HOUSEBLEND

How to Actually Vet a NetSuite Partner: Vetting Checklist for a First Implementation or a Rescue

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01. Two Different Readers Land Here

There are two very different reasons to be reading a NetSuite partner-vetting guide right now, and they call for two different checklists.

The first reader is evaluating a partner before signing anything, comparing a shortlist, sitting through demos, trying to figure out which pitch is real and which is polish. The second reader is already past that point. They're on NetSuite, or mid-implementation, with a partner already in the picture, and the question isn't "should we do this" anymore, it's "do we stay, switch, or restart."

Houseblend has already made the broader case for why partner selection matters at all in **Will Your NetSuite Implementation Partner Help or Hurt You?** That piece covers the five checks behind good vetting, the Alliance Partner vs. Solution Provider distinction, and what a demonstrated discovery process should actually produce. If you haven't read it and want the fuller argument first, start there. This piece doesn't re-make that case. It's the applied tool: run it against your own shortlist, or your own already-shaky partner relationship, and see where you land.

A quick self-check to route yourself: Are you comparing vendors you haven't signed with yet? Go to Section 02. Are you already on NetSuite, with a partner relationship that's stalled, gone quiet, or produced a system nobody trusts? Go to Section 03. If you're honestly not sure which camp you're in, say, a partner is technically still delivering but you've stopped trusting their timeline estimates, read both, starting with Section 04, which covers the ground the two tracks share.

02. Track A — Evaluating a Partner Before You Sign

This is the checklist for the first posture: comparing partners, none of them signed yet. Run each item against every name on your shortlist, not just your favorite.

Industry and vertical fit, real, not claimed. A partner's own site tells you more than its pitch deck does. Look for actual case studies with module-level detail specific to your industry, not vague "digital transformation" language that could describe any client in any vertical. Beyond Cloud's own vetting framework names this directly as a red flag: case studies with zero module detail and generalist "we do it all" positioning are a sign the partner hasn't actually built a repeatable playbook for your kind of business.[1] The test is simple. Does the partner's site show a real, specific vertical focus, or does it read like it was written to apply to every prospect equally?

Named staffing transparency. This is the single most common failure pattern named across buyer conversations: certified, senior names on the partner's marketing site, and a very different team once the contract is signed. One buyer, describing what they'd want from a partner before signing, put it plainly: "If I were hiring an implementation partner, I would want to interview the actual project team and get to know them and their actual track record before I signed anything. So many times we see the demo and the discussion from the polished sales team... that doesn't always translate/filter down to the implementation team."[2] Another buyer framed the standard even more bluntly: "Having a GREAT PM is imperative and spend the effort defining what you want to get, so you pick the right one. Hammer them to prove to you they can deliver that."[3] That's not a rhetorical flourish, it's a literal instruction to insist on meeting the actual delivery team, not the sales team, before signing. For the mechanics of how partner staffing models differ, Houseblend's implementation partner roles guide covers who typically sits on a delivery team and what each role is supposed to own.

How the partner gets paid. Asset 1 covers the Alliance Partner vs. Solution Provider distinction in depth: Solution Providers sell NetSuite licenses directly and implement on top of that sale; Alliance Partners don't resell licenses, so the client licenses directly from Oracle and engages the partner separately for services. Neither model is automatically wrong, but the incentive structure changes what the partner is motivated to recommend, and you should know which one you're signing with before you sign it. See the full breakdown of partner types and tiers for the mechanics, this piece won't re-run that ground.

A written, itemized scope, not a verbal reassurance. "We'll cover what you need" is not a scope. A real scope is a document that names, specifically, what's included and what's explicitly excluded, and it should exist before any work starts, not get negotiated retroactively when something turns out to be missing. Scope creep often shows up first as an over-customization pitch. One buyer's warning is worth building into your own scoping conversations directly: "Be very wary of firms who talk about tons of scripting. Some may be necessary, but it should not be option 1."[4] A partner reaching for heavy customization early in a sales conversation, before understanding your actual requirements, is a partner who may be building toward change orders rather than toward a fixed, itemized scope.

References with teeth, run before you sign. A reference check that consists of one phone call and a "yes, they were great" is close to worthless. Ask process-specific questions: did the scope hold, did the staffing match what was pitched, what would they do differently. Comparing quotes matters here too, and not in the direction you'd expect. One buyer's experience: "It's very hit or miss and you don't always get what you pay for $/hr wise. We've used $400/hr consultants that weren't as good as $150/hr consultants... I would highly recommend interviewing several consultants and compare their quotes."[5] Price is not a reliable proxy for quality here, it's a reason to actually run the comparison rather than assume the expensive option is automatically the safer one. And don't limit your references to the ones the partner hands you. One buyer's alternative approach: "try to contact a NetSuite User Group to ask to speak to a company that uses NetSuite in a similar sector as your own organisation. I think it's always more valuable to get information directly from another organisation that's gone through the same process, rather than listening to endless sales demos."[6] A partner-supplied reference has already been pre-selected to say good things. A peer company found independently hasn't been. For a broader view of the boutique-firm landscape this shortlist likely sits within, see Houseblend's guide to boutique NetSuite consulting firms.

