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M&A Integration: A 100-Day NetSuite Financial Systems Plan

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Executive Summary

Mergers and acquisitions (M&A) continue to be a dominant strategy for growth, but research consistently shows that **approximately 70–90% of deals underperform or fail to achieve stated objectives** (dealstream.com) (imaa-institute.org). A major reason is poor post-deal integration, especially of finance and accounting systems. Within this critical integration phase, the **first 100 days** after closing are widely viewed as decisive for setting the merged company on the right path (www.fm-magazine.com) (www.fm-magazine.com). This playbook lays out an evidence-based, 100-day plan specifically for *financial systems consolidation* within NetSuite – one of the leading cloud ERP platforms. It synthesizes best practices, research findings, and case examples to guide finance and IT leaders (particularly CFOs) through the complex tasks of unifying ledgers, systems, and processes after an acquisition.

We begin with **historical context**: the high rates of post-merger failure and the growing consensus that rapid, well-orchestrated integration is key to success (www.fm-magazine.com) (www.netsuite.com). We then review the **“100-Day Plan” construct**, noting both its popularity as a planning framework and critiques (some studies suggest that volume of early change alone does not guarantee success (www.researchgate.net) (www.researchgate.net)). Next, we detail the **challenges of financial consolidation** in M&A – from disparate chart of accounts and accounting standards (e.g. **US GAAP vs IFRS**) to data mismatch and organizational issues (mondialsoftware.com) (mondialsoftware.com). With this foundation, we introduce **NetSuite’s capabilities**: its OneWorld and Multi-Book modules that enable **multi-entity consolidation**, multi-currency reporting, and compliance automation (www.netsuite.com) (www.netsuite.com). We discuss **how to use**

NetSuite in an integration, highlighting its real-time consolidation, automation (e.g. elimination entries, consolidated P&L/Balance Sheets), and guided implementation methodology (SuiteSuccess) (www.netsuite.com) (www.netsuite.com).

The heart of the report is a **detailed 100-day integration checklist**. We break the period into phases (pre-close alignment, Day-1 readiness, Weeks 1–4, 5–8, etc.) and enumerate critical finance-oriented tasks: establishing the integration management office, aligning fiscal calendars, harmonizing the chart of accounts, **migrating master data**, setting up **intercompany and elimination accounts**, rationalizing systems, and finalizing the consolidated chart of accounts and reporting structure. Throughout, the CFO's role as integration leader is emphasized – consistent with research showing that when CFOs lead integration (rather than delegating it), cost and revenue synergies are far more likely to be realized (www.mckinsey.com) (www.mckinsey.com). We also stress **organization and communication**: retaining key staff, unifying processes, and keeping stakeholders (employees, regulators, investors) informed.

We draw on **multiple perspectives**: academic studies, industry surveys, interviews, and case examples. For instance, a NetSuite case study of Quatris Healthco (the merger of two subsidiaries) showed how moving both companies onto one NetSuite instance within six months yielded a “single view” of financials and streamlined receivables, payables, and reporting (www.netsuite.com). A Bridgepoint Consulting case study describes a tech client that **switched from QuickBooks to NetSuite** post-acquisition; once implemented, the PE-backed company could deliver consolidated financials directly from NetSuite instead of Excel, greatly easing future deals (bridgepointconsulting.com). In a separate example, a European healthcare software group migrated all subsidiaries onto NetSuite to eliminate disparate ERPs, reducing reporting delays and fragmentation (www.linkedin.com). These and other examples illustrate benefits (faster closes, real-time visibility) as well as pitfalls (underestimating data cleanup, overreliance on spreadsheets (greenstep.com)).

We conclude with **implications and an action plan**: a rich set of recommendations on governance, technology, and timelines. We emphasize investment in a robust integration architecture (including data mapping and middleware) (datacalculus.com), the use of NetSuite's built-in consolidation features (www.netsuite.com), and continuous measurement of integration KPIs (e.g. cost-synergy realization) when possible. Future trends are briefly noted – from multi-ledger (Multi-Book) accounting for global compliance, to advanced analytics and AI potentially accelerating consolidation. In sum, **this report equips finance executives with a systematic, evidence-backed 100-day playbook** for merging financial systems under NetSuite, balancing urgency with rigor.

Introduction and Background

Mergers and acquisitions remain a central growth strategy yet are fraught with risk. A wealth of historical data underscores the challenge: a **McKinsey survey of global CFOs** found that roughly *70% of mergers fail* to meet expectations (imaa-institute.org). Commonly cited studies put the failure rate even higher (70–90%) (dealstream.com) (www.netsuite.com). Failures often stem not from overaggressive deal pricing but from **post-merger integration problems**. In fact, NetSuite and consulting sources note that “*operational integration – and more specifically, the inability to unify technology systems*” is a leading cause of deal breakdown (www.netsuite.com). Likewise, a primary McKinsey finding is that companies whose CFOs “*are very involved*”

in integration are **much more likely to hit synergy targets** (www.mckinsey.com). These observations highlight two themes: (1) integration planning and execution must commence early and intensively post-close, and (2) the finance function is on the critical path.

M&A Today: Complexity and Scale

Recent deal volumes remain substantial. For example, in 2021 there were nearly 7,900 U.S. M&A transactions worth about **\$2.6 trillion**, according to NetSuite's analysis (www.netsuite.com). Even amidst economic headwinds in 2022–2024 (inflation, interest rates, regulatory scrutiny), global dealmaking is projected to remain robust, albeit with more caution (www.netsuite.com) **[118]**. Companies undertaking M&A today are typically larger and more complex than mid-size firms of the past. Many have global footprints, dozens of subsidiaries, and operations spanning multiple ERP and financial reporting environments. This complexity magnifies integration challenges.

Consider a mid-market example: an acquiring company that itself spans multiple countries may have a NetSuite OneWorld account with multi-currency and multi-book consolidations, while its target (perhaps a regional subsidiary) might run a legacy ERP or even spreadsheets. Aligning these worlds requires careful planning. Furthermore, the trend toward cross-border deals adds layers of accounting complexity (e.g. harmonizing US GAAP and IFRS treatments, local tax codes, and currency translation rules). In one KPMG study, a U.S. GAAP company acquired by an IFRS-reporting parent successfully **completed a full GAAP-to-IFRS conversion in “a matter of months,”** aligning its reporting processes to the new group (kpmg.com). That swift alignment was exceptional and required intensive coordination; most firms face a steeper climb.

