From Leads to Loyalty: Driving Growth With NetSuite CRM
Business Technology Services

October 2025

ORACLE
NetSuite
Solution Provider Partner

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Business Technology Services

We solve for business challenges & support innovation through technology solutions.

Our toolbox is equipped with leading enterprise resource planning (ERP), customer relationship management (CRM), artificial intelligence (AI), automation, & business intelligence (BI) tools.

Our end-to-end & managed service solutions help clients achieve their digital transformation goals. Services include:

- Solution Assessment & Selection
- System Implementation & Integration
- Process & Technology Design
- Upgrades, Enhancements, & Automation
- Training, Monitoring, & Support
- Implementation Project Rescues
- Business Intelligence (BI) & Analytics
- Robotic Process Automation (RPA)
- Custom Application Development
- IT & Cybersecurity Managed Services
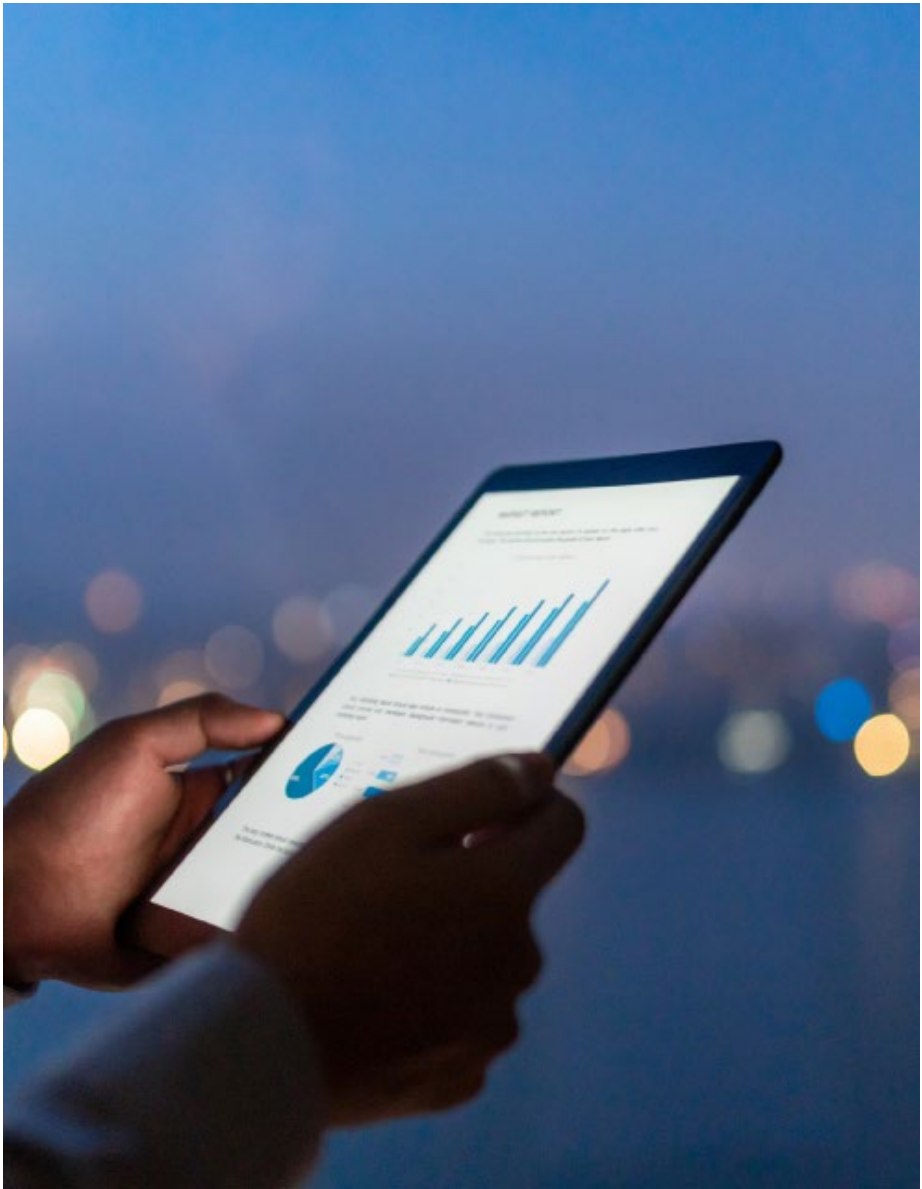
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Premier Technology Partnerships