The directory-listing caveat. Being listed on **Oracle's Find a Partner directory** confirms a partner has a real, Oracle-recognized relationship with NetSuite, filterable by industry and geography. It does not confirm the partner is right for your specific situation, your specific complexity, or your specific budget. Treat the directory as a starting point for building a shortlist, not as a substitute for the checks above it.

A financial-background check, not just a technical one. One buyer's framing is worth adding as its own line item, separate from general industry fit: "choose a NetSuite partner with a solid financial background. Too often, I've seen implementations where the partner did a decent job technically but lacked the financial depth to make it work for the business... it's the difference between failure and a successful implementation."[7] A partner can be technically fluent in NetSuite's configuration options and still miss what actually makes the numbers work for your specific business model. Ask directly about the team's accounting and financial-operations background, not just their NetSuite certifications.

03. Track B — Evaluating a Partner for a Rescue

This is the checklist Asset 1 explicitly declined to be. If you're already on NetSuite, or mid-implementation, and the relationship with your current partner has stalled, gone quiet, or stopped producing numbers you trust, this section is written for you directly.

A forensic audit before a quoted fix, the gate item. The single most important signal in a rescue conversation is whether a prospective partner insists on auditing what's actually broken before quoting a fix. A partner who proposes a solution before understanding the configuration, the data structure, and where trust actually broke down is repeating the exact failure pattern that likely created the mess in the first place: moving fast on a plan nobody has actually validated. Houseblend's own buyer-research work on rescue engagements identifies forensic diagnostic capability, the ability to assess what's actually broken before proposing a fix, rather than defaulting to a generic re-sell, as the strongest-evidenced criterion this type of buyer applies. Ask directly: will you audit before you quote, and what does that audit actually produce as a document I can read? This is consistent with how switch-support practitioners themselves describe a responsible transition: "The first step when changing NetSuite partners is usually a structured review of your existing NetSuite environment. The goal isn't to critique past implementation decisions or immediately recommend major changes. Instead, the focus is on understanding how your system is configured today, how your team uses it and how NetSuite fits into your broader business operations."[8] That's the audit-before-fix posture stated directly, from a firm that does this kind of transition work.

Documentation discipline for the handoff. Before a new partner touches anything, they should be documenting the current configuration and data state as it exists right now, not working from what the previous partner said it should look like. An incumbent partner's willingness (or refusal) to cooperate with that documentation process during a handoff is itself a signal worth watching. A partner stalling on providing access or documentation during a switch is telling you something about how the original relationship broke down. Two practitioner sources describe what this should look like in practice. On the incoming partner's side: "If your current NetSuite partner is willing to participate in a handoff, they may share context around recent work, open issues or known challenges within the system. But even if a formal handoff doesn't happen, a new partner should still be able to move forward by reviewing existing documentation, scripts, integrations and internal workflows."[8] On the outgoing side, one switch-management guide recommends the buyer formally "provide formal notice of termination as outlined in your existing agreement and request all documentation needed to support the handoff," then "arrange knowledge transfer sessions" between the incoming partner and internal staff.[9] Ask a prospective rescue partner what they'd need from you on both sides of that handoff before they'd feel confident starting work.

Continuity and explainability of prior decisions. A strong rescue partner can look at what the previous team built and explain, in plain terms, why they likely made the choices they made, even the bad ones. A weak rescue partner's first move is to declare everything before them simply wrong, without engaging with why it exists. The first response builds confidence that the new team actually understands your system. The second is a sales tactic dressed up as competence.

Speed to stabilization, and the switching-cost math. Switching partners mid-project is not a clean, cost-free reset. Internal buyer research for Houseblend's own ICP puts the added timeline cost at six months or more once a switch happens, which means a buyer who has already decided to switch is, almost by definition, unusually time-sensitive from that point forward. Ask a prospective rescue partner directly how they sequence stabilization work, and what "stable" looks like as a checkpoint before the full fix is even underway.

What "fixed" should actually look like before the final invoice. Set acceptance criteria before the rescue work starts, not after. At minimum: what specific outputs (a working close process, an accurate inventory count, a report that reconciles) have to be true before the engagement is considered done and the final invoice gets paid. This closes the loop from the forensic-audit opener above, the audit told you what was broken; the acceptance criteria tell you when it's actually fixed. For the fuller diagnostic picture of what a failed implementation looks like in the first place, see **Section 3 of Asset 1**.