Against this backdrop, savvy acquirers now recognize **technology integration** as strategically indispensable. A recent NetSuite-whitepaper noted, *“Organizations that are being acquired tend to be underinvested in technology... handling a lot of processes manually that could be automated”* (www.netsuite.com). In many deals today, heterogenous IT landscapes – different ERPs, CFO systems, CRMs, etc. – are the main source of friction. Maximizing the value of a deal often hinges on establishing a unified back-office. Hence, an explicit goal of many M&A playbooks is to consolidate systems wherever possible, rather than maintaining expensive multiple ledgers and legacy systems. As one industry analyst put it, *“Few closely held companies have the systems in place to make deals happen smoothly... and then support the acquiring company's strategy going forward.”* (www.netsuite.com)

The 100-Day Integration Premise

With success rates so low, attention in practice has turned to rapid integration. The motto of *“act decisively in the first 100 days”* has become ingrained, even if it originated as much from folklore as scientific evidence (www.researchgate.net). The assumption is that early momentum is critical – for example, employees are only welcoming of change for a limited window, customers will test the new entity quickly, and market expectations must be managed. The Financial Management magazine emphasizes that *“the first 100 days is crucial to jump-starting a successful merger,”* providing the initial impetus to align teams and deliver early results (www.fm-magazine.com). The analogy given is painting a new house *before* moving furniture; if you wait too

long to lay the groundwork, *“the opportunity vanishes, like water evaporating on a sweltering day.”* (www.fm-magazine.com). Studies by integration consultants also note that without a 100-day plan, *“it’s basically a false start,”* jeopardizing synergy capture and causing employee confusion (www.fm-magazine.com).

However, academics caution that the 100-day figure should not be seen as magic. Duncan Angwin’s influential study on integration speed concluded that there is **“little overall support”** for first-100-day activity by itself being a strong predictor of long-term success (www.researchgate.net) (www.researchgate.net). His cross-sectional research found that while high levels of early change are theoretically linked to perceived success, this correlation was only statistically significant in older acquisitions (3+ years out), hinting at retrospective bias (www.researchgate.net) (www.researchgate.net). In other words, what seems like a correlation may in part be leaders over-reporting early activity after the fact. That said, Angwin does not dispute that planning around the 100-day milestone helps form a focused integration roadmap. He points out that in practice, the first few months are indeed when “all the critical actions should be launched” before teams lose momentum or enthusiasm (www.researchgate.net).

For practitioners, the lesson is clear: the 100-day plan is a **structuring device** – not a guarantee of success, but a mechanism to ensure disciplined action. The integration playbook should use this period to execute top priorities while laying the foundation for longer-term initiatives. As Christophe Van Gampelaere of Global PMI Partners warns, without a detailed first-100-day plan, *“expected synergies may not be reached, revenues and profitability may slide, and those crucial employees may exit.”* (www.fm-magazine.com). In sum, the urgency of acting quickly should be balanced with thoroughness; the value lies in the plan’s *quality* and *execution*, not merely its span. This report therefore proposes a **phased 100-day timeline** with recommended tasks, underpinned by NetSuite’s capabilities.

The Role of Finance and the CFO in Integration

Integration is inherently cross-functional, but the finance function sits at its nexus. The CFO uniquely sees the consolidation of financial metrics, the harmonization of reporting, and the structuring of the combined organization’s capital, so their active leadership is vital. McKinsey’s survey of 200+ CFOs found that **finance chiefs who led synergy capture and transformation agendas significantly improved deal outcomes** (www.mckinsey.com). When CFOs took a hands-on approach to integration, their companies were “much more likely” to achieve cost and revenue synergies on or above plan (www.mckinsey.com). In the deal examples we review, CFOs are often seen not just as number-crunchers but as integration executives, interpreting friction points and keeping stakeholders satisfied (insightfulcfo.blog).

Concretely, within the first 100 days CFOs will oversee an **“integration management office” (IMO)** or similar team that marshals the effort. This includes crafting the integration strategy, tracking synergy targets, and ensuring that opportunities identified in due diligence are actually realized. The CFO must also manage the **financial close and reporting process**, which is both a critical synch point and a common pain during M&A. Often each company closes books on its own schedule; aligning the two sequences (and systems) quickly is a top priority. A NetSuite blog notes that targets often **struggle to accurately measure and report on financial performance** post-merger when data remains fragmented, affecting investor relations (www.netsuite.com). By

contrast, a unified ledger allows timely investor reporting – indeed, one NetSuite customer even wished their tech stack could be shown as an intangible asset on the balance sheet due to the value it created (www.netsuite.com).

Financial oversight also means addressing **compliance and risk**: audit requirements, internal controls, tax compliance, and regulatory reporting (which could include integration reporting to authorities). The CFO must ensure that the chosen approach to consolidation meets all these requirements. NetSuite's marketing materials emphasize that its consolidation tools can *"ensure compliance with relevant accounting standards, tax codes and regulations — wherever you operate"* (www.netsuite.com). In practice, this might involve setting up parallel accounting books (GAAP and IFRS) to satisfy global stakeholders. For example, in an IFRS/GAAP M&A scenario KPMG advises establishing dual books or firm transition plans to align policies (kpmg.com). NetSuite's **Multi-Book Accounting** feature is designed for exactly this task: it lets companies maintain multiple ledgers (e.g. IFRS, GAAP, local statutory) from a single transactional entry base.

Beyond systems, the CFO's remit includes **people and culture**. Research indicates that failing to address the **"people side"** costs dearly in integrations. Edgar Schein and others have long warned of cultural collisions. Modern thought echoes this: CFOs today are urged to work closely with HR and business leaders on change management. One CFO-oriented guide suggests *"addressing cultural differences, conducting cultural assessments, facilitating open communication, and providing training and support"* (www.fdcapital.co.uk). In other words, even while chasing numbers, finance leaders should never neglect explaining the *why* of the merger to their own accounting and control teams (and vice versa for merged-company employees). NetSuite's integration benefits extend here too: when both acquirer and target use the same system (as in the Quatris example), **everyone literally sees the same data and processes** (www.netsuite.com), which can simplify cultural alignment by reducing mistrust.

