

Cedar Grove Components — NetSuite ERP Modernization — Positive Path Demo

Working analysis and proposal-preparation materials
Not the final client submission

FICTIONAL DEMONSTRATION

All companies, people, projects, and source materials in this sample are fictional.

Client	Cedar Grove Components
Type	NetSuite ERP Modernization and Implementation
Proposal Due	2026-09-11
Submission format	One searchable PDF, maximum 30 narrative pages excluding resumes, references, pricing appendix, and required forms; submit by email to procurement@cedar-grovecomponents.example .
Narrative page limit	30 pages — final client proposal only

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Opportunity Brief

Key dates

Issue date: 2026-08-20

Questions deadline: 2026-08-28

Proposal submission deadline: 2026-09-11

Anticipated award: 2026-09-25

Target kickoff: 2026-10-12

Target production go-live: Within 24 weeks of kickoff

Post-go-live hypercare period: 60 calendar days of post-go-live hypercare

Main services

- Replace Microsoft Dynamics GP 2018 with Oracle NetSuite as CGC's core cloud ERP.
- Implement financial management, including GL, AP, AR, cash management, budgeting support, and close.
- Configure three-entity financials, intercompany processing, and consolidated reporting.
- Implement order-to-cash, procure-to-pay, inventory management across two warehouses, and Fixed Assets Management.
- Integrate NetSuite with Salesforce Sales Cloud, Avalara AvaTax, ADP Workforce Now, and two banking partners' secure payment and reconciliation file exchanges.
- Migrate master data, open transactions, three years of detailed operational history, and seven years of summarized GL history.
- Deliver operational and finance reporting, role-based dashboards, testing, cutover, 60-day hypercare, training, change management, and administrator handoff.

Key requirements

- Deliver production go-live within 24 weeks of the October 12, 2026 kickoff, followed by 60 calendar days of hypercare.
- Provide a fixed-fee price for the defined baseline scope, along with milestones, invoice triggers, terms, currency, assumptions, exclusions, travel treatment, and out-of-scope hourly rates.
- Provide at least three NetSuite ERP implementation case studies completed in the past five years, including one manufacturing/ distribution client with 100+ ERP users, multi-entity financials, migration, and at least two external integrations.
- Provide two contactable client references.
- Identify key personnel: Solution Architect, Project Manager, Integration & Data Lead, and Change & Training Lead; provide required resumes and certifications/ experience.
- Solution Architect must hold current NetSuite ERP Consultant and SuiteFoundation certifications.
- Project Manager must have at least seven years of enterprise-software implementation experience and at least three NetSuite programs.
- Use a configure- before- customize approach and document SuiteScript/ customizations affecting maintainability or upgrades.
- Provide detailed delivery controls: fit- to- standard/ design approval, project governance, RAID and change control, testing/UAT, cutover/rollback, and knowledge transfer.
- Address security controls, SOC 2 Type II and/or ISO 27001 status, AI data-use restrictions, subcontractors/ processors, insurance, and contract terms.

Risks

- The 24-week implementation timeline is aggressive for multi-entity ERP deployment, four integration areas, substantial historical migration, two warehouses, 11,500 SKUs, and 165 named users.
- Fixed-fee baseline pricing exposes the bidder to scope ambiguity in Salesforce mapping, ADP payroll-journal requirements, and bank-specific file formats, all of which will be finalized after award/discovery.
- The required three years of detailed operational history and seven years of summarized GL history may create significant data-quality, transformation, reconciliation, and performance risk.
- The RFP requires named, credentialed key personnel with specific NetSuite experience and availability from kickoff through hypercare.
- Manufacturing/ distribution case-study requirements are prescriptive and may limit eligibility for firms without directly comparable referenceable work.
- Go-live timing, selected workshops, and go-live support may require onsite travel, but final dates are not yet set.
- Security, AI-processing disclosure, insurance, and acceptance of CGC confidentiality, data-protection, and non-solicitation terms may require legal/compliance review.

