Case Study: Garven and Cadence

Gift packaging leader gains insight by bolstering existing NetSuite system

"It's more than just the understanding of NetSuite. With many companies, the focus can be on just understanding the product and less about the customer's business model or what they need to get out of NetSuite. I think that is a key differentiator for McGladrey; they understand our business needs and motivations, and can meld those two things together. Working with McGladrey was a critical step in moving us forward with NetSuite."

*- Sera Holt,
Senior Vice President,
Garven LLC and Cadence
Packaging Group*

Overview

Garven LLC/Cadence Packaging Group designs and distributes high-quality paper gift packaging products as well as luxury retail carry-out packaging to a network of retailers nationwide. Since the company was founded in 1988, its product line has expanded to include gift bags and gift wrap, along with tissue paper, partyware, stationery and additional social expression products. Garven and Cadence is dedicated to leveraging innovation to enhance process management and manufacturing to ensure maximum efficiency at a competitive cost.

Background

Garven and Cadence went live with NetSuite in August 2012, but desired further platform optimization to meet the growing company's needs. As Garven's and Cadence's multisubsidiary structure expanded, the company also sought greater insight into its evolving business processes, as well as additional customer relationship management (CRM) capabilities.

Garven and Cadence had difficulty splitting data out by location and publishing reports for individual employees, as some employees work for both company divisions, while others work for only one. The company also faced challenges when looking at open sales orders, purchase orders and inventory; users had to change or modify searches and reports when adding a location.

To better manage the transaction processing of both companies with one ERP, the company focused on the potential of NetSuite's OneWorld application. Their original implementation firm determined OneWorld was not necessary, but with increased sales and expected growth, Garven and Cadence felt the additional functionality was needed.

In addition, the company did not have a CRM function, as employees used various inconsistent models to track customer information. After learning about the potential CRM capabilities within NetSuite and the ability to manage that additional data within a singular solution, Garven sought to integrate that functionality.

Project

Garven and Cadence initially engaged McGladrey for a scripting project to optimize its NetSuite solution, based on the firm's reputation for successful NetSuite projects. The McGladrey team worked with Garven and Cadence to enhance scripting and develop custom fields, laying the groundwork for a successful long-term relationship.

"When the McGladrey team first came to our offices to sit down with us and talk about where we were, where we wanted to go and what our challenges were, it became very apparent that it was a higher class organization," said Garven and Cadence Senior Vice President Sera Holt. "The team had several solutions and provided numerous insights and options to give us some ideas. When they came out so prepared, and we had constructive conversations, it was a defining moment."

Garven and Cadence seamlessly transitioned to a multisubsidiary environment with data from both divisions in lieu of utilizing location fields. In addition to some reporting enhancements, OneWorld helped Garven and Cadence clearly define the data for individual employees based on their work roles.

"McGladrey has a higher caliber of individuals compared to other firms, with their ability to really discover what our problems are and present solutions," commented Holt. "They are very thorough, and from an operations perspective, that is critical."

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Following the success of the OneWorld integration, Garven and Cadence also turned to McGladrey to implement NetSuite CRM to provide more insight into customer data. The McGladrey team developed an implementation strategy based on Garven's and Cadence's unique needs and timeline. Following the project, customer information is now in one centralized, cloud-based location.

"McGladrey has been very resourceful and very responsive," said Garven and Cadence Corporate Controller Darlene Peterson. "They are willing to help us find whatever solution we need and give us multiple avenues to get there."

McGladrey also developed additional functionality through forms and fields to differentiate Garven and Cadence's brand identity to customers and vendors. The team looked at system scripting holistically to clean up existing scripts and add new scripts to avoid conflicts and increase efficiency. The additional customization helped ensure that NetSuite was the best solution for the company's current and future ERP needs.

With McGladrey's help, Garven and Cadence continues to leverage the functionality of NetSuite in additional areas of the business. The company develops key performance indicators to utilize the additional data they have collected within the system. Garven and Cadence also creates metrics that managers can utilize within their departments as well as a pricing model to track and analyze material quotes from factories.

In addition, the company is evaluating expanded expense reporting options within NetSuite. Garven and Cadence is also introducing deeper human resources capabilities, developing the employee center to establish it as a one-stop resource for employees and staff.

Outcomes

McGladrey has become a valuable resource for Garven and Cadence to optimize and enhance the company's NetSuite application. Following a successful initial project to strengthen scripting and implement custom fields, a long-term relationship has developed with several successful projects. McGladrey has helped Garven and Cadence expand NetSuite functionality across the company, bolstering CRM capabilities

and multilocation reporting, with additional development planned for the future.

"The McGladrey team is a cut above other providers," said Holt. "The interaction with McGladrey was top notch. They are very good listeners, have strong attention to detail, and a willingness to come to our site and have a meaningful dialogue to understand what we need."

Other benefits of McGladrey's service to Garven and Cadence include:

- Increased insight into customer data
- Unified customer information and elimination of several disconnected data collection systems
- Greater reporting capabilities for multiple subsidiaries and individual employees
- Consolidated data for customers, employees and vendors in one streamlined solution
- Key system customizations to align the NetSuite platform to the company's business processes and goals

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