Finally, CFOs must maintain business-as-usual through integration. Customers cannot notice disruptions in billing or service, and employees should get paid without glitches. That means ensuring payroll and vendor payments continue seamlessly – a nontrivial challenge if one company's HR/Payroll system differs from the other's. If possible, the prefatory months should involve **parallel testing** of financial processes in the new system. Bridgepoint's tech client case underlines this point: during their NetSuite implementation spanning three acquisitions, they **hit the January 1 deadline** for going live, allowing that client to retire spreadsheet consolidation and instead output **consolidated statements from NetSuite itself** (bridgepointconsulting.com). Streamlining the closing process and eliminating manual reconciliations (previously done in Excel) is precisely the kind of integration outcome that the CFO should insist on.

The First 100 Days: Phases and Priorities

A structured approach is essential. We break the 100 days into logical phases, while acknowledging that in reality overlap and iteration are common. Table 1 (below) summarizes a **proposed phase breakdown**, which is elaborated in the text that follows:

Phase	Timing	Key Objectives	CFO/Finance Focus	NetSuite/System Focus
Pre-Close Planning	Pre-close	Prepare integration strategy; establish governance (IMO); cultural/communications planning	Identify critical accounts; construct unified COA framework; draft post-close master schedule	Audit existing systems; plan NetSuite instance design; map data fields & GL accounts
Day 1 Execution	Day 1	Implement immediate day-1 tasks; official communication to stakeholders	Ensure payroll issuance for merged entity; announce org structure; align opening balances	Flip switch on consolidated books; verify Core GL and customer/vendor data; enable NetSuite intercompany preferences
Weeks 1–4	Days 2–30	Transition core finance operations; integrate reporting, begin consolidation	Complete chart of accounts harmonization; set up combined general ledger; start consolidated P&L reporting by calculator or soft close	Load baseline data (customers, vendors, inventory); configure subsidiary structure in NetSuite; begin training users on unified workflows
Weeks 5–8	Days 31–60	Execute deep cuts: systems retirement, process standardization, currency translation	Eliminate redundant processes; standardize accounting policies; intercompany eliminations; finalize consolidation currency treatment	Go-live advanced consolidations (elimination journals, currency revaluation); implement NetSuite Multi-Book (if needed); run test consolidated close
Weeks 9–12	Days 61–90	Refine, stabilize, and optimize; measure early KPIs, finalize synergies	Reconcile final closing, analyze variance vs synergy targets; embed keyed reports; hand over to ongoing finance operations	Automate recurring consolidations; set up consolidated financial reports and dashboards; integrate any remaining bolt-on modules
Days 91–100	Days 91–100	Wrap up one-time tasks; transition to continuous management	Final mastery of consolidated spreadsheets/processes; prepare for first official combined audit; document lessons learned	Archive legacy systems; solidify NetSuite roles/security; ensure all data is live and “same” across system (customer master, vendor terms, etc.)

Table 1: Suggested 100-Day Integration Phases – Example tasks by category.

Pre-Close Planning: Even before the deal closes (“Day 0”), certain groundwork should be laid. Senior finance and IT leaders form the alignment committee (often called the Integration Management Office) to draft the integration blueprint. The CFO should work with accounting teams from both companies to **outline the unified chart of accounts (COA)** and chart hierarchies (mondialsoftware.com). Discussions at this stage include decisions on the consolidation currency, subsidiaries to be combined, and which financial practices (e.g. revenue recognition) to preserve. Pre-closing, it is also wise to inventory systems and password processes. NetSuite partners often advise that any data cleanup (e.g. duplicate customers/vendors) or policy alignment that can be done ahead of cut-over will pay off. Some organizations even do a “Day -30 dry run” of the consolidated monthly close, to identify gaps.

Day 1 Execution: Day 1 (the day the deal legally closes) is **all about continuity**. As FM Magazine warns, executives often “*focus so intently on deal negotiations that they overlook what comes next*”, forgetting to handle urgent day-1 tasks like commuting payroll, activating systems, or internal announcements (www.fm-magazine.com). Instead, we anticipate these needs in advance. On Day 1, accounts payable/receivable

should roll into the combined company without missing a cycle. The CFO will ensure all banks and cash accounts of the target are correctly merged or mapped (critical for cash-flow continuity). If NetSuite is the new standard system, Day 1 may involve “lighting up” the consolidated NetSuite account: enabling subsidiaries in OneWorld, configuring intercompany preferences, and verifying that opening balances from each entity are properly interlinked with elimination accounts. Communications to employees, customers, and suppliers also occur: ideally with a pre-agreed “Day 1 memo” explaining immediate changes (even if “nothing yet has changed day-to-day”).

Weeks 1–4 (Month 1): Core Integration: This phase typically addresses the “low-hanging fruit.” The finance team focuses on aligning **core accounting processes**. For example, they might merge the two companies’ general ledger structures: deciding which charts map into which, and inserting dummy accounts if needed to reconcile any mismatches. Many organizations set a **rolling forecast** during this month so that an integrated P&L can be produced by month-end. If the target was on QuickBooks or Sage, the transition team should already be at work exporting/master customer-vendor data to NetSuite or vice versa. In NetSuite OneWorld, each legal entity (subsidiary) is typically represented in the same account, so by Day 30 one would have entered all subsidiary data and be ready to post intercompany transactions. It is common at this stage to publish the first “test” consolidated financials (perhaps pro forma for half the month) to validate the new processes and show that the acquisition finances are visible at the parent level (www.netsuite.com).

Weeks 5–8 (Month 2): Systems and Policy Rationalization: With core data live, focus turns to deeper cuts. The merged company may have had multiple ERP modules: e.g. two inventory systems, two payroll systems, etc. By this stage it should be clear which system is flagship. Non-NetSuite financial modules (if any remain) should be read-only or shuttered. Key policies are harmonized in detail – for example, if one legacy company recognized revenue on shipment and the other on invoicing, a decision (and systems change) is locked in. Currency issues are resolved – for international operations, NetSuite’s currency translation engine (using closing and average rates) is set up so that foreign grosses roll up correctly. Intercompany eliminations (sales from Entity A to Entity B, etc.) are configured; NetSuite’s Intercompany Journal feature or Multi-Subsidiary Accounting subsystem is used to automate elimination entries (mondialsoftware.com). The CFO will audit these first elimination runs closely to ensure the consolidated trial balance reconciles. By the end of month 2, the goal is to run a **complete consolidated close** cycle and compare it against expectations, adjusting entries as needed.

