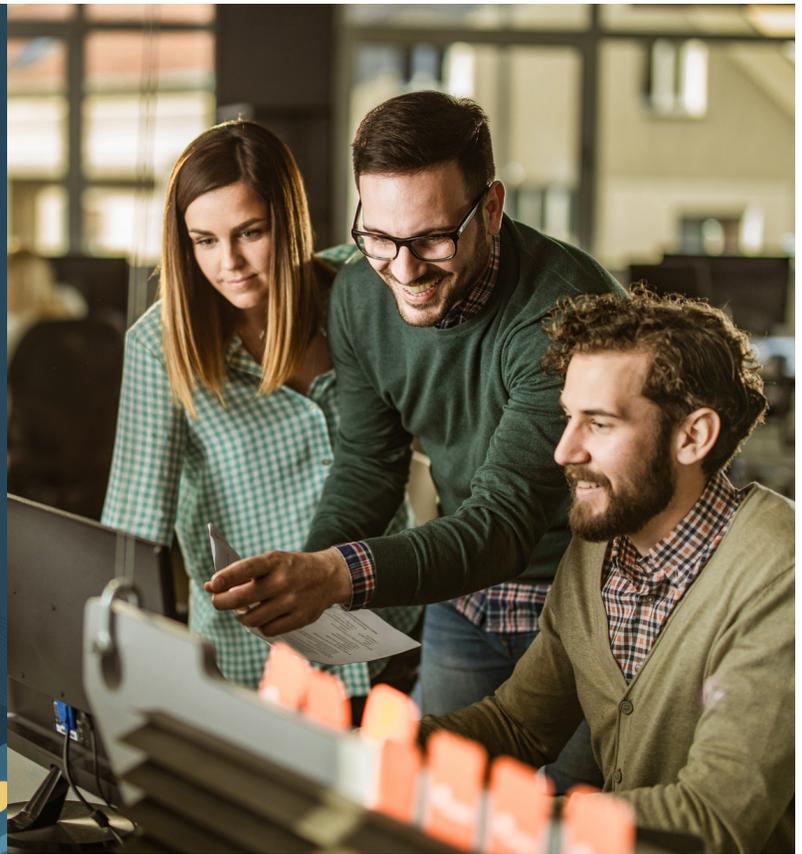




## SaaS Provider VitalEdge Improves Billing Efficiency 13x, Nets \$450,000 in Additional Revenue



VitalEdge Technologies is a leading global provider of integrated SaaS solutions for heavy equipment dealers in industries such as agriculture, forestry, mining, construction, and materials handling. Named to the 2024 Inc. 5000 list of America's fastest-growing private companies for achieving 167% revenue growth over three years, VitalEdge employs more than 750 employees across the US, Canada, India, and Japan. The company is backed by TA Associates and True Wind Capital.

“We saw very measurable benefits immediately. Our invoicing went from eight business days a month to just five hours a month, and that was ROI right out of the gate. We saw a 3% increase in utilization within four months, which generated about \$450,000 in additional revenue.”

Jason Ketterer, Director of Financial Planning and Analysis, VitalEdge Technologies



# From Disconnected Processes to Measurable Impact: How SuiteProjects Pro Transformed VitalEdge's Professional Services Operations

## Disconnected systems and manual work

An outdated homegrown time-tracking system for professional services required time-consuming manual work for billing processes, which limited visibility and hindered the company's private equity sponsor growth goals. The finance team struggled with complex project accounting, while project managers using spreadsheets and Microsoft Projects lacked the insights needed to optimize resource utilization, management, and profitability. Implementing a dedicated professional services automation system that could integrate with VitalEdge's NetSuite ERP became a top priority.

## SuiteProjects Pro solves critical challenges

After considering competing products, VitalEdge found that NetSuite SuiteProjects Pro (formerly OpenAir) was ideally suited to meet its goals of improving and measuring productivity, handling timely and accurate billing, and enhancing time tracking and resource scheduling. Standardizing data, reporting, and project management methodologies in a single consolidated platform interoperating with its NetSuite ERP would help VitalEdge deliver on the growth and profitability goals of its private equity partners.

## Guidance from implementation partner Top Step

VitalEdge benefited from guidance and implementation services from Top Step, a NetSuite partner specializing in SuiteProjects Pro. When VitalEdge bought CDK Global Heavy Equipment in 2023, Top Step proved instrumental in creating a single instance covering both entities. "The Top Step team knows what they're doing—they've done it for years," says Jason Ketterer, Director of Financial Planning and Analysis at VitalEdge. "Top Step came in and really helped us streamline a lot of processes and make everything more efficient."

## ROI out of the gate

With NetSuite SuiteProjects Pro, time required for billing dropped from 64 hours a month to just five hours, representing a 92% improvement. Utilization increased by 3%, generating \$450,000 in additional revenue in only four months. Monthly billings increased by 10% and productivity for billable teams increased by 15%. More than 200 NetSuite SuiteProjects Pro users now include project managers, time entry staff, services leaders, and executives. "Our execs love it," Ketterer says. "I can give them real-time reporting, and our CFO has a dashboard to instantly see all open projects and their status. Our confidence level and our billing have improved dramatically."



## Company Snapshot

**Company:** VitalEdge Technologies

**Location:** Cary, North Carolina

**Industry:** Software and technology

**Number of Countries:** 4

**Employees:** 750+

**Applications Replaced:** Homegrown time tracking tool, Microsoft Projects

**NetSuite Modules Deployed:**

[NetSuite ERP](#)

[NetSuite SuiteProjects Pro](#)

**Implementation Partner:** Top Step