

GUIDE

# The data platform decision guide: **Key questions for finance and IT leaders**



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If you're a financial or IT leader for a growing company, you're likely grappling with the complexities of managing diverse data from enterprise resource planning (ERP) systems like **NetSuite**, customer relationship management (CRM) platforms like Salesforce or spreadsheets like Excel. Without the right approach to managing this data, your finance team may struggle to pull together timely reports while IT works overtime extracting information and preparing it by hand. In the meantime, you're left waiting for the insights you need to make critical decisions.

Selecting **the right data platform** is more than just a technical decision – it's a strategic choice that can either propel your organization forward or leave it mired in inefficiencies. This guide will help you think through your data management needs and learn about the attributes to look for when evaluating a data platform. It covers essential topics such as integration, scalability, usability, collaboration and support, helping you make key decisions based on both your immediate priorities and long-term strategic goals. Let's start with a brief overview of what a data platform is and what it does.

40% of CFOs around the world do not completely trust the accuracy of their organization's financial data.

-Blackline, Inc.



## What is a data platform, and why is it important?

A data platform is a centralized system that collects, organizes, transforms and delivers data from multiple sources to support business decision-making. It helps unify diverse data from ERP, CRM and other operational systems to make it more reliable, accessible and actionable, and it has four key components:

- ◆ **Data extraction:** These tools make it easy to export your raw data from systems such as NetSuite for self-service extraction, manipulation and analysis.
- ◆ **Managed data warehouse:** A managed warehouse provides ready-to-analyze datasets from sources like NetSuite and Salesforce. This is key to helping you maintain clean, organized and scalable data in your own environment.
- ◆ **Managed BI dashboards:** BI tools allow your teams to access full-service, industry-specific reports in platforms like Microsoft Power BI. Tailored dashboards and visualizations make it simple to analyze and share insights.
- ◆ **FP&A reporting:** These solutions streamline FP&A (financial planning and analysis) reporting by helping your teams build and update their own reports directly in Excel with real-time drill-back to NetSuite.



Extract



Managed Warehouse



Managed BI Dashboards



FP&A Reporting

Figure 1: The key components of a managed data platform



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By combining these elements, a robust data platform eliminates data silos, automates time-consuming tasks and delivers actionable insights, helping your teams make data-driven decisions quickly and confidently. Since choosing a data platform can feel complicated and overwhelming, we've assembled some key questions you can ask as you evaluate data platforms and their capabilities.

## Does your data platform integrate seamlessly with your existing systems?

If your organization relies on diverse data from multiple platforms to manage operations and reporting, **data integration** is likely a challenge. Without a data platform that can tie your systems together, they can become isolated and create data silos, hindering your decision-making. For instance, your finance team might need days to compile a report because the NetSuite data they need requires manual extraction and formatting, while your Salesforce data resides in a separate workflow. Without **the ability to unify these data sources**, you're bound to notice missed opportunities, inefficiencies and frustration in your operation.



### Key considerations for integration

The right data platform eliminates data silos by getting your data to flow smoothly across systems and providing stakeholders with a single source of truth. If your business wants to move quickly and make informed decisions, integration is more than a convenience – it's a necessity. Consider these features when evaluating your options:

#### ▶ Prebuilt connectors

Seamless integration begins with prebuilt connectors, which eliminate the need for custom coding to synchronize data between platforms. Our business intelligence solution, **ZoneReporting**, for example, includes over 350 prebuilt connectors to tools like Salesforce, Shopify and Google Analytics. This not only simplifies integration – it keeps your data synchronized to reduce the risk of errors and delays that come with manual updates. By **automating the data flow between systems**, prebuilt connectors also free up valuable time for your teams to focus on analysis and decision-making.

#### ▶ Customizable data exports

Exporting data efficiently is a challenge when you're dealing with complex systems like NetSuite. Without an effective solution, your teams can waste valuable time manually exporting and reformatting data, leading to delays and potential errors. An ideal data platform makes it easy to export your data to destinations such as Azure Blob, Amazon S3, SharePoint and OneDrive. **Tactical Connect**, for example,



supports a no-code interface and frequent refresh intervals as short as 15 minutes. This keeps your data current and accessible so your team can conduct more meaningful analysis and less tedious data management.