ERP
Microsoft Dynamics 365
NetSuite
Sage Intacct
Trimble Construction One

CRM
Microsoft Dynamics 365
Marketing Automation

INSIGHTS & AUTOMATION
Microsoft Power Platform
Microsoft Copilot Studio
Workato
Robotic Process Automation (RPA)

APPLICATION DEVELOPMENT
Custom App Development

MANAGED SERVICES
Proactive Support Services for Business
Applications, IT, & Cybersecurity

Microsoft Partner

ORACLE NetSuite

Sage Partner

Trimble Construction One™

ADP

workato

solver

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Introductions
Today's Presenters

Nicholas Harris

Manager, MO

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Nicholas is a highly accomplished business leader and NetSuite solution architect with over 20 years of experience. He partners with executive teams to deliver strategic technology initiatives that drive growth and optimize performance. Nicholas has a proven track record of analyzing complex business needs and implementing customized ERP solutions, resulting in measurable business results. His experience includes solution design, implementation management, team leadership, and cultivating strong client relationships through professional services. He is passionate about contributing to growing organizations by developing and executing strategic, long-term visions that achieve significant business growth.

Marcus Schuller

Lead Consultant, MO

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Marcus is an experienced NetSuite consultant at Forvis Mazars with nearly a decade of experience. He specializes in system design and architecture, problem solving, and accounting processes, including debits and credits. Marcus has served as the lead implementation manager on client projects, demonstrating his ability to guide clients through complex implementations. Throughout his consulting career, he has worked with numerous clients across various industries. He has strong relationships with NetSuite third-party providers such as Zone and Netgain. His focus is on helping clients achieve their desired outcomes and fully leverage their NetSuite environments.

Agenda

1. Welcome & Introductions

2. Turning Reactivity to Proactivity in Customer Lifecycle Management

3. NetSuite Features: CRM

4. Scenario Walkthrough: From Lead to Customer

5. Q&A & Wrap-Up

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From Reactive to Proactive in
Customer Lifecyle Management

Reactive to Proactive
Driving Retention, Revenue, & Customer Satisfaction

Reactive Customer Lifecycle Management

Issue-Driven Engagement: Interactions are triggered by customer complaints, service failures, or escalations.

Delayed Response: Problems are addressed after they've negatively impacted the customer experience.

Higher Support Costs: Increased volume of inbound calls & tickets due to unresolved or recurring issues.

Customer Frustration: Leads to dissatisfaction & erosion of trust.

Limited Visibility: Lack of predictive insights into customer behavior or needs.

Short-Term Fixes: Focused on resolving immediate problems rather than long-term relationship building.
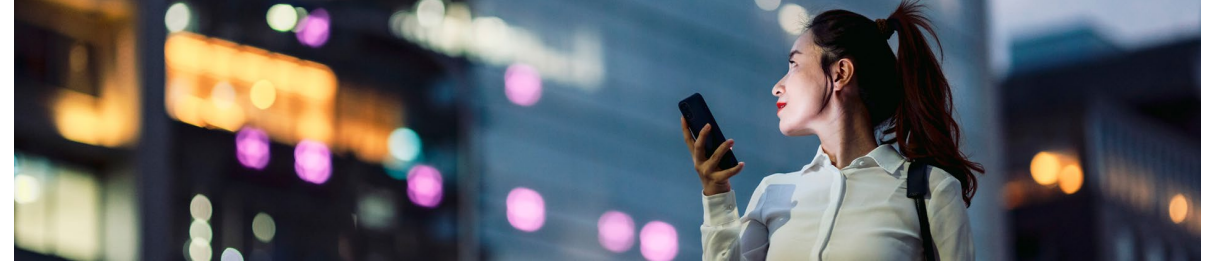
Proactive Customer Lifecycle Management

Anticipatory Engagement: Uses data & behavioral signals to reach out before issues arise.

