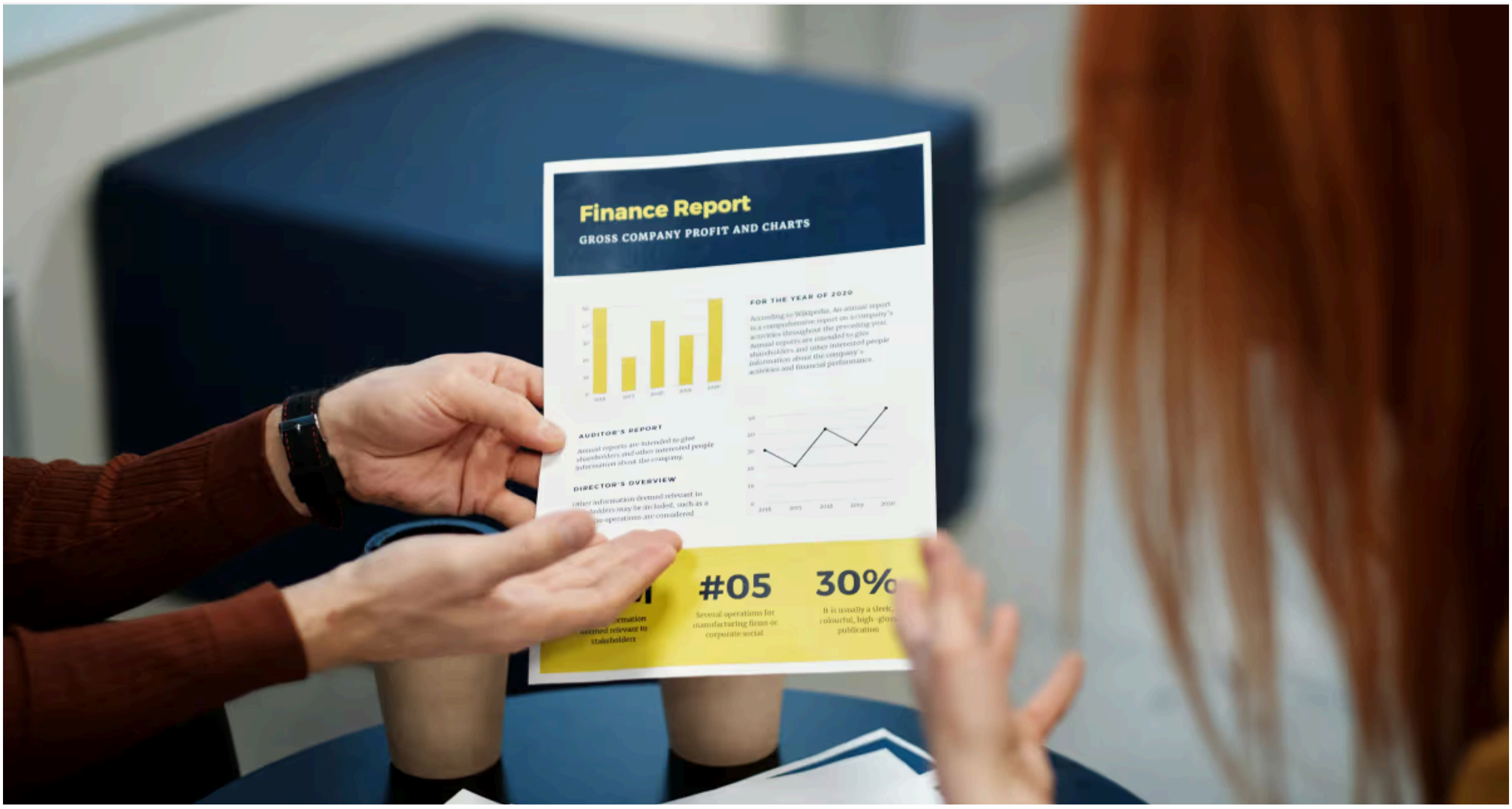

How Finance Teams Build the Internal Case for NetSuite Consulting (Without Waiting for IT to Lead)

September 24, 2026

01. The authority gap

You have already done the hard part. Somewhere in the last few weeks, you ran the diagnostic from **Article 2's self-assessment**, pulled the chart of accounts, checked whether your management performance measures live inside NetSuite or in a spreadsheet nobody else has opened, and you now know, specifically, where your instance is exposed. That is technical conviction. It is not budget authority.