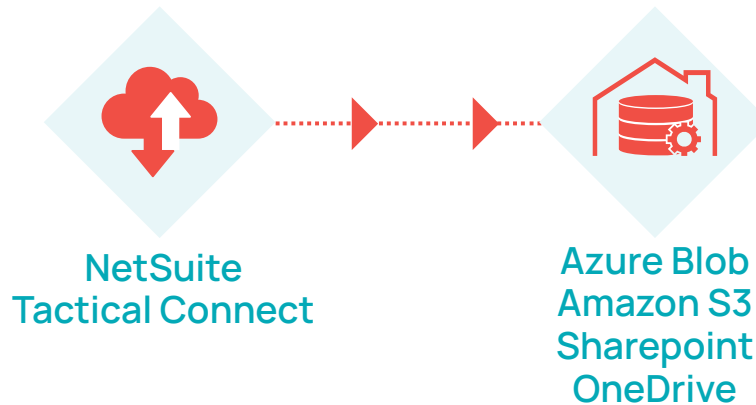


Figure 2: Tactical Connect helps you export NetSuite data easily to your platform of choice

### Unified data model

A unified data model is critical for creating a single source of truth across your organization. Without it, your business may struggle with inconsistent reporting, errors and inefficiencies. That's because data from multiple sources usually isn't ready for analysis if it's not extracted, prepared and transformed. To address this, look for a platform that can integrate data from multiple systems into a cohesive structured query language (SQL)-based framework. This makes your diverse data easy to analyze and creates a foundation for advanced use cases like forecasting and AI modeling.

### In summary:

By prioritizing seamless integration, your organization can eliminate inefficiencies, reduce manual effort and ensure that all stakeholders have access to consistent, reliable data. This creates a foundation for faster decision-making and more confident strategic planning.

## Can your data platform simplify reporting and analytics?

Without an effective data platform, you may find that manual processes and inaccessible data are creating gaps, delays and inaccuracies in your financial reporting. These challenges not only slow your decision-making but also undermine your team's trust in any insights they find.

Today, **98% of C-suite and F&PA pros** do not have complete confidence in the visibility their organization has over its cash flow.

-Blackline, Inc.



Visibility of cash flow is paramount



## Key features for simplifying reporting

The right data platform addresses these inefficiencies by automating repetitive tasks, enabling granular insights and providing tailored analytics around your specific business needs. From streamlining financial reporting to delivering actionable dashboards, **upgrading your reporting capabilities** with a robust data management solution empowers your teams to focus on what matters most: driving organizational performance. Here's what to look for:

### Automated reporting

A strong platform should automate the most tedious aspects of financial reporting, such as data extraction, formatting and updating reports. Look for tools that provide single-click data refreshes and minimize manual intervention. This helps you keep your reports up-to-date and consistent. Automation also helps you reduce errors while saving your team's valuable time so they can focus on strategic priorities.

### Prebuilt and customizable reports

If your data platform provides prebuilt reports tailored to common financial metrics and industry needs, it can save you significant time. These should come with options to customize layouts and formulas, so your team can quickly adapt them to fit specific business requirements. Rather than **building these capabilities by hand**, look for platforms that offer an extensive library of templates for financial statements, dashboards and forecasting models.

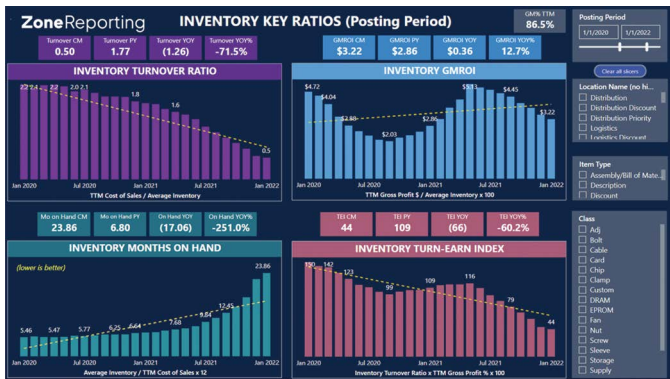
### Granular insights

Detailed analysis often requires the ability to drill down into transaction-level data from your ERP. The ideal platform allows your teams to query specific transaction lines to find answers, address discrepancies and solve problems quickly. This granular data also improves your team's confidence in the accuracy of reporting since they can typically find the supporting data they need with a few clicks.

