

CohnReznick 

From readiness to results

**A practical path  
to agentic ERP**





# Introduction

This 90-Day Roadmap provides a practical, phased approach to help organizations move forward with implementing an AI-embedded ERP with confidence. It focuses on reducing risk early, activating AI by design, and building the trust needed to scale and sustain results.

NetSuite's embedded AI capabilities provide a powerful opportunity, but implementation requires more than just turning on new features. The next generation of NetSuite embeds conversational AI and agentic workflows across the suite to transform how AI works for business. But first, make sure your business is ready for AI.



**Days 1-30**

## **Establish readiness & guardrails**

**Objective:** Establish a strong foundation for a safe, confident AI transformation by validating readiness, reducing risk, and setting clear guardrails.

This first phase is intentionally narrowly focused. An experienced team evaluates data quality, system readiness, and existing risks while exploring AI-enabled capabilities. The goal is to understand where AI can deliver value, where guardrails are required, and how governance, compliance, and integrations can work together.

DAYS 1–30

## Establish readiness & guardrails

### ■ What to focus on

- Creating shared clarity across finance, operations, IT, and risk
- Understanding where AI can support decisions versus where controls must lead
- Identifying structural gaps that could undermine automation or intelligence later

### ■ Priority foundation activities

- Review data quality, accuracy, and ownership across core processes
- Assess current and potential AI-enabled system use cases
- Identify and prioritize operational pain points and manual work
- Review segregation of duties, permissions, and regulatory policies
- Map integrations across technology, processes, and workflows

### ■ Why it matters

Confidence in AI starts with trust. By addressing data, risk, and governance upfront and building in testing each step of the way, organizations reduce uncertainty, protect momentum, and create a foundation that supports faster, safer progress in the phases that follow.



Core to the NetSuite Next user experience is Ask Oracle, a natural language assistant that enables users to search, navigate, analyze, and act across the entire NetSuite dataset using their own words. When you can ask any question, it is even more critical to make sure that your processes, controls, and operations are aligned so you get the right answers.

DAYS 1–30

## Resource

Gain a clear, early signal of whether your organization is safe to proceed with AI by validating foundational readiness across data, culture, and operational activities.

### AI readiness & risk alignment key questions

#### Data readiness



*Do we trust the data AI will rely on?*

- Do we have named owners for core financial and operational data?
- Is decision-critical data accurate, current, and consistently defined?
- Where are we still correcting data outside the system and why?
- Can AI-assisted insights be explained and traced back to reliable data?
- Would leadership act on these insights with confidence?

**Data is reliable, owned, and trusted**

#### Culture & risk mindset



*Are people ready to use AI responsibly?*

- Do teams know where AI supports decisions vs. where human judgment leads?
- Is governance viewed as an enabler, not a blocker?
- Are users comfortable challenging AI-assisted outputs?
- Do leaders model transparent, responsible AI use?
- Would risks be escalated early or worked around?

**AI with guardrails is trusted and viewed as a strategic tool**

#### Operational readiness



*Are processes and controls ready for AI-assisted execution?*

- Have we clearly defined where AI will (and will not) be used first?
- Are approvals, permissions, and duties aligned to automation?
- Which processes are ready for AI and which require redesign?
- Are integrations stable enough to support AI-driven, real-time insights?
- Is ownership to remediate clear when AI flags an exception?

**Processes, controls, and escalation path are clear**

If you can confidently answer these questions, your organization is positioned to proceed with an AI-enabled ERP deliberately and safely. Gaps you identify help focus your Day 1-30 priorities.



**Days 31-60**

## **Activate & enable**

**Objective:** Translate readiness into business impact by enabling AI-assisted capabilities in targeted, high-value areas while reinforcing guardrails, adoption, and repeatability.

With the foundation in place, organizations begin rolling out AI-assisted capabilities to operational users in selective, high-impact scenarios. This stage emphasizes introducing features systematically, training users on guardrails, and establishing repeatable adoption patterns.

At the same time, a core team continues to push boundaries by addressing priority pain points and identifying opportunities where AI can drive meaningful operational improvement.

## Activate & enable

### ■ What to focus on

- Activating AI where it can create visible business value
- Reinforcing trust through transparency, training, and controls
- Establishing repeatable patterns for safe AI adoption

### ■ Priority enablement activities

- Target high-impact processes for AI-enabled re-engineering
- Introduce AI-assisted features in controlled, well-defined areas
- Configure dashboards and exception alerts for visibility and oversight
- Train end users on new workflows, guardrails, and escalation paths
- Launch internal focus groups to gather feedback on AI usage and impact

### ■ Why it matters

This phase proves that AI can move from concept to capability. By enabling users thoughtfully and focusing on real operational wins, organizations build credibility, accelerate adoption, and create momentum that leadership and teams alike can trust.