Getting a NetSuite consulting engagement approved is not a single-touch purchase. It is a buying committee decision, and conviction alone does not move a committee. The next hurdle is not technical. It is internal.

02. Who's actually in the room, and what each person needs to hear

Before you write a single sentence of a pitch, name the room. Enterprise software purchases are rarely decided by one person signing off on someone else's recommendation. Gartner's own B2B buying research puts a number on this: "the average enterprise B2B buying group consists of five to 11 stakeholders, who represent an average of five distinct business functions."[1] That is not a committee you talk your way past with a single hallway conversation. It is a group you have to build a case for, deliberately, in the language each member already uses.

The economic buyer. This is the person with final budget authority — usually your CFO, sometimes your COO when the spend crosses departmental lines. One enterprise-software buying framework puts the economic buyer's actual evaluation criteria plainly: "A business case is not a features list with a price tag attached. It's a structured financial argument that answers three questions any economic buyer will ask… what does this cost, what does it return, and how confident should I be in these numbers."[2] Notice what is absent from that list: NetSuite jargon, ARM configuration detail, anything you'd recognize from Articles 1 through 3 of this series. The economic buyer wants cost, return, and confidence — full stop. There is also a timing detail worth naming here: engaging the economic buyer before your organization's annual budget cycle closes materially changes your odds of approval. IFRS 18's own deadline gives you a reason to move now rather than wait for the next cycle — more on that in Section 03.

This is also why the case gets built by a small team rather than one person alone. NetSuite's own guidance on ERP business cases notes that "when an organization starts seriously investigating whether to implement an ERP, it generally sets up a project team that includes an executive sponsor — the CEO, CFO or other senior manager"[9] — the same structure this section is asking you to build informally, even if your organization never calls it a "project team." The same source is direct about why a single argument doesn't work across a committee: "stakeholders respond to different arguments — for example, CEOs prioritize financial projections while customer service leaders look for faster issue resolution."[9] Swap "customer service leaders" for your own COO or IT lead, and that is precisely the point the rest of this section makes.

The COO (or whoever owns operations, when the engagement crosses departmental lines). The COO's concern is different from the CFO's, and that difference is the whole reason a pitch aimed only at cost falls flat with this stakeholder. A COO isn't weighing dollars and confidence intervals. They're weighing operational continuity — will this engagement disrupt the close process, the order-to-cash cycle, the reports finance actually depends on week to week. If your organization has ever lived through, or even just heard about, a stalled implementation, your COO will filter any new consulting conversation through one question: will this become another one of those. That is not paranoia. It is a reasonable filter, and you should answer it directly rather than hope it doesn't come up.

The IT lead (your NetSuite admin, or director of business systems). Their concern is integration feasibility and scope — and, more pointedly, not wanting to discover after the fact that a decision affecting their systems was made without them in the room. This is a stakeholder-management point as much as a technical one: whatever chart-of-accounts remapping and saved-search dependency work this engagement eventually surfaces is exactly the kind of work your IT lead will want visibility into before it starts, not after a signature is already on a statement of work.

Here is what typically happens when a spotter skips this step. The controller who ran the diagnostic takes the finding straight to the CFO, gets a sympathetic hearing, and a scoping call gets booked. Then the COO hears about it secondhand, in a leadership meeting, from someone other than the person who did the work — and now the COO isn't evaluating the engagement on its merits, they're evaluating why they were the last to know. The IT lead hears about it later still, possibly after a vendor is already on a call with the CFO, and treats the whole thing as something being done to their systems rather than with their input. None of this is really about NetSuite. It's about sequencing who hears what, from whom, in what order — which is exactly why Section 02 exists before Section 04's actual argument does.