04. Where the Two Tracks Share Ground

The split above is real, but it isn't total. Some criteria matter regardless of which track you're on: references (Track A's version checks for future fit; Track B's version checks for a track record of actually fixing things), incentive-model transparency (how the partner gets paid matters whether you're signing for the first time or re-signing for a rescue), and a written scope (the document that protects you from surprises later, in either direction).

What's genuinely different between the tracks is industry fit and staffing transparency on the Track A side, versus forensic audit capability and documentation discipline on the Track B side, those are the criteria specific to each posture, not shared ground.

This two-track-then-converge structure isn't arbitrary. Houseblend's internal buyer research on how greenfield, rescue, and PE-driven buyers actually search found that these buyer types diverge sharply at the top of the funnel, a first-time buyer searches "outgrowing QuickBooks," a rescue buyer searches "failed NetSuite implementation," but converge in the middle, once anyone is actually comparing vendors, onto nearly the same handful of evaluation criteria. That's the reasoning behind splitting this piece into two tracks at the start and merging them here: the entry point differs, the actual evaluation logic mostly doesn't.

05. Red Flags and Green Flags

Here's the same ground from both tracks, condensed into paired comparisons: what a weak answer sounds like, next to what a strong one sounds like, on the three highest-stakes items.

On scope. Weak: "Don't worry, we'll cover what you need." Strong: a written, itemized list of exactly what's included, with exclusions named explicitly rather than left implied.

On staffing. Weak: "Our best people will be on this." Strong: named team members, with their actual NetSuite experience level disclosed, before the contract is signed.

On a rescue audit. Weak: a fix quoted before anyone has actually looked at what's broken. Strong: an audit-first proposal that names what needs to be assessed before any remediation work begins.

06. FAQ

How many partners should I actually shortlist before deciding?
Enough to make the comparison real, not so many that references and discovery calls become unmanageable. Three is a common working number in practice, enough to see a real spread in staffing transparency, incentive model, and pricing, without turning the process itself into a second full-time job.

Should I run this same checklist on a partner I'm already reconsidering, not just a new one?
Yes. The Track A checks (staffing, scope, references) don't stop applying once you've signed, if anything, they're more useful applied retroactively to a relationship that's started to feel off, because you now have real delivery history to check the answers against, not just a pitch.

What's actually different about vetting for a rescue versus a first build?
See Section 04 above. The short version: shared ground on references, incentive transparency, and written scope; genuinely different ground on industry fit and staffing transparency (first-build-specific) versus forensic audit capability and documentation discipline (rescue-specific).

Is a partner listed on Oracle's directory automatically vetted?
No, on either track. Being listed confirms an Oracle-recognized relationship, not fit for your specific situation. This applies whether you're building your first shortlist or re-evaluating a partner mid-crisis.

Should I just hire someone to do this vetting for me?
It's a legitimate option, and one worth naming honestly. The case for doing it yourself: an independent buyer weighing the same question put it directly, "consultants are fine till you realize they charge 30k to tell you what a week of research could... just run a tight discovery checklist yourself first."[10] The case for hiring help: another buyer framed the value of an outside, incentive-neutral perspective plainly, "Without someone to guide you through the process you're going to get sales pitches from people who are incentivized to tell you their software is the best fit... Having an objective third party who has your best interest in mind will give you ROI in the long run."[11] One rough rule of thumb from the same discussion: firms above roughly $500M in revenue or publicly traded more often bring in a dedicated selection consultant; smaller companies more often lean on network referrals, RFPs, and self-serve research like this checklist.[12] This isn't just a Reddit debate, either, NetSuite itself runs a dedicated **Advisory & Selection Firm Program** for "consultants who provide independent, third-party ERP selection guidance," a real, Oracle-recognized category distinct from the Alliance Partners and Solution Providers this piece covers elsewhere.[13] There's no universally right answer here, it depends on how much internal bandwidth you have to run the process closely yourself.

07. Close

Running this checklist against a real shortlist, or a real, already-shaky partner relationship, is exactly the kind of conversation Houseblend has with prospective clients before any implementation work starts, whether that's a first build or a rescue-in-place decision. If you're comparing partners for the first time, Houseblend's **implementation services** page is a reasonable next stop. If you're already living through Section 03, Houseblend also handles rescue engagements directly.

For the fuller argument on why any of this matters in the first place, **Will Your NetSuite Implementation Partner Help or Hurt You?** is the companion piece to this one.

A related question this piece deliberately doesn't answer: how do you know if the number a partner quoted you is actually reasonable? That's a cost-and-pricing question on its own, and it's worth its own dedicated piece rather than a paragraph tacked on here, watch for a follow-up asset on NetSuite implementation cost and quote evaluation.

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Sources

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