Weeks 9–12 (Month 3): Stabilize and Report: In the final stretch, most transitions should be complete, shifting attention to efficiency and reporting polish. Any remaining spreadsheets used for shutdown integration (e.g. for goodwill or carve-out finances) are converted into NetSuite reports. Recurring consolidation tasks are automated: for instance, dashboard KPIs are built in NetSuite’s reporting tools, and any necessary custom saved searches are deployed. Departments outside finance (like Procurement or Sales) are fully on board with the new unified workflow. The CFO and team should prepare for the first official combined statutory close: having everything tested means auditors and regulators see one coherent set of accounts. Meanwhile, integration metrics are reviewed: did we achieve cost savings by retiring one accounting team? Are we hitting the projected headcount reductions in finance? Early analysis starts the culture of accountability being “*first 100 days*” metrics-focused.

Across all phases, two pursuits run in parallel: **communication** and **governance**. Frequent status reports (often weekly “dashboard” updates) keep the executive committee apprised. As one integration playbook notes, a 100-day plan without a tracking dashboard is like a car “*without a speedometer*” (umbrex.com). The CFO should ensure finance KPIs (e.g. days payable outstanding, close cycle time, synergies achieved) are measured from the start. Any issues (e.g. data mismatches, missed cutover tasks) must be escalated immediately. In NetSuite, this might mean setting up custom KPIs or workflows, or even logging tasks in the SuiteSuccess project methodology tool, ensuring that the integration stays on its critical path.

Financial Consolidation in M&A Context

At the heart of post-merger integration is **financial consolidation**: combining the ledgers and reports of two formerly separate entities. In NetSuite parlance, this usually involves OneWorld (multi-subsidiary accounting) and possibly Multi-Book (parallel ledgers). Unlike spot acquisitions where financial statements might be retro-merged, modern acquirers aim for *real-time consolidation* so that operational decisions can be made on the combined data immediately (www.netsuite.com) (www.netsuite.com).

Challenges of Consolidation

Mergers put several specific stresses on finance processes:

- **Different Charts of Accounts (CoA):** “One of the most common issues” is that each company’s CoA is structured differently (mondialsoftware.com). For example, one firm may call net sales “Revenue” while another uses “Top-line Sales.” These mismatches propagate through to financial reports. During integration, the finance team must *map* and *remap* accounts so that like transactions align. NetSuite OneWorld lets you assign segments to subsidiary, but if the underlying categories differ, consolidation workpapers or automated mappings are needed. Without careful mapping, consolidated reports will have inaccuracies or wide variances.
- **Data Incompatibility:** Even in modern cloud ERP, field definitions vary. As one consultant blog поясняет, “*mismatched data fields: a ‘revenue’ category in one [ERP] may correspond to ‘sales’ in another*”, forcing manual journal entries or reconciliations (mondialsoftware.com). Legacy systems might export data only in Excel formats. The advice is to **define data mapping techniques** early (datacalculus.com), using middleware or ETL tools if necessary, to standardize transaction data before it enters the unified NetSuite environment. Any required conversion (currencies, units, tax codes) should be automated where possible.
- **Regulatory and Tax Differences:** Particularly in cross-border deals, consolidated entities operate under multiple regulations. For instance, if an American acquirer buys an EU subsidiary, the acquired subsidiary may have VAT reports, statutory GAAP filings, and multi-currency books. The integration team must ensure new consolidated statements honor all such constraints. Fortunately, NetSuite’s cloud architecture supports global taxation and multiple accounting standards. Its Multi-Book module allows

creating separate accounting ledgers; one subsidiary can still report under its own local GAAP in one book, while a consolidation ledger rolls up figures under IFRS or US GAAP for the parent company ([kpmg.com](https://www.kpmg.com)) (www.netsuite.com).

- **Intercompany Reconciliations:** When two firms trade with each other, such transactions must cancel out in consolidation. The integration must set up an intercompany framework: defining elimination accounts and scheduling elimination runs during close. NetSuite's intercompany preferences and automated elimination journals can streamline this. Without automation, finance teams would otherwise enter offsetting entries (“air”>{{color{black}quarter}} elimination postings manually. As some consultants note, “*the monthly closing process*” in multi-entity groups is often burdened by manual spreadsheet work ([greenstep.com](https://www.greenstep.com)). Thus, a key consolidation goal is to minimize manual consolidations: for wholly-owned subsidiaries, NetSuite can auto-generate elimination entries, enabling **real-time drill-down** from consolidated lines to source transactions ([greenstep.com](https://www.greenstep.com)) (www.netsuite.com).
- **Partial Ownership and Equity Method:** Some mergers involve partial buys or JV adjustments. NetSuite can handle intercompany loans and minority interests, but fully automating complex equity accounting may require custom solutions or external software. In these cases, the integration playbook should decide: either handle minority consolidation outside NetSuite (with appropriate adjusting entries) or configure NetSuite's equity layers. The Greenstep guide cautions that “*complex ownership structures...with partial ownership*” may be hard to configure directly ([greenstep.com](https://www.greenstep.com)). Either way, the CFO and accounting team need to determine who will handle these non-100%-owned entities during the first 100 days – often a mix of NetSuite and Excel.

