



GSI Help Adds Up for Accounting Firm Seeking to make NetSuite a High-Value Asset



Grobstein Teeple, LLP is optimizing its investment in NetSuite by working with GSI to get the most out of the #1 ERP: streamlining workflows, automating invoicing processes, and managing its partners' activities.

As a multifaceted public accounting and consulting firm, Los Angeles-based Grobstein Teeple, LLP (GT) has worked with clients on insolvency and restructuring, cybersecurity, forensic technology, fraud investigation, litigation support, receiverships, business management, and back-office accounting.

Founded in 2013 as a boutique accounting consulting firm, GT has grown to become a full-service public accounting firm with offices in California, Nevada, and Washington D.C.

The firm's strength lies in its ability to tackle complicated financial issues while offering the high-level technical capabilities and thoughtful approaches its clients demand. GT prides itself on possessing the same skill sets and capabilities as larger accounting firms, but with greater flexibility, superior client care, better efficiency, and lower costs.

Better Time Tracking Needed

As its business grew, GT searched for an enterprise resource planning (ERP) platform to help streamline its workflows and processes for time tracking, client invoice customization, automation, and systems integration. It was using Bill4Time to manage the time and billing for both its general clientele and its bankruptcy practice—the latter of which requires a completely different invoicing strategy.

"Our previous implementation team included good programmers, but there may have been a loss of understanding around general accounting and billing practices."

- Dehlia Adams, Chief Operating Officer



Company Snapshot

Company: Grobstein Teeple, LLP

Location: Woodland Hills, CA

Industry: Accounting

Employees: 38

Solution: GSI SuiteCare

“The bill rate is different for the bankruptcy work, and those projects can remain works-in-progress (WIP) for years until the courts say, ‘you can charge it now’ or ‘we’re going to close that case,’” explained Dehlia Adams, Chief Operating Officer. “Then the invoice usually has to be edited or adjusted before it’s sent.”

This and other nuances were creating challenges for GT, which also needed a system for its general business processes and insight into the health of the organization. “The need to automate our time tracking and monthly billing process were the key drivers,” said Adams.

A Quick Pivot

After selecting NetSuite for its new ERP, GT began working with the ERP provider’s implementation team to get the new platform installed and running. Realizing quickly that a different approach was needed, it brought GSI, Inc., onboard as an implementation partner. Adams said GSI’s strong financial background was a key factor in its decision.

“Our previous implementation team included good programmers, but there may have been a loss of understanding around general accounting and billing practices,” Adams explained. “As a result, we wound up having to plug a lot of ‘holes’ in the system; the cost and customizations just blew up.”

Knowing that GT had already invested much time, effort and money into its NetSuite implementation, GSI took over the reins, identified the problems with the initial project, and then suggested meaningful improvements that had not been previously

considered. For example, the company needed a way to track WIP invoices and bill for them even if a project wasn’t yet finalized or if a partner wasn’t ready to bill for a specific portion of that project.

“That time goes back into WIP and never shows up again in the billing cycle, leaving a pretty big hole as it sits out there unbilled,” said Adams, whose team used different trial-and-error approaches to fix this problem. “GSI worked with us to develop reporting that helps us identify and address these issues that might be lingering in our system.”

More to Come

In place for about two years, NetSuite is now coming into its own at GT thanks to GSI’s SuiteCare offering. GSI’s SuiteCare is a comprehensive support offering that delivers a guided transformation of the customer’s use of NetSuite, and covers all configuration, native functionality, customization, add-on modules, integration and full-cycle development. This unique offering has included building meaningful management reports; implementing key performance indicator (KPI) data that tracks the public accounting firm’s overall health; and providing a 360-degree view into departmental and partner activities.



“We didn’t have that level of reporting before,” said Adams. “We had a lot of data, but it wasn’t defined in a way that was meaningful or reported in a way that was meaningful to the partner groups.”

For now, GT is using NetSuite as a time and billing solution but plans to use it more broadly for automation and workflow management in the near future. For example, it plans to move client and vendor data currently stored on spreadsheets—and entered manually into NetSuite—right into its ERP for easier data management.

“We’re still handling a lot of activities outside of NetSuite,” said Adams, who points to NetSuite’s Resource Allocation and CRM modules as potential add-ons in the future. “With GSI’s support, we’re looking at the larger solution and how we can use the tool better. We will be using GSI to a great degree to fulfill the needs of what NetSuite can do for us.”



“With GSI’s support, we’re looking at the larger solution and how we can use the tool better. We will be using GSI to a great degree to fulfill the needs of what NetSuite can do for us..”

- Dehlia Adams, Chief Operating Officer

Why GSI?

REASON NO. 5

Get greater efficiency in your business

- ✓ Streamlined processes with clear visibility
- ✓ Time savings on information sharing
- ✓ Focus on the issues that really drive your business