Personalized Touchpoints: Tailored communications based on customer preferences & lifecycle stage.

Predictive Analytics: Leverages AI & machine learning to forecast churn, upsell opportunities, & service needs.

Operational Efficiency: Reduces support volume & improves resource allocation.

Customer Empowerment: Provides self-service tools & educational content to prevent confusion or errors.

Long-Term Loyalty: Builds trust through consistent, thoughtful engagement that adds value.

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Reactive to Proactive
The Cost of Reactivity

Reactive management drawbacks include constant firefighting & crisis mode, inefficient resource allocation, & higher customer churn.

Measure

5x
Customer acquisition costs (CAC) vs. retention costs

50%
Customer churn after a bad experience

Act

23%
Customer churn after a bad onboarding experience

25–95%
Reducing churn by 5% can increase profits by this much

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Reactive to Proactive
Benefits of Proactive Customer Lifecycle Management

Transform the Customer Experience

1 Enhanced Satisfaction

Proactive engagement helps customers feel understood & valued. Whether it's a timely check-in or a personalized tip, these actions build emotional loyalty & encourage long-term relationships.

Example: Sending a reminder before a subscription renewal or offering a tutorial before a product launch improves confidence and satisfaction.

2 Increased Loyalty

Proactive service helps build loyalty & turns customers into advocates by anticipating needs instead of just reacting.

Statistic: Brands that proactively engage customers see up to **20% higher retention rates** compared to reactive counterparts.

3 Competitive Advantage

In saturated markets, proactive CLM sets companies apart. Anticipating customer needs & delivering seamless experiences helps brands stand out from reactive competitors.

Example: A telecom provider that alerts users about data overages before billing surprises earns trust & reduces churn.

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Reactive to Proactive
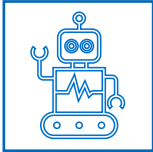## Strategic Framework for Proactive CLM

Map the Customer Journey

Identify key touchpoints

Leverage Data & AI

Predict behavior & personalize outreach

Automate Engagement

Timely, relevant communications

Create Self-Service Resources

Empower customers to solve issues independently

Monitor & Adapt

Use feedback loops & analytics to refine strategy

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Reactive to Proactive
Key Metrics to Track