Moving to NetSuite: Capabilities and Best Practices

For companies already on NetSuite, consolidation is built into the platform. As NetSuite's website explains, its consolidation capability provides “*centralized oversight of accounting processes, data and reporting across multiple business units*” (www.netsuite.com). In practice, this means that all subsidiaries (legal entities) can exist within one NetSuite OneWorld account hierarchy. Subledgers (AP, AR, inventory) can still close locally, but the system can roll up transactions into a corporate view automatically. Key best practices for a NetSuite-based consolidation include:

- **Uniform Chart of Accounts:** Ideally, adopt a *single* COA schema across subsidiaries. NetSuite allows one unified set of accounts that each subsidiary draws from. If the merging entities historically used different nominal codes, plan to migrate the old codes into the new shared GL. This often requires a one-time “chart cleanup” data migration in the first close under NetSuite. Having a uniform account structure greatly simplifies consolidation and reporting.
- **OneWorld Geography and Currency Setup:** NetSuite OneWorld supports multiple currencies and individual tax periods per subsidiary. Configuration recommendations are to designate a single *consolidation currency* at the top level (e.g. USD), then ensure exchange rates and translation methods (e.g. average for P&L, closing for balance sheet) are set up. This means that once you post transactions in subsidiary currencies, NetSuite can produce a translated consolidated balance sheet automatically.

- **Multi-Book (if required):** If the acquirer requires parallel reporting (for example, one subsidiary needs to report in IFRS and also in US GAAP at parent level), then NetSuite's Multi-Book feature should be enabled. Multi-Book essentially allows every transaction to be recorded in two ledgers with different accounting rules. For instance, a revenue invoice in subsidiary currency can automatically create tax and revenue reclassification in both IFRS and GAAP books. The CFO should plan which regulatory books are needed and ensure NetSuite Professional Services is engaged early if multi-book accounting is new to the organization.
- **Intercompany framework:** In the OneWorld settings, the integration team should define the intercompany framework before heavy use. This includes specifying eliminations accounts, enabling automatic matching (so if Subsidiary A sells to B, NetSuite knows to net them out) and checking that inter-unit AR/AP netting is active (www.netsuite.com). Set up any consolidation currency gain/loss accounts (for interco) to avoid posting consolidation hits to income unexpectedly.
- **Reporting alignment:** Forecasting and budgeting processes should migrate too. NetSuite's Planning and Budgeting module (if in use) and SuiteAnalytics dashboards can be configured so that consolidated forecasts are available alongside actuals. From Day 1, finance should be able to query consolidated numbers rather than maintaining two separate models. One advantage of NetSuite emphasized by customers is the *"real-time visibility"*: one can drill down on a consolidated figure to the original transaction in any subsidiary (www.netsuite.com) (www.netsuite.com).

Where one or both companies are *not* on NetSuite, the integration playbook must decide on a migration strategy to NetSuite (if this is the chosen platform). For example, if the acquirer uses NetSuite and the target uses QuickBooks, the target's books should be "switched on" as a new subsidiary in the acquirer's NetSuite. All master data (customers, items, open AR/AP balances) must be loaded before go-live. Bridgepoint's experience emphasizes thorough data prework: their SaaS client initially lacked bandwidth to provide data for the QuickBooks → NetSuite cutover, causing delays during simultaneous acquisitions (bridgepointconsulting.com). In our playbook, we underscore that **Team data analysts** should extract, clean, and transform target data weeks before final cutover, with validation steps (e.g. trial balances must match within agreed tolerances) (www.netsuite.com). Using NetSuite's built-in CSV import and SuiteTalk API, all AR/AP invoices, open POs, customer master, etc., can be brought into the unified system.

Consolidation Options: NetSuite vs Legacy vs External

Not every company will or can do consolidation entirely "within NetSuite," especially if there are special circumstances. Common alternatives include:

- **NetSuite-Focused Consolidation:** If both entities are 100%-owned subsidiaries of the same owner, consolidating directly inside NetSuite is ideal (greenstep.com). Sub-ledger data (even down to invoices and time entries) can be consolidated automatically, and real-time P&L/Balance Sheet views are available. The Greenstep analysis notes that in this "smooth sailing" scenario, *"consolidation postings are done automatically, and unified reports (P&L/BS/Elimination sheets) are available in real time"* (greenstep.com). Gartner and others have recognized NetSuite OneWorld as one of the only mid-market ERP solutions that natively support multi-entity real-time consolidation with drill-through.

- **Manual/Spreadsheet Consolidation (Excel):** Some companies (particularly those with odd partial ownership or complicated intercompany terms) may initially resort to spreadsheet work. For example, a group may complete entries in individual ERPs and then make adjusting consolidation entries in Excel. The Greenstep blog acknowledges that *“for some, the consolidation is finalized in Excel”* ([greenstep.com](https://www.greenstep.com)). They describe CFOs who still calculate consolidations offline, reporting taking only 3–4 hours monthly including the manual steps ([greenstep.com](https://www.greenstep.com)). While sometimes necessary in the short term, this approach has major downsides: it is error-prone, time-consuming, and lacks real-time oversight. We caution that spreadsheet consolidation should be viewed as a **temporary bridge** while workarounds or NetSuite features are put in place.
- **External Consolidation Software:** Larger enterprises or those with very complex stakes often use dedicated consolidation and reporting tools (e.g. Oracle FCCS, SAP BPC, OneStream) that ingest data from the ERP. These can handle complex equity and currency adjustments. If a company is already committed to such a system, the integration plan might involve loading NetSuite data into the consolidation tool instead of doing it in NetSuite. However, given our focus on NetSuite-driven consolidation, we recommend leveraging NetSuite’s capabilities first. Except for very complex cases, most scenarios can be handled within OneWorld/OneWorld+MultiBook, avoiding additional licensing cost. Notably, Mondial’s client warnings suggest that some companies choose tools like Mondial for challenges (they advertise seamless cross-chart consolidation ([mondialsoftware.com](https://www.mondialsoftware.com))). If an external tool is used, the playbook should include data extraction design and connectivity to that tool.

In practice, the CFO must weigh these approaches case-by-case. If all key subsidiaries are NetSuite-ready, the clear path is to consolidate inside NetSuite. If one acquired entity is very small or interim, continuing to run it in its legacy and simply combining reports (e.g. using NetSuite’s Saved Searches or an ETL) might suffice initially. But the trend is away from Excel: *“You can either consolidate directly in NetSuite... in Excel, or using an external consolidation software,”* the Greenstep guide notes ([greenstep.com](https://www.greenstep.com)), implying the preferred path (first option) where possible.

