



## BTM GLOBAL AND NETSUITE

Oil and Chemical Company  
Fuels Efficiency with BTM Global  
and NetSuite

Sunita Hydrocolloids Inc., USA ([SHI](#)) is an innovator in oil field chemical technology, producing and providing a complete line of stimulation chemicals to the North American, South American, and Middle East markets. Its subsidiary, Sunita Logistics and Transportation (SLT), specializes in last-mile trucking needs for the oil industry.

### **Challenge: Improve Visibility and Alignment**

Sunita sought a robust and intuitive ERP system to support smoother order processing, including real-time visibility for better inventory management, more timely financials, and more efficient dispatching for SLT orders. The company was spread thin over multiple platforms that weren't synchronized, causing a ripple effect that impacted work across finance, sales and operations.

A better ERP would also further elevate Sunita's reputation for service and better align processes across its business units and various Texas locations.

### **Solution: Out-of-the-Box Power, Flexible Customizations**

"We wanted an ERP system to include more than just finance and procurement," said Dominic Affonso, CFO of Sunita. "NetSuite could benefit us in many areas of the company and grow along with us."

### **QUICK FACTS**

- Oracle NetSuite ERP for Oil & Gas
- Implementation as close to base as possible
- Significant automation, efficiency and speed improvements
- Eliminated knowledge silos
- Tasks that took hours now done in minutes

BTM Global, an Oracle NetSuite Alliance Partner well-versed in the oil and gas industry, was chosen to lead the [NetSuite ERP implementation and integration](#).

“We wanted to stay as close to base as possible, and the BTM team were experts in both NetSuite best practices and in extending NetSuite with customizations to fit our needs,” said Affonso.

BTM’s work included:

- Implementation, consultation and training on NetSuite best practices for the IT team and Sunita leadership
- Implementation of NetSuite Fixed Asset Module
- Configuration of NetSuite processes
- Data migration, including historical trial balances, all status data, transactional data and all fixed assets
- Customizations as needed, such as tiered pricing, oil pad scheduling, a custom price book to keep all historical quote data, and the automation of logistics’ order requirements

BTM provided both on-site and remote training on the NetSuite ecosystem. “The on-site training with our team was very valuable,” said Affonso. “It allowed the team to interact with the system and ask BTM questions in real time.”

Sometimes, Affonso noted, smaller companies can be intimidated by the presumed scale of an ERP implementation. He has no regrets about Sunita’s choice of BTM Global and NetSuite.

“We found an ERP and implementation partner that really worked for us,” he said. “With BTM, the whole project took six months until we were solidly on our own two feet.”

## **Results: Aligned for Growth**

Since go-live, Sunita has improved automation and sped up key financial and operational processes to elevate the customer experience and drive growth.

### **Set up for success**

The collaboration with BTM has been an excellent partnership, and NetSuite has been an excellent solution, said Affonso. “BTM understands our challenges and they come with a solution. They also push back appropriately and challenge us to think about the bigger implications of our decisions, which I really appreciate.”

One of BTM’s biggest impacts was setting up a CRM in NetSuite. Previously, each salesperson manually produced a weekly report that a sales manager would cut-and-paste into another report. Today, that process is automated and accurate with real-time sales details. In addition, the CRM:

- Tracks customer interactions from start to finish
- Is the central location for all customer information, enabling easy knowledge transfer
- Eliminates manual work for producing customer quotes

“BTM did a phenomenal job configuring CRM,” said Affonso. “Our sales personnel know in real time how they’re performing against goals, and leadership always has an accurate picture of sales performance rather than relying on reports that are days old.”

### **Leaps in visibility, speed and ease**

With the powerful NetSuite platform, Sunita has eliminated most spreadsheets. Teams work from a single source of information with views into sales, inventory, and financial data.

Across business units, financial operations have been significantly streamlined and consolidated into one platform that includes:

- Real-time visibility into revenue booking and costs
- Timely and accurate inventory information so the company knows what's needed and when
- Accurate ledgers
- Fast, automatic reporting rather than manually compiling reports from multiple systems
- Improved internal controls and segregation of duties
- Because of the ease of access and visibility, price requests are now completed in about 15 minutes rather than several hours
- Sunita's operational team in Midland, Texas is tightly aligned and synchronized with the company's finance operations in Houston.

"We had unique conditions, such as scheduling for remote oil pads and specific reporting data. BTM Global helped us meet all of those requirements, as well as create custom roles so that our small team can accomplish all of their work in NetSuite. BTM ensured that NetSuite could meet our needs and make our work much more automated, seamless and detailed," said Affonso.

The ease and visibility have impacted employees across the company. For instance, SLT drivers and other relevant individuals can view client orders in NetSuite. With access to this accurate information and reporting, the volume of emails has decreased, as have the number of manual data updates needed.

BTM Global also created custom pricing tables along with the ability for Sunita to attach bills of lading to an invoice.

"For me, I don't have to rely on other staff for the information I need to do my job; I can make quicker decisions," said Affonso. "In addition, our CEO has better visibility into the company's results."

#### **Inventory management**

Sunita has improved inventory tracking across company warehouses and 3PL partner facilities.

"We can quantify what products are moving faster, as well as price products more accurately as all elements are available in one system," said Affonso.

Inventory tasks were previously labor-intensive and required gathering information from several systems. Now, the operations team can provide real-time information for bills of lading and goods received, as well as GR/IR.

#### **Growing with NetSuite**

NetSuite is a flexible platform that will support Sunita throughout its growth. Affonso also hopes to leverage BTM and NetSuite to build a pricing module for easier pricing and quotes. In the meantime, Sunita is adding an HRM module.

"We'll use the module for human resources, people planning, payroll, performance reviews, and expense report management," he said. "That will be important for us as we move into a new facility and expand our team."

**Find out more at [btmglobal.com](http://btmglobal.com)  
Contact us at 612-238-8800**