It's worth being honest about how hard this coordination problem is, structurally, even outside your specific situation. Gartner's own research on B2B buying finds that "99% of B2B purchases are driven by organizational changes… and 66% of B2B buyers say the amount of change in their organization is overwhelming."[3] You are not failing at internal politics if this feels hard. It is hard, by design, for almost everyone trying to move a multi-stakeholder decision. The difference between the cases that get approved and the ones that stall in committee is usually whether someone did the work of naming the room before writing the pitch — which is exactly what this section just did.

03. The forcing function: turning IFRS 18 into a CFO-legible deadline

Your CFO does not need a restatement of what IFRS 18 requires — that's **Article 1**'s job, and if this is the first place your CFO is hearing about the standard, send them there first. What they need from you is translation: an already-established fact, restated in boardroom language rather than accounting-standard language.

Here is the fact. System changes — chart-of-accounts redesign, subsidiary-level data alignment — need to be operational well before the standard's effective date, not scrambled into place after year-end close has already started.[4] That is the same deadline pressure this series flagged as the reason 2026-and-wait is not a viable posture,[5] and it is the same closing argument Article 3 used to frame why the window on a stalled or under-scoped implementation is closing, not holding steady. Say that plainly to your CFO: this is not a discretionary spend competing against other discretionary spends on next year's list. It has a date attached, and the date does not move.

Make the retrospective mechanic concrete, because it's the detail that actually lands with a CFO. IFRS 18's comparative-restatement requirement means the 2026 numbers your organization reports don't get graded against 2026's own standard — they get restated and re-graded against IFRS 18 once it's in effect. Miss the readiness window, and you're not just late to a compliance deadline; you're redoing a prior period's classification work under time pressure, during the same season your team is also closing the current year. That is the sentence that turns "we'll get to it" into a scheduling problem your CFO already knows how to take seriously, because it's the same category of problem as any other retroactive audit adjustment.

That is the entire job of this section. No new regulatory analysis — that argument is already made, elsewhere in this series. The only new work here is turning an established fact into a sentence your CFO would use in a budget meeting.

04. Building the internal narrative: a structure, not a script

You do not need new evidence to make this case. You already have everything the case requires, sitting in the self-assessments you've already run. What you need is a structure for sequencing what you know, so a busy economic buyer can follow the argument in the order it needs to land.

Problem. Start with what you already have — the specific answers from your own self-assessment in **Article 1** or **Article 2**, not a generic statement that "IFRS 18 affects us." This series already gave you three named categories to check against — revenue recognition timing, multi-entity consolidation, and management reporting presentation — so use them here, too: "we have unclassified other-income accounts across two subsidiaries" is a named exposure point. "We might have some IFRS 18 issues" is an abstraction, and abstractions are what get a business case tabled rather than approved. If your self-assessment turned up more than one category, lead with whichever one is easiest to attach a dollar figure to — that's the one that will carry the rest of the argument.

Cost of inaction. This is where the deadline from Section 03 does its work: restatement mechanics apply retroactively, which means "we'll deal with it in 2026" quietly becomes "we're now restating 2026 comparatives under time pressure in 2027." Say the cost in that order, because it's the order that makes the inaction feel expensive rather than merely late.

Cost of the wrong fix. This is the beat most internal pitches skip, and it's the one that actually protects you if the engagement later goes sideways. Rand Group, citing Gartner-attributed research, puts a number on what happens when ERP remediation gets escalated to the wrong partner or handled reactively: a 55–75% failure rate for ERP implementations broadly, and rescue costs running 150–200% of the original project budget once a stalled or mishandled engagement needs to be corrected.[6] You are not asking your CFO to avoid all risk — that's not a real option here. You're asking them to avoid the specific, well-documented risk of picking the wrong scope or the wrong partner under time pressure.