Key Data and Performance Metrics

Integration must be monitored with data. The CFO’s dashboard should include financial KPIs reflecting consolidation health:

- **Synergy Realization (%):** Compare achieved cost savings or revenue synergies to targets (from due diligence). McKinsey reports that companies with active CFO integration leadership typically meet or exceed their synergy plans (www.mckinsey.com). Setting up a periodic review of actual savings (e.g. in SG&A) against the 100-day targets is essential.
- **Close Cycle Time:** Track how long it takes to close the books each month and to produce consolidated statements. A key benefit of consolidation is expected acceleration of the close. Indeed, NetSuite claims its automated consolidations *“accelerate the close process”* (www.netsuite.com). The CFO should measure Day+X (e.g. Day+10) for financials before and after integration to verify speed gains.

- **Errors/ADJUSTMENTS IN Consolidation:** Count the number of manual adjustments or reconciliation issues encountered in each close. A reduction over time indicates improved configuration.
- **User Adoption/Training status:** Qualitative metric but often used. Are finance users across subsidiaries consistently using the unified NetSuite process?
- **Data trust/accuracy:** Given survey data showing “nearly 40% of CFOs do not completely trust their firm’s financial data” (ctmfile.com), an integration’s first success is building trust. We recommend simple checks: at a census, second-party review of consolidated statements, confirmation with original sub-ledger details. Over time, trust metrics could include things like “percentage of accounts reconciled without adjustment” as a proxy for system reliability.

Table 2 provides a schematic view of different consolidation approaches, their tradeoffs, and sample metrics to watch.

Consolidation Approach	Pros	Cons	Example Metrics
NetSuite One-World (All in One)	Real-time consolidated reports; drill-down to sub-ledger; built-in eliminations; automated currency translation (www.netsuite.com) (www.netsuite.com)	Requires both companies on same platform; setup complexity if COAs differ; investment in implementation resources	Month-end close days; # of manual elimination adjustments; percentage of consolidated data auto-populated
Manual Spreadsheet (Temporary)	No new software needed; can handle odd cases (partial ownership, carve-outs)	Error-prone; not auditable; delays in reporting; significant staff time (greenstep.com)	Hours spent on consolidation; # of reconciliation errors; user training hours
External Aggregator Tool	Handles very complex consolidations (e.g. equity method, multiple GAAP)	Licenses + integration effort; data latency if not real-time	Cost vs budget; frequency of consolidation runs; audit findings
Hybrid (Partial consolidation)	Quick wins consolidating obvious overlaps; postpone minor issues	Can create parallel processes (some reports in NetSuite, some in spreadsheets)	% of entities consolidated in NetSuite; incidents of duplicate work

Table 2: Comparison of consolidation methods and key performance indicators.

Case Studies and Examples

Real-world integrations highlight both the power of consolidation tools and the challenges when integration lags. We summarize three illustrative cases:

1. SaaS Office Space Company (Bridgepoint Consulting Case): A rapidly growing cloud SaaS company was under private equity ownership and needed to modernize its finance function. It had been on QuickBooks and grew by acquiring two smaller firms (with ~hundreds of subscription contracts each). The PE firm mandated a move to NetSuite as the core platform. Bridgepoint (a NetSuite partner) led the project starting around mid-year. Despite adding two acquisitions mid-project and working through holiday seasons, the team “successfully delivered on the implementation of NetSuite and ancillary services for all entities by the January

1st deadline” ([bridgepointconsulting.com](https://www.bridgepointconsulting.com)). The results were immediate: management from private equity could now “*present consolidated financials to the PE firm straight from their ERP rather than consolidating in an Excel file*” ([bridgepointconsulting.com](https://www.bridgepointconsulting.com)). In other words, NetSuite allowed real-time roll-up of multiple subsidiaries with no manual spreadsheet consolidation. Importantly, Bridgepoint’s work also set up the client so that **future acquisitions** (they completed another deal afterwards) could be integrated easily: the data model and processes were in place ([bridgepointconsulting.com](https://www.bridgepointconsulting.com)). This case exemplifies how the first 100 days (plus third-party expertise) can replace labor-intensive workflows with automated consolidation, directly achieving one often-cited synergy goal (headcount reduction in finance and systems).

2. Healthcare Software Group (NetSuite Case Study): A European healthcare software provider, facing fragmented systems across regions, decided to migrate all subsidiaries onto NetSuite. Before the move, “*each entity used separate ERP or financial accounting tools, leading to inefficiencies, reporting delays, and difficulties in consolidating*” (www.linkedin.com). Their solution was a unified NetSuite ERP. Post-migration, the company achieved a “*single, scalable cloud ERP*” for all financial processes (www.linkedin.com). The impact was transformative: they eliminated redundant ledgers and could produce consolidated statements on demand. This example underscores that even when a merger is not strictly in the M&A sense, *rapid growth* (akin to serial acquisitions) requires consolidation. It also illustrates the risk: before NetSuite, the group suffered from delayed visibility of its own numbers – exactly the kind of problem that NetSuite integration aims to solve.

3. Quatris Healthco Merger (NetSuite Customer Story): In a slightly different scenario, Quatris and Healthco were sister companies (both in health records software) that merged under a private equity partnership. Both had independently run NetSuite, but post-merger they needed one common account. Cari Thomas, CFO of the combined firm, reported that leveraging NetSuite was “*a competitive differentiator*”: within six months both companies were transacting on a single NetSuite instance (www.netsuite.com). The unified system provided one set of KPIs and real-time data to all stakeholders. Thomas even likened the platform to a strategic asset, because it enabled integrated renewal tracking, unified AP/AR, and a single ledger of record (www.netsuite.com). This real case confirms that when both parties are already on NetSuite, the transition can be rapid and yield immediate synergies. It also shows the CFO’s perspective: she valued the *single view* of financials and operations as a lasting integration benefit.

4. Multi-National GAAP Conversion (KPMG Case): Lastly, an acquisition from a multi-jurisdictional perspective: a large US manufacturing company (US GAAP) was acquired by a European parent (IFRS). According to the IFRS Institute, within months the US subsidiary had completed a GAAP-to-IFRS conversion, purchase price allocation, and alignment of its accounting policies to the parent’s IFRS framework ([kpmg.com](https://www.kpmg.com)). They credit “*top 10 common finance integration processes*”, including policy alignment and process adjustments. Though KPMG’s writeup is more guidance than a step-by-step, it confirms that **aggressive integration is possible even with major accounting shifts** ([kpmg.com](https://www.kpmg.com)). In a NetSuite context, this case parallels what the Multi-Book module is designed to simplify: rather than doing a messy conversion on-the-fly, the subsidiary could either run two ledgers or switch books cleanly as System One. Either way, the lesson is that crossing GAAP standards, while daunting, can be done swiftly with proper planning.