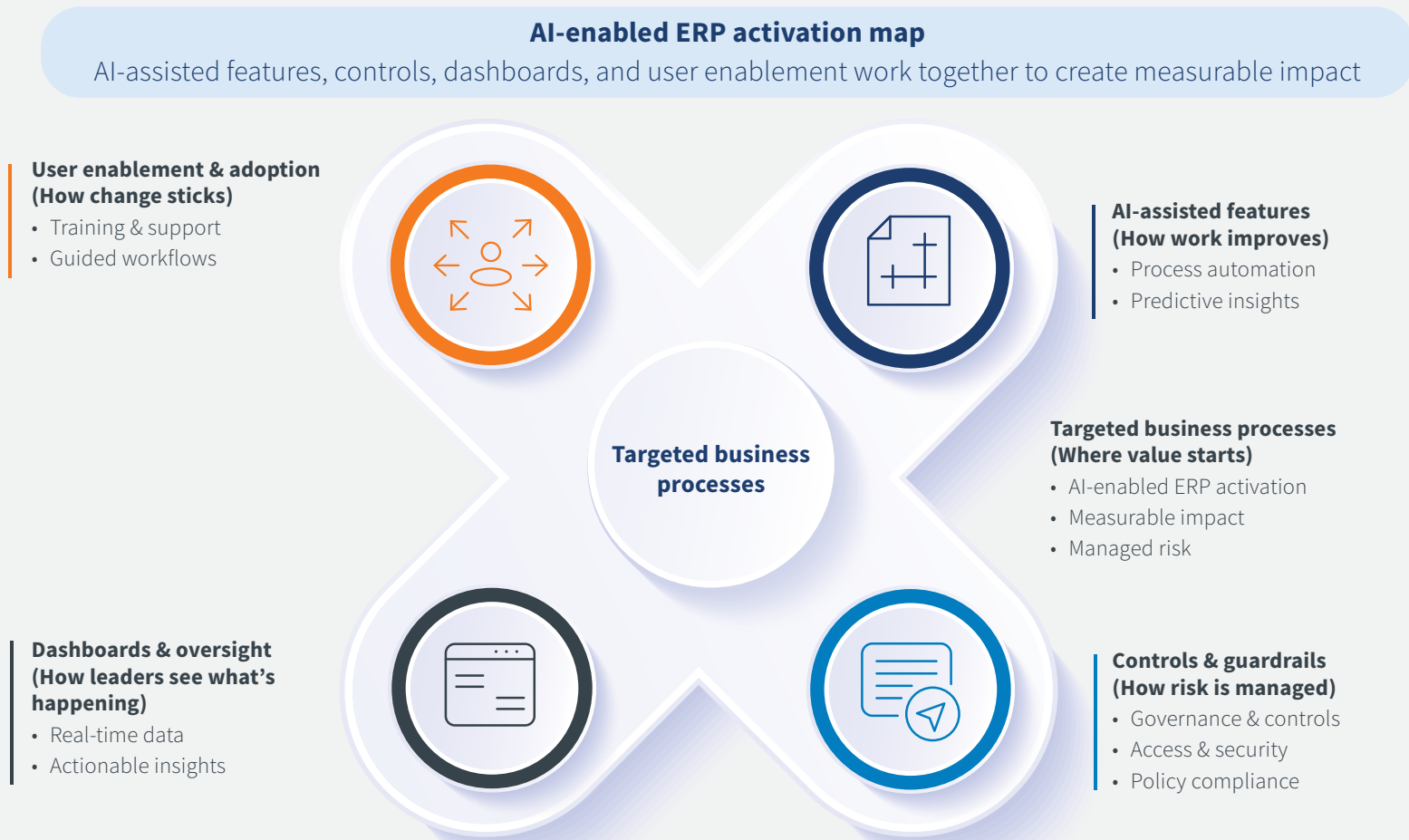


**NetSuite SuiteAnalytics reporting and dashboard solution provides built-in, real-time reporting, searches, key performance indicators, and dashboards. But your analysis is only as good as your data sources. Make sure your data is AI-ready so your insights on performance across your organization is accurate and trustworthy.**

# DAYS 31-60

## Resource

AI-assisted features are activated in targeted processes with controls, visibility, and user enablement embedded from the start so measurable impact is achieved without increasing risk.



As you move forward with activation, AI-enabled ERP capabilities are delivering visible operational wins while maintaining transparency, accountability, and control.



**Days 61-90**

## Optimize & build confidence

**Objective:** Scale what's working and embed AI as a sustainable, governed capability, expanding impact through integrations, automation, and AI agents while formalizing continuous improvement.

In this final phase, organizations move beyond early use cases to optimize and extend value. Teams scale successful capabilities; introduce more advanced enhancements, such as integrations, automation, and AI agents; and formalize continuous, AI-enabled improvements. By this stage, leaders are monitoring outcomes, measuring productivity gains, and building confidence in AI as a durable part of how the business operates.