Customer Lifecycle Management

To effectively manage & optimize the customer lifecycle, organizations must monitor key performance indicators that reflect both customer behavior & business impact. These metrics provide actionable insights into how well proactive strategies are working & where improvements are needed.
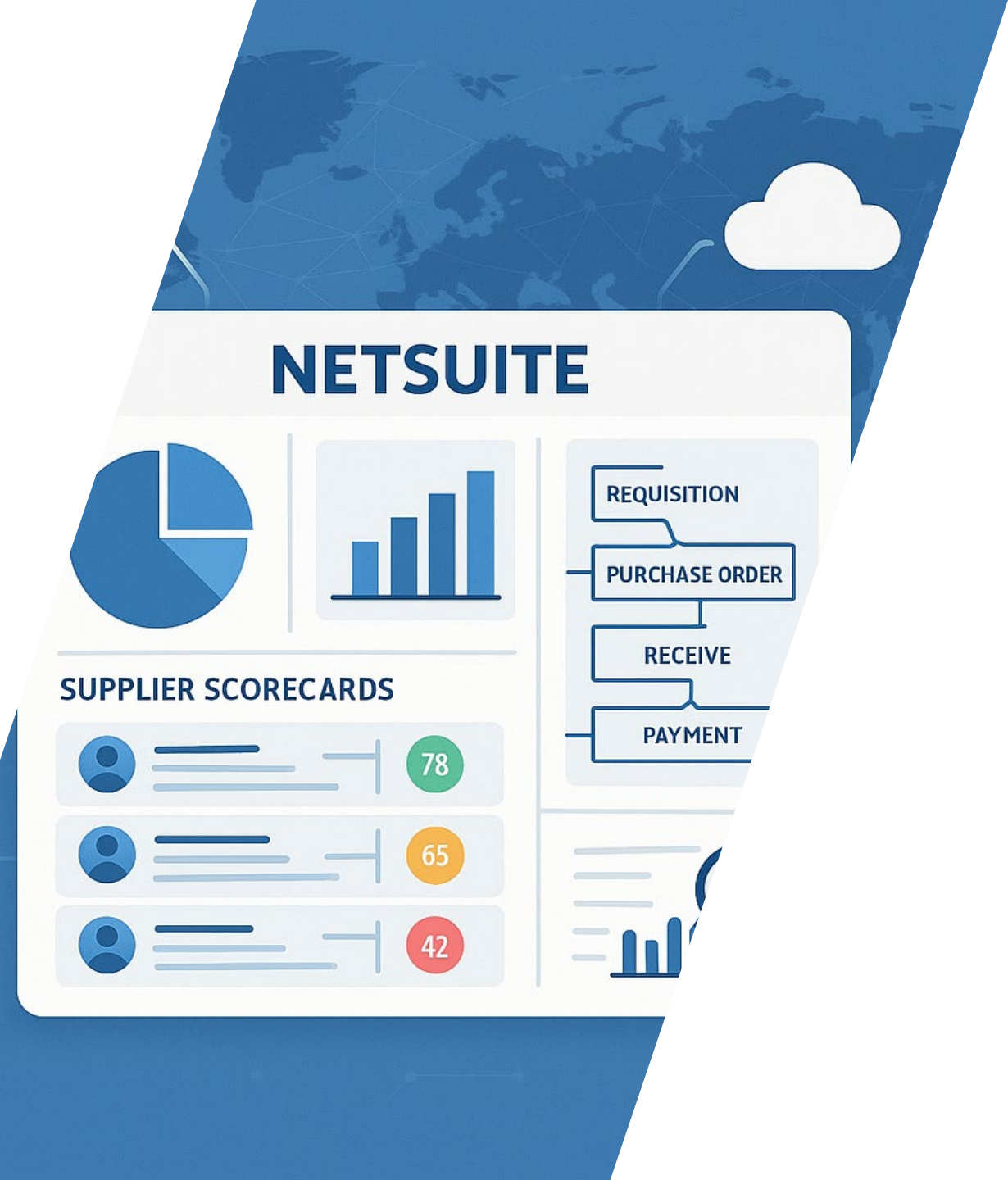
1. **Customer Lifetime Value (CLV)**
2. **Churn Rate**
3. **Net Promoter Score**
4. **Conversion Rate**
5. **Customer Acquisition Cost (CAC)**

"Get closer than ever to your customers. So close that you tell them what they need well before they realize it themselves."

– Steve Jobs

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NetSuite Features: CRM

Customer 360 Dashboard
Oracle NetSuite

Enhance visibility, personalization, & operational efficiency

Customer 360 Dashboard in NetSuite delivers a unified, real-time view of customer data across departments, empowering organizations to enhance engagement, streamline service, & drive retention. It consolidates financial, transactional, & behavioral insights into a single interface, enabling proactive lifecycle management. Key capabilities include:

- **Unified View**: Combines sales, support, finance, & marketing data into a complete customer profile
- **Activity Timeline**: Tracks deposits, refunds, orders, support cases, emails, & notes
- **Sales & CLV Insights**: Visualizes year-over-year sales & lifetime value to spotlight high-value customers
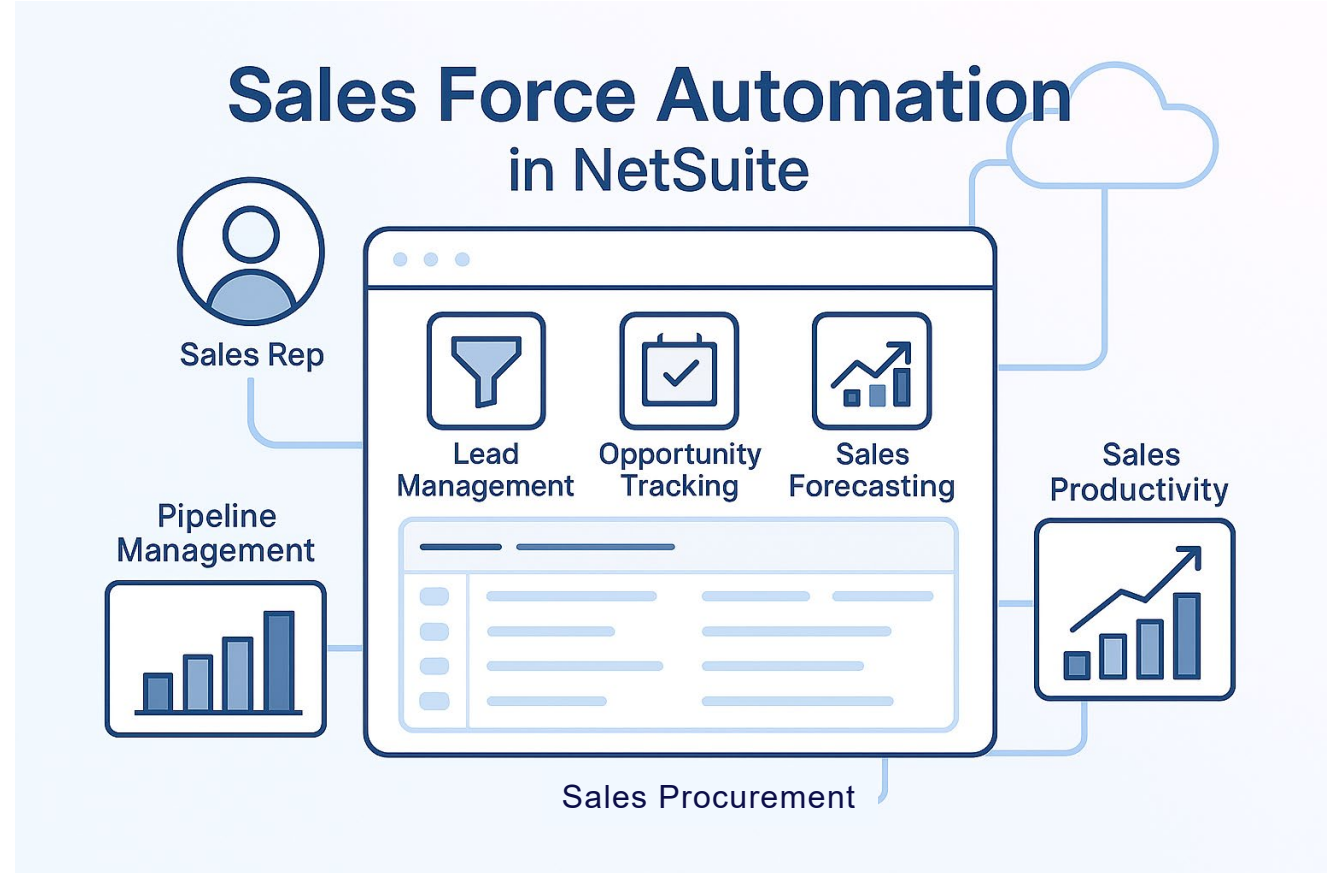
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Sales Force Automation
Oracle NetSuite

Accelerate growth & improve relationships

Sales Force Automation streamlines the entire sales cycle—from lead to order—on a unified cloud platform. It boosts productivity & engagement with real-time data, smart tools, & automated workflows. Key features include:

- **Opportunity Management**: Tracks deal stages, revenue, contacts, & documents
- **Quote & Order Management**: Automates quotes, pricing, discounts, & tax
- **Sales Forecasting**: Offers real-time forecasts with weighted probabilities & variance analysis
- **Lead & Territory Management**: Routes leads by rules & regions to improve conversion