The ask. This is the beat that matters most, and the one most internal pitches get wrong by being too big or too vague. One ERP consultancy's own guidance to CFOs frames the job this way: "The CFO's role is to craft that case in a way that resonates not just with IT… When you tie pain points to dollars and business impact, executives take notice."[7] The same source is specific about what "resonates" requires in practice: "CFOs must demonstrate payback timelines, measurable outcomes, and exactly how results will be tracked after go-live."[7] Translate that into your actual ask: request a scoped, fixed-length diagnostic engagement — not an open-ended consulting relationship. A defined start and end, a defined deliverable, and a defined next decision point at the end of it. That is a request a CFO can approve in one meeting. An open-ended engagement is a request that gets tabled for "further discussion."

It helps to know what it looks like when this bet actually pays off. Mirna Therapeutics, a biopharmaceutical company that engaged Bridgepoint Consulting for a NetSuite implementation to meet Sarbanes-Oxley compliance and grant-reporting requirements ahead of its IPO, is one of the few publicly documented examples of a compliance-driven NetSuite engagement with the client on record about the result. Their CFO, Alan Fuhrman, put it plainly afterward: "Bridgepoint Consulting has been a great strategic partner and instrumental in many areas of our business — from helping us improve accounting processes for the CPRIT grant to enabling us to undergo a successful IPO."[10] That is a different company, a different compliance driver, and a different consulting partner than the one this series is written for — but it's the same underlying bet: a compliance deadline used as the occasion to fix an accounting system properly, rather than as an inconvenience to manage around. It's worth having one real example like this in your back pocket when a skeptical committee member asks whether this kind of engagement actually delivers.

One more thing worth doing before you finalize the case: validate it informally first. The same enterprise-software framework cited above makes this the fifth of its seven steps — "validate the assumptions with the customer's champion before finalizing… a business case built entirely internally and handed over cold is far easier for finance to dismiss."[2] Gartner's own buyer research, studying external buyer-seller relationships rather than internal case-building specifically, found a related pattern worth borrowing as an analogy: buyers who complete a purchase alone, without a second informed voice in the loop, report meaningfully higher regret than those who worked the decision through with someone else present.[8] The mechanism is the same even though the study measured something different: a decision pressure-tested with one other person — your COO, your IT lead, whoever from Section 02 you trust most — lands more confidently than one drafted solo and handed over cold.

05. What to actually bring into the room

A verbal pitch, however well sequenced, is not what gets approved in most organizations. What gets approved is a one-page document your CFO can forward, annotate, and bring into their own conversations with the rest of the committee.

Build it around the same structure Section 04 just walked through, adapted into a leave-behind: current-state cost (what the exposure is actually costing you, in dollars or in risk, not in NetSuite terminology), quantified benefit of acting now versus later, a cost estimate for the scoped diagnostic you're asking for, a short risk-and-mitigation list, a timeline anchored to IFRS 18's effective date, and — critically — how you'll know it worked.[7] None of this requires inventing new material. It requires assembling what Articles 1 and 2 of this series already gave you into a format your CFO didn't have to ask for twice.

Be specific about what "current-state cost" means on the page itself, because this is where most one-pagers go soft. Don't write "MPM classification gap" — that's the technical description you already have from your self-assessment, and it's exactly the language Section 02 told you your CFO doesn't want. Write it the way you'd want a risk flagged to you: which subsidiaries or account groups are exposed, what the restatement mechanic in Section 03 means for them specifically, and a rough estimate of the remediation effort involved before the readiness window closes. That's a sentence a CFO can act on. A configuration term is not.

If your CFO wants a sense of what "worked" can actually look like in dollar terms, a Forrester analysis of four companies' ERP implementations, cited in NetSuite's own business-case guidance, found average finance reporting and management efficiencies of more than $408,000 and reduced or avoided IT costs of nearly $749,000 across the group studied.[9] Treat that as illustrative, not a promise — the point is not that your numbers will match theirs, it's that "how you'll know it worked" is a question with real, previously-measured answers, not a rhetorical one.