Missing info to confirm

- [Confirm the intended NetSuite edition, licensed modules, and any required SuiteApps or third-party integration platform.]
- [Confirm whether warehouse mobility, barcode scanning, WMS capabilities, lot/serial tracking, bin management, or advanced inventory features are in scope.]
- [Confirm the Salesforce integration architecture, system of record by object/field, sync frequency, error-handling expectations, and final data directionality.]
- [Confirm ADP payroll-journal scope, level of detail, employee-data handling requirements, and interface method.]
- [Confirm banking partners, payment types, bank-statement formats, approval requirements, and whether NetSuite Banking SuiteApps are acceptable.]
- [Confirm legacy Dynamics GP data quality, availability of historical extracts, attachment/document migration requirements, and retention obligations.]
- [Confirm whether the stated 24-week go-live target includes all entities, integrations, historical data, reports, and fixed-assets scope without phasing.]
- [Confirm UAT duration, business-user availability, decision turnaround expectations, and CGC responsibilities needed to maintain the critical path.]
- [Confirm the required business-hours hypercare coverage window, P1 response/escalation targets, and steady-state support owner after handoff.]
- [Confirm required insurance limits, required security questionnaires, and whether SOC 2 Type II or ISO 27001 is mandatory versus informational.]
- [Confirm commercial contract terms, payment terms, proposal forms, and any required exceptions/markup process.]
- [Confirm travel budget, required onsite locations, and expected frequency of onsite workshops and go-live support.]

Bid Fit Breakdown

Conditional fit

56/100

Sum of 6 weighted dimensions, each rated 0-5 and grounded in the brief, requirements, and compliance matrix. The total is calculated in code from those ratings — never supplied directly by the model.

The matrix supports credible NetSuite capability for the core ERP replacement, financial management, multi-entity accounting, Salesforce and Avalara integrations, and training. However, several operational areas are only partially supported, while bank interfaces and major migration capabilities lack sufficient current information.

STRENGTHS

- Core Dynamics GP-to-NetSuite replacement is Ready.
- Financial management and three- entity/ intercompany/ consolidated reporting are Ready.
- Salesforce and Avalara integrations are Ready.
- Relevant manufacturing and distribution experience is marked Ready.
- Role-based training capability is Ready.

GAPS

- Order-to-cash, procure-to-pay, inventory at the stated scale, and Fixed Assets Management at the stated volume are Partial.
- Secure interfaces for both banking partners are Missing info.
- Migration coverage for all required data objects and the complete migration methodology are Missing info.
- ADP employee-related financial flows and seven years of summarized GL history remain only partially supported.
- NetSuite edition, licensed modules, SuiteApps, WMS and advanced-inventory scope remain unconfirmed.

There is useful direct evidence, including a qualifying manufacturing/ distribution case study, references, partner information, experience metrics, and key staffing evidence. Overall coverage remains weak for a bid of this breadth: 101 of 249 assessed matches have no evidence, and several material solution, migration, integration, and case-study requirements remain unsupported or incomplete.

STRENGTHS

- 75 assessed matches are direct and 44 are partial.
- At least one prescriptively qualifying manufacturing/ distribution case study is Ready.
- Two contactable client references are Ready.
- NetSuite partner status, years of experience, implementation count, and manufacturing/ distribution experience are Ready.
- Role-specific staffing requirements are marked Ready.

GAPS

- 101 of 249 assessed matches have no evidence, with another 29 supported only by adjacent evidence.
- The requirement for three recent NetSuite ERP case studies is Partial because a third approved case study must still be selected.
- The proposal-level relevant case-study requirement is Missing info.
- Approved evidence is missing for both bank-file interfaces, all listed migration objects, and the complete migration methodology.
- Comparable evidence for the stated SKU and fixed-asset volumes is not yet confirmed.

All four specifically required key roles are marked Ready, including their required experience or certifications, and full-team availability from kickoff through hypercare is Ready. The remaining issue is assembling the complete resume attachment set for submission.

STRENGTHS

- The proposed NetSuite Solution Architect requirement, including current ERP Consultant and SuiteFoundation certifications, is Ready.
- The Project Manager requirement, including seven years of enterprise-software experience and at least three NetSuite programs, is Ready.
- The Integration & Data Lead and Change & Training Lead requirements are Ready.
- Key-team availability for the October 12, 2026 kickoff through the full 60-day hypercare period is Ready.
- The proposed staffing model is Ready.

GAPS

- The submission requirement for key-person resumes is Partial because three additional approved resumes still need to be attached.
- The context does not provide further detail on capacity allocation by workstream beyond the Ready availability confirmation.

The target kickoff and 24-week go-live commitment are marked Ready, and governance, design, testing, and cutover approaches are supported. Delivery remains dependent on completing a detailed critical-path plan and controlling substantial migration, integration, client-resource, and hypercare risks.

STRENGTHS

- October 12, 2026 kickoff and production go-live within 24 weeks are Ready.
- Governance, solution design, testing, and cutover/rollback approaches are Ready.
- Key-team availability through hypercare is Ready.
- The proposal timeline requirement is Ready.
- Role-based training is Ready.

