the ERP assessment, optimization, and enabling cross-functional alignment. We:



- Facilitated workshops across finance, operations, supply chain, and IT.
- Defined and prioritized optimization backlogs across workstreams.
- Audited and standardized data across ERP, eCommerce, and Data Warehouse.
- Refactored automations to align with ERP best practices.
- Improved integration performance and documentation across platforms.
- Introduced governance and accountability across internal and external teams.

Results Achieved

- Enhanced ERP performance and order processing speed.
- Strengthened data quality and trust in reporting platforms.
- Reduced sync delays across ERP, eCommerce, and WMS/3PL systems.
- Standardized reporting attribution for improved business visibility.
- Established protocols for managing enhancements and vendor accountability.

Lesson Learned

- Cost savings do not always equate to quality delivery—strategic investment in the right expertise pays dividends.
- Partnering with a specialized SME boutique firm enabled successful execution of all optimization projects.
- Early alignment on business requirements is critical to system optimization.
- Clean, consistent data is essential across integrated platforms.
- Favor standard configurations over excessive customizations.
- Governance ensures sustained momentum and controls evolving project scope.





Client Testimonials

"Yaffa came to us highly recommended when we reached out to industry experts asking for a "Ninja" to help us optimize and overcome some challenges with our Netsuite implementation. Yaffa was able to rapidly assess the situation and build a plan to optimize our environment. She focused in on the core underlying root causes to challenges we were having and recommended solutions to address these areas. Yaffa masterfully navigated the many different points of view and input of business stakeholders to help us both build a prioritized project plan and put in place the right resources to execute that plan. Yaffa has become a trusted partner of ours and highly respected at HumanN. She is thorough, dependable, honest, and a master of her craft."

Senior Marketing Technology Leader & Consultant

"Yaffa is truly a 'fixer', she has the commanding personality and presence needed to accomplish the hard tasks. She helped us through some very hard times and produced amazing results. She is genuine and has both personal and professional integrity. Any company lucky enough to have her on their side will gain great benefit and value. She has my highest endorsement and respect."

Senior IT Leader

RPSI Global | Learn. Navigate. Transform