These examples drive home the potential for consolidation to **enable** deal value: automated reporting, faster closings, clearer insights. They also hint at pitfalls: manual workarounds (Excel, disparate systems) slow progress, and data issues can derail confidence (recall that nearly 40% of CFOs report not fully trusting their own data (ctmfile.com)). Our playbook aims to capitalize on the above success factors (use common systems, engage the CFO, automate where promised) and mitigate the above risks (plan conversions, systematize data flows, define clear policies).

Implementation Roadmap: Systems and Tools

Achieving the 100-day consolidation plan requires specific tools and systems strategies, with NetSuite at the core but supported by integration and analytics tech.

NetSuite SuiteSuccess Methodology: A rapid ERP rollout is aided by NetSuite's *SuiteSuccess* implementation framework. As one NetSuite partner notes, SuiteSuccess provides *"built-in best practices that support rapid implementation timelines"* and sector-specific templates (www.netsuite.com). This means pre-configured KPIs, role-based dashboards, and data load templates that speed up going live. In an M&A situation, we recommend applying SuiteSuccess accelerators to the extent applicable (e.g. if the merged entity is in a known industry vertical), so that the 100-day timeline can be realistically met. NetSuite claims SuiteSuccess delivers "rapid ROI" by shortening the time to an operational system (www.netsuite.com).

Integration/ETL Middleware: Even with NetSuite as the target, one often needs middleware to connect legacy systems. Tools like Dell Boomi, Celigo, or MuleSoft can link disparate ERPs to NetSuite in near real-time or batch mode. For example, if the target's warehouse feeds an inventory system, a middleware flow can keep NetSuite updated on stock levels. In smaller cases, high-quality CSV exports and imports might suffice. Regardless, we advise establishing at least basic data pipelines for master data (customers, suppliers, chart of accounts) *before go-live*. Each potential source of risk (e.g. a large set of transactions) should have an integration plan. In one integration, a consultant noted that using such tools *"cut reconciliation times by more than 50% and generated accurate consolidated financial reports within days"* (datacalculus.com). The CFO should champion acquiring or reallocating data resources (data engineers, integration architects) early.

Financial Reporting and BI: Creating consolidated reports is greatly aided by NetSuite's built-in analytics and saved searches. But many organizations also use separate BI solutions (e.g. SuiteAnalytics Workbook, Tableau, Power BI). If a pre-existing BI tool exists, ensure it can connect to the new consolidated dataset without major redesign. We recommend cross-verifying key NetSuite reports with legacy results (e.g. running a NetSuite Consolidated Trial Balance and comparing with last standalone close). Having robust reporting from Day 30 locks in confidence.

Close management software: Some larger companies use dedicated software to manage the closing checklist (e.g. FloQast, BlackLine). If such tools are in use, integration teams must include them in the plan (e.g. migrate BlackLine usage to consolidated environment). BlackLine itself reports that CFOs value their

product for M&A integration because it centralizes close tasks. However, for our purposes, the main tool-specific advice is to treat NetSuite as the single merchant of truth wherever possible, and minimize any separate repository.

Governance and Documentation: Use of collaboration tools (e.g. shared project management platforms) ensures accountability. A living **integration log** should be maintained: decisions, risks, pending items. In smaller deals this can be a shared spreadsheet or wiki, but in larger implementations it might be a full project system. Regardless, capturing “lessons learned” in real time prevents the same problems from recurring. By Day 90, the goal is to have a finalized “integration playbook” documenting all changes (new processes, consolidated policies, etc.) so future auditors or new team members can understand the new structure.

Organizational and Cultural Factors

A successful consolidation is not just a technical exercise; it is a **change management** one. Employees from both legacy companies will be anxious about job security and shifts in processes. Surveys show that **culture clashes and talent losses** are major reasons integrations falter. The studies cited earlier note that about half of inexperienced acquiring teams end up worse off financially after three years (www.fm-magazine.com) – often due to squandering institutional knowledge and morale. The CFO must therefore act with empathy and transparency: involve retained finance personnel in designing the new chart of accounts and intercompany rules, giving them ownership and shortening learning curves. Offering referrals or placement support to those let go, and setting up a forum for feedback, can mitigate disengagement.

Communication is critical: from Day -1, a simple flyer or email explaining the “*10-Day Roadmap*” of integration tasks can help employees see that “we have a plan.” The CFO should team with the CHRO to plan joint town halls focusing on financial integration outcomes (e.g. “*We will all be able to run consolidated balance sheets in one system soon*”), not just general synergy rhetoric. As one reinforced CFO guidance puts it, *fostering an inclusive culture* via assessments and open communication “*mitigate[s] risks of disengagement and turnover*” (www.fdcapital.co.uk).

NetSuite can aid here too: by demonstrating a working, user-friendly system early, management can build credibility. For instance, if Sales reps from both legacy companies now see deals in one pipeline and commission statements unify in NetSuite CRM, it tangibly proves the merger’s benefits. Conversely, if finance folks have to pivot daily between two ERPs, cynicism will grow. Thus, push to integrate systems that touch many employees as soon as feasible.

Data Analysis and Evidence-Based Insights

Throughout this playbook, we have woven in data and evidence to justify recommended actions. To summarize key analytical points:

- **Integration Speed vs Success:** A critical analysis by Angwin showed that *more change in the first 100 days was NOT reliably linked to success*, except for older deals (suggesting hindsight bias) (www.researchgate.net) (www.researchgate.net). However, speed remains an accepted best practice.

Therefore, our approach is to be brisk but measured – we act quickly on knowable priorities (e.g. chart merger, system cutovers) while leaving larger transformation (e.g. implementing a new ERP module) for later if needed.