### Industry-specific dashboards

Tailored dashboards can simplify complex data by focusing on key performance indicators (KPIs) and metrics that are specific to your industry. Whether you operate in **software-as-a-service (SaaS)**, **supply chain** or **project management**, a platform that offers ready-made, industry-relevant dashboards helps your teams uncover trends and make informed decisions faster.





**In summary:**

Keeping things simple means your data platform can streamline your workflows and enhance your team's ability to deliver accurate, actionable insights. The result is faster decision making, improved operational efficiency and greater trust in your data.



## Is the platform intuitive and accessible for all users?

A powerful data platform is only valuable if your users can easily access, navigate and leverage its features. For your finance teams and other non-technical stakeholders, steep learning curves or overly complex tools can hinder adoption, frustrate your employees and delay the platform's benefits.



### Key features for intuitive platforms

The right platform empowers your teams to access and analyze data with ease and without constantly relying on IT. This helps them work with greater independence and efficiency while accelerating the adoption of your data platform. Here are a few capabilities to look for:

▶ **Excel-friendly tools**

Your finance professionals are likely already working with spreadsheets, using them daily for reporting and analysis. That's why it makes sense to look for a data platform that can create and publish **up-to-date financial reports** in Excel based on your NetSuite data. Companies like **ConGlobal** and **Commvault** have shown how the right data platform can make it fast and accurate to produce consolidated financial reports in Excel using ERP data.



## ConGlobal Streamlined Multi-Entity ERP Reporting with Zone's Solution 7

ConGlobal, a leading intermodal solutions provider, faced significant challenges in producing presentation-quality financial reports across its numerous entities. Their existing ERP reporting processes were inefficient, requiring extensive manual work and a patchwork of tools to consolidate data. This led to delays, inconsistencies and difficulty in maintaining high-quality reporting standards needed for stakeholders.

By implementing Zone's Solution 7 and leveraging its deep integration with NetSuite, ConGlobal achieved a dramatic transformation in its reporting process. With Solution 7, they automated multi-entity data consolidation and enabled real-time reporting directly in Excel, eliminating the need for manual data exports and reformatting. This improved efficiency, reduced errors, and ensured uniformity across reports. The key outcomes included a **60% reduction in reporting time, enhanced data accuracy, and the ability to produce professional-grade reports on demand**, empowering ConGlobal to focus on strategic business decisions with confidence.

**FASTER PRESENTATION-QUALITY NETSUITE REPORTS**

Solution 7 allows ConGlobal to easily create attractive, real-time financial reports from financial data in NetSuite.

When you're the finance department for a \$400 million global company, your work revolves around tracking your company's finances - and ensuring your stakeholders in the know receive compelling presentation-quality reports. After all, executives, the board of directors, operators, as well as banks or creditors need easy-to-understand financial information to make the best strategic decisions.

ConGlobal's finance department has relied on NetSuite Creative to manage its finances and operations since 2008. NetSuite tracks the finances for multiple subsidiaries in three countries, all in their native currency. By 2016, the team was looking to improve financial transparency and decision-making by creating more reports for stakeholders.

"NetSuite excels in producing 'MYOB' reports with the ability to drill through to the detailed level our boards, former Chief Financial Officer, ConGlobal CFO, "we wanted to also create presentation-quality reports, with graphs and charts, using the language we speak in the back office - Microsoft Excel."

**Creating more Reports in the Same Amount of Time**

"With Solution 7, the ConGlobal finance team now has far more reports," said Burwell, "where previously we could find the time, then, in the same amount of time, we are writing more reports and have more resources to focus on accuracy, formatting, design, and so on."

The company has three divisions comprised of 22 legal entities. Not only can ConGlobal create consolidated statements for each division, it can report on information across multiple divisions. For example, it creates reports that look at total income.

Individuals can use these templates without modification for their own reporting or alter them as the basis for creating new reports. In addition to the standard capabilities that come with Solution 7, ConGlobal also selected Zone's "new" reporting capabilities. Working closely with ConGlobal, Solution 7 created brand new Solution 7 lists and functions to update them from custom NetSuite fields and reports from ConGlobal that existed as part of their NetSuite implementation.

**More Complex Questions, Faster Answers**

Solution 7 pulls data from NetSuite in real time. Because of this, the finance department can create reports to answer any question their executives, members of the board of directors immediately without having to wait for a spreadsheet.

