

30-Minute Checklist to Spot Gaps and Fix Inefficiencies

Instructions:

Use this checklist to complete a quick performance audit across your NetSuite environment. Check each box that applies, then review your results to prioritize where optimization can deliver the most value.

FINANCIALS & REPORTING

- ☐ Month-end close consistently completes in 5 days or less.
- ☐ Reports generate in under 60 seconds.
- ☐ Financial data is consistent across modules (no manual re-entry).
- ☐ Audit trails are clean, with no unexplained journal entries.

AUTOMATION & WORKFLOW EFFICIENCY

- ☐ Core workflows (invoicing, approvals, fulfillment) run without manual steps.
- ☐ Workflow success rate exceeds 99%.
- ☐ No recurring failed scripts or Celigo errors.
- ☐ All users understand automated processes and exceptions.

INTEGRATIONS & DATA FLOW

- ☐ Shopify, Amazon, and 3PL data syncs daily without intervention.
- ☐ No recurring EDI exceptions or order mismatches.
- ☐ Integration logs are monitored weekly.
- ☐ Manual data fixes are rare (fewer than 2 per week).

NetSuite Optimization Self-Audit



OPERATIONAL VISIBILITY

- ☐ Leadership dashboards update in real-time.
- ☐ Departmental KPIs are accessible within NetSuite, not spreadsheets.
- ☐ Saved searches and reports are standardized.
- ☐ No dependency on individual team members to “pull” data manually.

USER EXPERIENCE & GOVERNANCE

- ☐ Common tasks take fewer than 5 clicks to complete.
- ☐ Roles and permissions align with responsibilities.
- ☐ Team members have current training materials.
- ☐ No reliance on undocumented customizations.

INTERPRETING YOUR RESULTS

Count how many boxes you checked:

- **9 or fewer:** Your system’s under strain. It’s time to act with AlturaCare and restore peak performance.
- **10–15:** You’re doing well, but small inefficiencies are adding up. AlturaCare can help you fine-tune and scale faster.
- **16–20:** Excellent. Your NetSuite is running strong — stay proactive to keep it that way.

NEXT STEP: TURN INSIGHTS INTO ACTION

You’ve identified what’s working and where your system’s holding you back. Now it’s time to move from insight to improvement. Every new AlturaCare partnership begins with a HealthCheck — your blueprint for sustained performance and scale.



Scan the QR code to see how AlturaCare closes your efficiency gaps and keeps your system running at its best.