GAPS

- The detailed 24-week plan with milestones, dependencies, critical path, client responsibilities, and decision dates is a Partial unresolved critical item.
- The schedule is aggressive for three entities, four integration areas, two warehouses, 11,500 SKUs, 2,800 fixed assets, and extensive historical migration.
- The full migration methodology and evidence for all required data objects are Missing info.
- Bank specifications, Salesforce mappings, ADP detail, legacy-data quality, UAT availability, and decision turnaround remain discovery or client dependencies.
- The 60-day hypercare model and administrator handoff commitments are Missing info.
- The onsite-delivery model and final travel dates remain unconfirmed.

Submission mechanics and many mandatory attachments are defined, but 12 critical- before- submission items still require substantive action. These include mandatory narrative sections, case studies, resumes, assumptions and exclusions, and commercial confirmations, so the response is not near-ready.

STRENGTHS

- The deadline, one-searchable-PDF email method, pricing appendix, staffing model, timeline, references, and governance-related content are represented in the matrix.
- Fixed-fee pricing, payment milestones, invoice triggers, payment terms, hourly rates, security disclosures, insurance information, and core legal confirmations are Ready.
- The required qualifying manufacturing/ distribution case study and two contactable references are Ready.

GAPS

- There are 12 unresolved critical items before submission.
- The executive summary and implementation approach are Partial.
- Relevant case studies are Missing info, and the three-case-study requirement still needs a third approved example.
- The key-person resume attachment requirement is Partial.
- Proposal assumptions and exclusions are Missing info in both the submission and commercial sections.
- Currency and travel treatment remain Partial.
- The detailed 24-week implementation plan is still Partial.

The principal commercial structure can be formed because fixed-fee pricing, milestones, invoice triggers, payment terms, role rates, insurance disclosures, and core legal confirmations are Ready. Material fixed-fee protections remain incomplete because assumptions, exclusions, currency, travel treatment, and several post-award scope details are unresolved.

STRENGTHS

- The fixed-fee baseline implementation price is Ready.
- Payment milestones, invoice triggers, and payment terms are Ready.
- Hourly rates by role for approved out-of-scope work are Ready.
- Professional- liability and cyber-liability insurance limits are Ready.
- Confidentiality, data-protection, and non-solicitation confirmations are Ready subject to final contract review.
- Security, AI-processing, and subcontractor/ sub-processor disclosures are Ready.

GAPS

- Commercial and delivery assumptions are Missing info.
- Proposal exclusions are Missing info.
- Pricing currency is Partial.
- Travel and expense treatment is Partial, while on-site dates and travel budget remain unconfirmed.
- Fixed-fee exposure remains significant because Salesforce mappings, ADP requirements, bank formats, migration conditions, and some licensed-module or SuiteApp assumptions will be finalized later.
- Final commercial contract terms, required forms, payment details, and exception/markup process remain unconfirmed in the brief.

Key Strengths

- The proposed NetSuite Solution Architect requirement, including current ERP Consultant and SuiteFoundation certifications, is Ready.
- The Project Manager requirement, including seven years of enterprise-software experience and at least three NetSuite programs, is Ready.
- The Integration & Data Lead and Change & Training Lead requirements are Ready.
- Key-team availability for the October 12, 2026 kickoff through the full 60-day hyper-care period is Ready.
- The proposed staffing model is Ready.

Key Risks / Gaps

- 101 of 249 assessed matches have no evidence, with another 29 supported only by adjacent evidence.
- The requirement for three recent NetSuite ERP case studies is Partial because a third approved case study must still be selected.
- The proposal-level relevant case-study requirement is Missing info.
- Approved evidence is missing for both bank-file interfaces, all listed migration objects, and the complete migration methodology.
- Comparable evidence for the stated SKU and fixed-asset volumes is not yet confirmed.

What Would Raise The Score

- Confirm the actual rate / pricing / commercial model before submission.
- Select and include a third approved NetSuite ERP case study completed within the last five years.
- Create and include the detailed 24-week plan with milestones, dependencies, critical path, client responsibilities, and decision dates.
- Compile, approve, and include all commercial, delivery, technical, schedule, staffing, data, and client-responsibility assumptions.
- Compile, approve, and include all commercial, technical, delivery, support, licensing, and travel exclusions.
- Draft the executive summary with CGC's business objectives and the full risk set, including schedule, data, integrations, adoption, controls, and client dependencies.

Critical Gaps & Actions

Derived directly from the compliance matrix — sorted by what matters most before submission.