With Solution 7, ConGlobal is able to schedule reports for distribution, and leaves the freedom to easily alter the schedule, putting out reports that are completed earlier or later than the scheduled time. Because the solution is based on Excel, which is part of the Microsoft Office suite, it is the only tool for the finance team to pull reports into their own spreadsheets to create presentations. As Burwell commented, "The whole process of reporting is now very powerful and intuitive. We can sit down and use it all day, we already know, Microsoft Excel. So we can create quality reports, complete with charts and graphs, have a refresh, do calculations and take it all very simple, really!"

LEARN MORE AT [WWW.SOLUTION7.CO.UK](http://WWW.SOLUTION7.CO.UK)

Winner of SuiteApp of the Year, Solution 7 gives Excel users the tools to effortlessly build and publish high-quality, interactive, real-time financial reports and financial forecasts with full drill-down and drill back to NetSuite.

**solution7**  
Excel Financial Reporting  
by Zone

[Read the Case Study here](#)

### No-code interfaces

A no-code interface allows your users to customize workflows, create reports and configure dashboards without needing IT intervention. For instance, platforms are available that include visual builders for designing reports or workflows, even offering pre-built templates for common use cases. This helps non-technical users access and manipulate data easily and confidently, even in complex scenarios.

### Quick onboarding

The best platforms reduce the complexity of setup and adoption, helping users across teams get started without long learning curves or extensive technical intervention. Look for solutions with guided implementation, pre-built templates and user-friendly interfaces that allow teams to access insights within days or weeks, rather than months. By making sure your data platform is easy to use, you can also improve adoption among your teams, helping your organization take full advantage of the insights it provides.

### In summary:

An intuitive and accessible data platform accelerates adoption and helps your teams analyze data confidently – without IT dependence. By prioritizing tools that integrate with familiar workflows, simplify customization and are easy to learn, you can empower your teams to work efficiently and deliver insights faster.



## Will the platform scale with your business and help you innovate?

As your business grows, so will your data requirements. A platform that works for your current needs might not keep up with larger data volumes, complex workflows or advanced analytics demands in the future. This can lead to challenges such as slow performance with increasing data sizes, limitations in integrating new data sources and inadequate support for advanced technologies like AI and machine learning.



### Key features for scalability and innovation

The right data platform not only handles your current data needs but also positions your business to adapt to future growth and innovation. Whether it's managing billions of rows of data or supporting cutting-edge analytics, the right platform keeps your operations efficient while providing actionable insights for your team. Here are some features to look for to be sure your data platform is ready for tomorrow:



#### Scalable architecture

A data platform must be built on a robust, scalable infrastructure to handle growing data volumes and complex operations. Look for **a data warehouse solution that can handle massive datasets**, maintain high performance even as datasets expand and keep your critical business operations up and running. Cloud-based hosting solutions, such as those built on Microsoft Azure, are excellent for ensuring reliability and scalability.

### Zone Data Warehouse includes...

<b>99.9%</b>	<b>Uptime</b> for uninterrupted access to critical data
<b>6B</b>	<b>6 billion</b> rows of data managed and refreshed by Zone Data Warehouse
<b>10T</b>	<b>10 terabytes</b> of data are transformed and accessed by customers
<b>75+</b>	<b>Customers trust</b> Zone Data Warehouse
<b>2+</b>	<b>Data models</b> (NetSuite and Salesforce) are managed and ready to integrate

Figure 3: Zone Data Warehouse scalability in focus



### ▶ **Advanced analytics and AI integration**

The future of data lies in advanced analytics, AI and machine learning. Platforms that integrate with tools like Snowflake, Redshift, Google BigQuery or similar technologies make it easier to apply predictive models, automate processes and extract deeper insights from your data. For example, a Snowflake integration provides the framework you need to set up a predictive model that forecasts your cash flow based on historical data.

### ▶ **Continuous updates and innovation**

A platform should evolve with your business needs. This includes regularly updating managed datasets, adding support for new data sources and refining existing capabilities based on user feedback. Frequent updates keep your platform relevant and aligned with the latest technological advancements, helping your business do more with its data over time.

### **In summary:**

By choosing a platform that scales with your business and supports innovation, you can future-proof your data strategy. This investment ensures that your data infrastructure remains a strategic asset that can help your organization grow and innovate without the constraints of outdated technology.

## Does the platform improve collaboration across teams?

Collaboration is essential for keeping your finance, IT and operational teams aligned, yet many organizations struggle with siloed data, disconnected workflows and outdated information. Without a centralized platform, your teams may duplicate efforts, face delays or work with conflicting insights. Addressing these challenges requires a unified approach that gives your teams seamless, managed access to the data they need.