Sales Force Automation in NetSuite

Sales Rep

Pipeline Management

Lead Management

Opportunity Tracking

Sales Forecasting

Sales Productivity

Sales Procurement

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Marketing Automation
Oracle NetSuite

Align marketing & sales

Marketing Automation in NetSuite streamlines & personalizes campaigns across channels—helping teams generate leads, nurture prospects, & align with sales. Key capabilities include:

- **Multi-Channel Campaigns**: Automates email, web, events, & social using customer data for relevance

- **Lead Capture & Routing**: Uses forms & lists to capture leads & route them based on rules

- **Segmentation & Personalization**: Targets messages using dynamic segments & CRM-based email templates
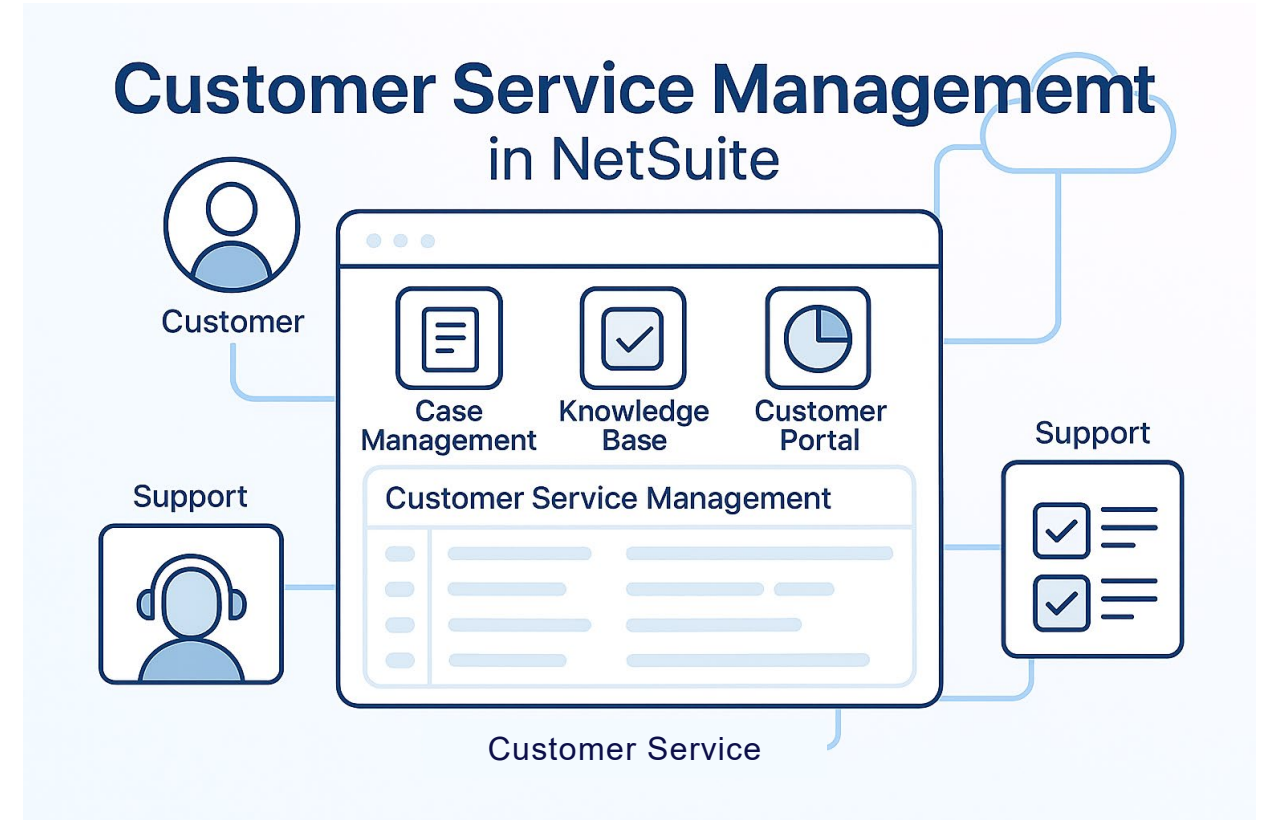
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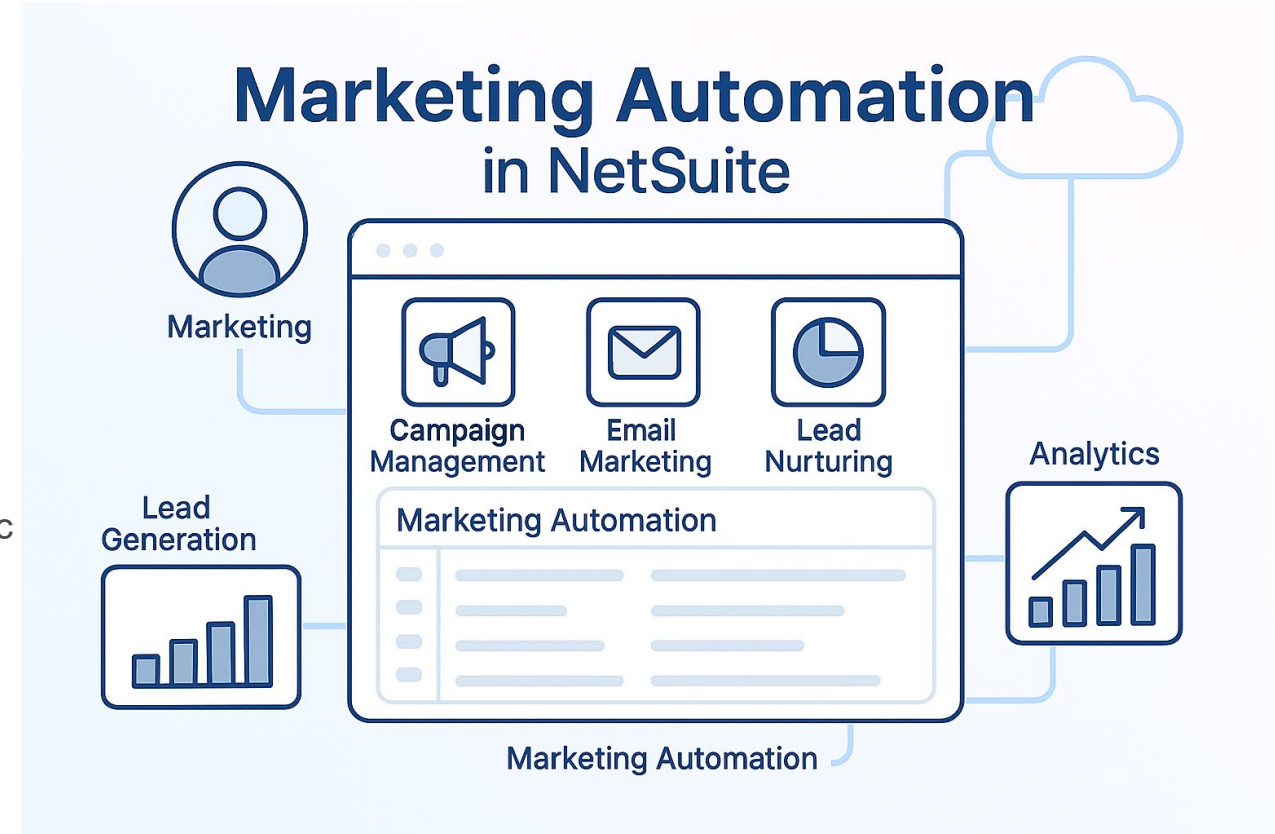
Customer Service Management
## Oracle NetSuite

Improve customer service

Customer Service Management in NetSuite provides a unified platform for efficient support & improved satisfaction. Integrated with NetSuite CRM, it provides real-time access to customer data across departments, enabling service teams to deliver high-touch experiences while reducing operational costs. Key features include:

- **Case Management**: Automates case routing & tracking across channels with built-in metrics

- **Customer Portal**: Enables self-service for support, orders, invoices, & returns

- **Knowledge Base**: Offers searchable help articles & videos to speed up resolutions