DAYS 61-90

## Optimize & build confidence

### ■ What to focus on

- Scaling proven AI-assisted capabilities across the business
- Advancing from features to integrated, agent-driven workflows
- Establishing measurement and feedback loops for sustained improvement

### ■ Priority enablement activities

- Build integrations and enhancements augmented by AI
- Deploy AI agents to support decision-making and execution in targeted areas
- Formalize continuous, AI-enabled improvement processes
- Monitor outcomes, productivity gains, and risk indicators

### ■ Why it matters

By Day 90, organizations gain confidence that the capabilities of an agentic ERP are governed, measurable, and scalable, enabling leaders to continuously improve performance while maintaining control.



NetSuite Next is grounded in your data and existing controls, combining a unified data model with explainable, auditable AI to deliver an experience that's designed around how you work and what you need. With guardrails in place and your processes, data, and people aligned, NetSuite can support you as you scale.

# DAYS 61-90

## Resource

Dashboards can give you confidence that your ERP AI capabilities are delivering measurable value without increasing risk and provide clear signals for where to optimize, course-correct, or scale.

### AI-confidence dashboard framework

Tracking value, productivity, and risk to guide optimization

Efficiency gains | AI output quality | Risk exposure | Policy compliance

#### Value & risk signals



#### Data optimization

- **AI-driven data cleanup**
  - Duplicate resolution
  - System reconciliation
- **Data integrity monitoring**
  - Anomaly detection alerts
  - Exception tracking
- **AI-based threat detection**
  - Inaccurate AI assumptions in ERP decisions
  - Data drift impacting AI-enabled ERP outputs

➤ Data quality: Improving  
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➤ Risk posture: Controlled



#### Culture & engagement

- **Champion enablement**
  - Peer-led AI training
  - Power user coaching
- **User education & awareness**
  - AI limitations & assumption bias
  - When to validate, escalate, or override AI output
- **Adoption & consistency**
  - Expanding AI use
  - Role-based adoption

➤ AI adoption: Growing  
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➤ Behavioral risk: Managed



#### Operational oversight

- **Research & analysis**
  - AI-enabled insights
  - Human review points
- **Exception monitoring**
  - Alert response & audits
  - Incident reviews
- **Targeted AI enablement**
  - Task augmentation & automation
  - Back office matching

➤ Operational efficiency: Improving  
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➤ Control & oversight: Maintained

Optimizing AI use | Managing risks | Establishing effective use

By days 61-90, you should see measurable improvement in performance, visible risk control, and increasing confidence in AI-enabled operations. This dashboard becomes the decision-making backbone for scaling AI within your ERP and continuously improving results.



**Days 90+**

## Scale & sustain

Day 90 is not the finish line. It marks the transition from initial optimization to continuous advancement. With proven capabilities in place, organizations can continue to extend an ERP like NetSuite by scaling AI agents, refining integrations, and expanding automation to support evolving business needs.

Moving forward, the emphasis shifts to sustained value: regularly reviewing outcomes, incorporating lessons learned, and identifying new opportunities where AI can safely improve performance and scale as your business grows.

DAYS 90+

## Resource

To scale your use of an agentic ERP, you need a clear view of whether AI, data, and automation are scaling responsibly, delivering sustained business value, and remaining aligned with risk and governance expectations as the organization evolves.

### Scale & sustain for enterprise impact

AI is embedded in the ERP. The focus is on sustaining performance, governance, and value at scale.

### Sustain & scale



#### Integrated data

##### Reconciled & continuously trusted

- Are systems fully integrated, not point-to-point?
- Is data reconciling daily or weekly with minimal effort?
- Are anomalies and data drift detected automatically?
- Are exceptions routed and resolved consistently?
- Can leaders act on AI insights without rework?



#### Governed culture

##### Accountable & enterprise-wide

- Is there a central AI council overseeing initiatives?
- Are AI investments aligned to business strategy?
- Do departments meet regularly to review AI use?
- Are outcomes shared through governance forums?
- Is accountability clear as AI scales?



#### AI-embedded activities

##### Execution across the business

- Are manual tasks largely automated or augmented?
- Is remaining manual work value-adding and defined?
- Are AI tools embedded into core workflows?
- Is AI guiding prioritization and exception?
- Do teams focus on oversight, not data tasks?

### Sustainable enterprise operations

AI is a core capability across data, governance, and execution

AI-enabled capabilities are now embedded into core operations, continuously monitored and improving outcomes. The focus remains on retaining confidence that risk, controls, and accountability are scaling in step with value.

# How this roadmap connects readiness to results

Integrating an advanced AI-embedded ERP like NetSuite succeeds when progress is intentional, confidence is built early, and value compounds over time. This roadmap is designed to help leaders align teams, manage risk proactively, and build confidence as capabilities expand.

With a clear path forward, each step builds on the last, turning readiness into measurable outcomes and enabling organizations to move faster with control and purpose.

## Next steps

- Review this roadmap with key stakeholders
- Align on near-term priorities and ownership
- Advance with Next safely, confidently, and intentionally

**Book an AI-readiness discussion |  
Advance your ERP |  
See if NetSuite is right for you |**



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