- **CFO Impact on Synergies:** Both McKinsey research and practitioner surveys align: CFO-led integrations see significantly better synergy outcomes. For example, **37% of CFOs said they were “very involved” in integration**, up from prior years (www.mckinsey.com). When those CFOs led integration, their firms “captured cost and revenue synergies that were at or above plan.” Conversely, CFOs who remained hands-off often saw synergy targets slip. We cite these findings to emphasize priority: make the CFO (or an equivalent integration finance leader) accountable and active in every step.
- **Trust in Financial Data:** Lack of trust in data is alarmingly high – nearly **40% of CFOs do not fully trust their own financials** (ctmfile.com). This underscores a major rationale for consolidation: moving to one system is the most straightforward way to improve data integrity. We can explicitly track “data errors” as a metric, aiming to reduce them each close.
- **Time Savings:** While hard to quantify generically, case experiences suggest *dramatic* improvements in cycle time when consolidating in ERP. Bridgepoint’s case, for instance, replaced a “consolidate in Excel” process with an ERP close by Jan 1 (bridgepointconsulting.com). We recommend that each integration set targets like “30% reduction in close days” as a KPI. NetSuite’s own materials claim automated consolidations accelerate the close (www.netsuite.com); Finance leadership can use these corporate claims as a benchmark (though real results of course depend on company size and complexity).
- **Cultural and Retention Risks:** Empirical studies (e.g. from Global PMI Partners) show that *“inexperienced buyers [take] worse shape financially three years post-deal”* more than half the time (www.fm-magazine.com). A significant factor is often people turnover. CFOs should therefore allocate part of the first 100-day war chest to retention bonuses or integration training – small investments relative to deal value. We cannot cite a hard percentage for retention improvement, but industry surveys consistently list “loss of key personnel” as a top integration failure cause. Proactively onboarding key hires into the combined team (e.g. dual-roles bridging old companies) can deliver both cultural goodwill and mission continuity.

Future Directions and Digital Trends

Looking ahead, several trends will shape M&A integration and consolidation:

- **Cloud and ERP Convergence:** The move to cloud ERP (of which NetSuite is a leader) will continue. The advantage of cloud is exactly enabling faster post-deal consolidation: pre-built global features (multi-currency, multi-tax) and no on-prem upgrades required. We foresee an industry expectation that large deals will mandate a quick consolidation onto one cloud ERP platform.
- **Enhanced Analytics and AI:** As firms increasingly leverage data analytics, one can imagine integration playbooks using AI to predict which financial processes to integrate first (based on patterns) or to automatically reconcile accounts. NetSuite itself is adding AI features (e.g. SuiteAnalytics flows). Future

CFO dashboards may include AI-based anomaly detectors that alert when consolidation numbers deviate from plan. Our playbook's emphasis on metrics sets the stage for this: by the next acquisition, teams could analyze their first 100 days of integration data to continuously improve timing estimates.

- **Multi-Entity, Multi-Book Innovations:** Regulatory demands continue to grow. NetSuite and competitors are likely to expand Multi-Book capabilities (e.g. easier subsidiary-specific book definitions, automated tax adjustments at consolidation). Companies may soon expect real-time consolidation not just for GAAP but also for internal MI (Management Information) and ESG reporting. If a merged company has, say, 50 subsidiaries, a next-generation tool might automatically present consolidated reports in dozens of statutory formats simultaneously. The 100-day plan would accordingly incorporate multi-entity roll-ups not just for finance, but to feed global risk management or investor relations.
- **Integration-as-a-Service:** The partnership eco-system (like Bridgepoint, SuiteSuccess partner network) is growing. Instead of building deep in-house integration expertise, more acquirers will likely buy packaged playbooks and pre-made connectors for common targets (e.g. "NetSuite to Salesforce mergers"). We foresee more standardized offerings – e.g., NetSuite Alliances already advertise M&A toolkits for PE firms. This potentially raises the bar: CFOs and CIOs will assess not just any NetSuite partner, but those with proven M&A track records.

Conclusion

Post-merger integration remains a formidable challenge, but one in which thoughtful planning pays rich dividends. Finance consolidation is often where the rubber meets the road: if an acquirer can report a clean, unified balance sheet by the end of the first quarter post-close, it has not only satisfied regulators but also signaled to stakeholders that the merger is on track to deliver promised value.

This 100-Day M&A Integration Playbook, centered on NetSuite, provides a **granular roadmap** for finance leaders: it assimilates decades of M&A lessons into a toolkit of actions, each linked to data and examples. We have stressed speed and decisiveness, backed by evidence from McKinsey and others about CFO involvement and synergy capture (www.mckinsey.com) (www.mckinsey.com). We have shown how NetSuite's automation (e.g. one-click consolidations (www.netsuite.com)) can turn a huge manual burden into a routine process. And we have balanced ambition with caution: recognizing that the first 100 days should build momentum but cannot finish every task.

Successful consolidation in this period yields multiple benefits: **cost savings** (by eliminating duplicate finance costs), **strategic clarity** (by having integrated data for decision-makers), and **maintained morale** (by showing employees clear direction). For example, our Bridgepoint case ends with the client **presenting consolidated financials straight from the ERP** (bridgepointconsulting.com). As a tangible goal, any integration team using this playbook might aim by Day 100 to have one set of up-to-date financial documents (P&L, cash flow, balance sheet) for the combined company, released with "closing packages" as if it were one business. Achieving that would check off many of the mission's objectives at once.

In implementation, it is imperative to document *every* decision. The post-close environment is demanding and fast, and integration work often uncovers unforeseen wrinkles. By logging our checkpoints and results (and citing sources like those above), we treat integration as a learning institution: continuous improvement for

finance teams.

In closing, M&A integrations are hard, but they need not be chaotic. With vigilant CFO leadership, rigorous use of tools like NetSuite, and a fact-based roadmap as outlined here, organizations greatly raise their chances of turning a merger from a gamble into a springboard for growth (www.mckinsey.com) (www.netsuite.com).

Investments made in the first 100 days — in systems, people, and processes — set the tone for sustainable value creation. The evidence is in: deals where companies *execute early and well* on consolidation tend to be among the few that succeed (www.fm-magazine.com) (www.mckinsey.com). This playbook provides the step-by-step approach and rationale to do exactly that, anchoring the bright prospects of M&A with a solid financial foundation.

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