Customer Service Managememt in NetSuite

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Scenario Walkthrough: From Lead to Customer
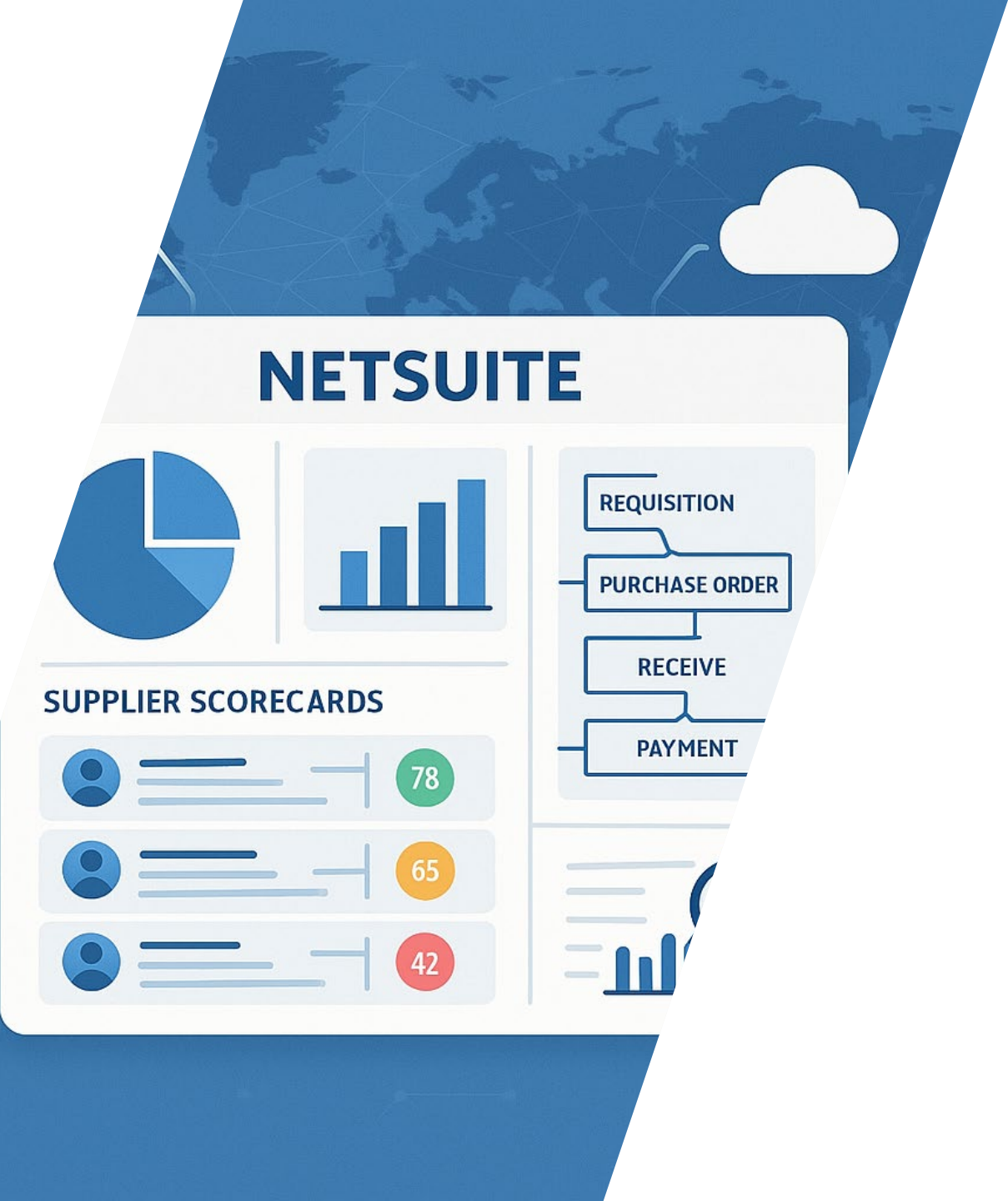
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Q&A & Wrap-Up

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