One thing this section deliberately does not do: it does not ask you to sell your prospective consulting partner's methodology as a reason to trust them. If a partner's process comes up in this conversation at all, it should show up as a specific, checkable artifact you'd expect to see early — a discovery-phase deliverable, a scoping document, something you can point to — not as a name or a slogan asserted on faith. Your CFO is evaluating your case, not a vendor's marketing.

06. Self-assessment: are you ready to make this case?

1. Can you name, specifically, who in your organization can say yes to a scoped NetSuite assessment — not just who you'd loop in, but who actually signs?
2. Have you translated your technical findings from your earlier self-assessment into a dollar figure or a deadline your CFO would recognize without translation?
3. If your COO or IT lead heard about this engagement secondhand instead of from you, would that damage the case before it's even made?
4. Do you know what you're specifically asking for — a scoped diagnostic, not an open-ended engagement — or is the ask still vague enough that it invites a "let's revisit this next quarter" answer?

07. FAQ

What if IT pushes back on bringing in outside consultants?

This is exactly why Section 02 treats your IT lead as a stakeholder to loop in early, not a rubber stamp to collect after a decision is already made. Bring them into the framing conversation before the ask goes to your CFO, not after.

What if we already tried consulting once and it didn't work?

A bad prior experience is itself useful data — it tells you how this engagement should be scoped differently: smaller, diagnostic-first, with a defined checkpoint before any larger commitment. It is a reason to scope carefully, not a reason to avoid a second attempt.

What's the difference between this article and the one on modules and technical evaluation?

This piece is about getting the engagement approved. Once it is, the committee's next job is technical: scoping exactly which NetSuite modules need attention. That's a separate conversation, covered in the next article in this series.

08. Where this goes next

Once the internal case is made and the engagement is approved, the buying committee's next job is technical: scoping exactly which modules need attention for IFRS 18 readiness — revenue recognition, multi-entity close, and consolidation. That's the subject of the next piece in this series.

In the meantime, if you'd rather talk through scoping a diagnostic directly, **talk to us about scoping a NetSuite assessment**.

This content may be AI-generated and may contain inaccuracies. It is not professional, legal, or financial advice. Verify independently before relying on it.

Sources

1. Gartner, "The B2B Buying Journey: Key Stages and How to Optimize Them" (2023 eBook, drawing on the 2022 Gartner B2B Buyer Survey, n=771). **gartner.com** ↩
2. Ecosystems, "How to Build a Business Case for Enterprise Software." **ecosystems.io** ↩ ↩
3. Gartner, same B2B Buying Journey eBook as [1], separate stat. **gartner.com** ↩
4. Finrep/KPMG, December year-end system-readiness deadline citation (reused from Article 1's [11]). ↩
5. Reused from Article 3's [4], same underlying source as [4] above — explicit in-text echo of Article 3's urgency framing. ↩
6. Rand Group, citing Gartner-attributed ERP failure-rate research (55–75% failure rate; 150–200% rescue-cost multiplier). Reused from Article 3's sourcing. ↩
7. Concentrus, "7 Steps to Building a Winning ERP Business Case (from Define to Approval)." **concentrus.com** ↩ ↩ ↩
8. Gartner, same B2B Buying Journey eBook as [1] — regret/completion-quality stat, used as an explicitly-flagged analogy from external buyer/seller research, not a

direct study of internal business-case-building. **gartner.com** ↩

9. NetSuite (Oracle), Lisa Schwarz, “Building an ERP Business Case: How-To & Template.” **netsuite.com** ↩ ↩ ↩
10. Bridgepoint Consulting, “NetSuite Implementation Drives SOX Compliance Success, Better Reporting & Accounting Functions for Mirna Therapeutics.” **bridgepointconsulting.com** ↩