### **Key features for collaborative platforms**

A truly collaborative platform does more than simply share data. By integrating features like unified reporting, self-service tools and streamlined workflows, your platform can bring cross-functional teams together – efficiently and without inflating costs. Below are the essential features to look for in a collaborative data platform:



### ▶ **Unified reporting**

A robust platform offers **pre-built integrations** for systems like NetSuite, Salesforce and others that allow you to easily generate unified, insightful reports. For example, you can access a dashboard that combines data from multiple sources into a visual gross margin analysis, a comparison between lifetime customer value and customer acquisition costs or a supply chain report that helps you accurately forecast your stock levels.

### ▶ **Self-service capabilities**

Collaboration works best when teams can independently access and manage their data without relying on IT. Look for platforms that include role-based access to shared datasets, drag-and-drop report builders and automated workflows. For example, a data portal with granular permissions might allow your marketing team to independently build a campaign performance report using combined insights from your CRM and ERP systems – without manipulating live data or involving IT.

### ▶ **Streamlined report sharing**

When you automate how reports are shared, you can build consistent insights into your operation. Some data platforms offer subscription-based reporting, which allows stakeholders to subscribe to the reports they need. For example, your finance team might subscribe to weekly revenue updates, while operations might receive an automated inventory alert when a large sales order is generated.

### ▶ **Cost-effective access**

Platforms that require additional licenses for every user can make sharing insights across your teams prohibitively expensive. Instead, seek platforms that provide report sharing and cross-departmental collaboration without requiring additional ERP licenses. We believe the best systems use business intelligence software for reporting and analytics since they combine data from multiple systems in flexible, visual dashboards.

## **In summary:**

When it comes to your data, collaboration is key. The right platform breaks down silos and gives your teams the insights they need to make data-driven decisions based on a single source of truth – without burdening your budget.



## Is the platform well-supported?

Even the most advanced solutions can fall short without support and expert guidance. Think about the challenges that may arise when you implement a new data platform – from navigating complex integrations to ensuring your teams know how to use its features effectively. Without access to reliable support, your organization might experience slow adoption, frustrated users and underutilized tools.



### Key features for exceptional support

A strong support framework doesn't just help you resolve issues – it empowers your teams to maximize the platform's value over time. Whether it's during initial implementation, ongoing usage or when you're scaling the platform to meet new demands, reliable support is a critical success factor. Here are the key elements you can look for in a quality support program:



#### Implementation assistance tailored to your needs

A seamless onboarding process is critical to unlocking your data platform's value quickly. Look for providers that offer multiple levels of implementation support, such as guided setups for straightforward needs or comprehensive deployments for complex organizations. Tailored onboarding options help you get up and running efficiently while making sure the platform meets your operational goals right from the start.



#### Flexible training and knowledge options

One of the keys to driving adoption for your data platform is making training and knowledge accessible. Choose platforms that offer live and on-demand training sessions, role-specific materials for finance or IT teams and an extensive knowledge base. These resources help your teams build expertise, troubleshoot effectively and continue learning without depending entirely on external support.



#### Customizable ongoing support

The best support programs anticipate your needs and evolve with your business. Look for platforms with customized support options, such as basic plans for day-to-day assistance or premium plans with dedicated account managers. Professional services, whether you use them on a recurring or on-demand basis, are also valuable if you need help customizing reports, optimizing your data platform or integrating with a new system.

### In summary:

By choosing a platform with comprehensive support, your teams can gain the confidence they need to adopt new tools, the knowledge they need to maximize their effectiveness and the resources they need to navigate challenges seamlessly. That means faster adoption, higher return on investment (ROI) and a platform that grows with your business.



## Decide on a data platform with confidence

Choosing the right data platform is more than a technical upgrade – it's an opportunity to transform your organization by getting your data to work more effectively and efficiently for your business. The right solution can help you break down silos, simplify workflows and empower your teams to make faster, more informed decisions.

Making the right choice in a data platform begins with the right questions. Take the time to evaluate your options carefully – and look for a solution that can grow with your organization while meeting today's challenges head-on.

**If you'd like to learn more about how our data platform can help your teams deliver trusted insights, improve efficiency and drive smarter decisions for your business, we're here to help.**

Book a demo today ▶



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