Top Submission Risks

1. Submission mechanics not yet finalized (6 items)
2. Commercial, legal, or security disclosures incomplete (4 items)
3. Case studies or references not yet verified
4. Delivery plan or timeline feasibility needs confirmation

Critical — Before Submission (12)

1.	Limit the proposal narrative to 30 pages, excluding resumes, references, the pricing appendix, and required forms. Submission Confirm the actual rate / pricing / commercial model before submission.	Drafted
2.	Provide at least three NetSuite ERP implementation case studies completed within the last five years. Experience & Evidence Select and include a third approved NetSuite ERP case study completed within the last five years.	Partial
3.	Provide a detailed 24-week implementation plan with milestones, dependencies, critical path, client responsibilities, and decision dates. Delivery Create and include the detailed 24-week plan with milestones, dependencies, critical path, client responsibilities, and decision dates.	Partial
4.	State the currency used for pricing and payment. Commercial & Legal Confirm the actual rate / pricing / commercial model before submission.	Partial
5.	State all proposal assumptions. Commercial & Legal Compile, approve, and include all commercial, delivery, technical, schedule, staffing, data, and client-responsibility assumptions.	Missing info
6.	State all proposal exclusions. Commercial & Legal Compile, approve, and include all commercial, technical, delivery, support, licensing, and travel exclusions.	Missing info
7.	State how travel and expenses will be treated. Commercial & Legal Confirm the actual rate / pricing / commercial model before submission.	Partial
8.	Include an executive summary demonstrating understanding of CGC's objectives and implementation risks. Submission Draft the executive summary with CGC's business objectives and the full risk set, including schedule, data, integrations, adoption, controls, and client dependencies.	Partial
9.	Include the proposed implementation approach in the proposal. Submission Add the approved Mood Space NetSuite implementation- methodology narrative to the proposal.	Partial

10.	Include relevant case studies in the proposal. Submission	Missing info
	Select and insert approved, relevant NetSuite ERP case studies.	
11.	Include key-person resumes in the proposal. Submission	Partial
	Attach the approved resumes for Marcus Reed, Priya Nair, and Elena Torres in addition to Erin Wallace's resume.	
12.	Include proposal assumptions and exclusions in the proposal. Submission	Missing info
	Compile and approve the complete Mood Space assumptions and exclusions section before submission.	

Important — Before Final Review (21)

1.	Include the proposed governance model in the proposal. Submission	Partial
	Add the complete CGC governance structure, client roles, decision rights, forums, cadence, and escalation paths.	
2.	Implement order-to-cash capabilities covering sales orders, fulfillment, invoicing, credit controls, returns, and customer account visibility. Solution	Partial
	Validate and document the proposed credit-control, returns, invoicing, fulfillment, and customer-visibility design.	
3.	Implement procure-to-pay capabilities covering requisitions, purchase orders, receipts, three-way matching, vendor bills, approvals, and payment preparation. Solution	Partial
	Add firm evidence and a detailed design response for every requested procure-to-pay function.	
4.	Implement inventory management for approximately 11,500 active SKUs across two warehouses, including transfers, cycle counting, replenishment parameters, and inventory valuation. Solution	Partial
	Confirm evidence of the 11,500-SKU scale and document transfers, replenishment parameters, and valuation design.	
5.	Implement NetSuite Fixed Assets Management for approximately 2,800 active assets, including depreciation, transfers, retirements, and reporting. Solution	Partial
	Confirm comparable asset-volume evidence and document transfer, retirement, and reporting design.	
6.	Use a configure- before- customize approach. Solution	Partial
	Add Mood Space's formal configure- before- customize decision and exception-governance process to the proposal.	
7.	Document any proposed SuiteScript or other customization that could affect maintainability or upgrades. Solution	Partial
	Add the customization register format and required maintainability/ upgrade- impact fields.	
8.	Reduce spreadsheet dependency while preserving appropriate business controls. Solution	Partial
	Describe the specific CGC controls to be preserved and how residual spreadsheet use will be governed.	
9.	Integrate ADP Workforce Now with NetSuite for approved payroll-journal and employee-related financial data flows. Integration & Data	Partial
	Confirm and document the employee-related financial flows in addition to payroll-journal processing.	

10.	Implement secure bank-file interfaces for payment files and bank- statement/ reconciliation files for CGC's two banking partners. Integration & Data Provide approved technical evidence and the proposed approach for both bank-file interfaces.	Missing info
11.	Migrate customer, vendor, item, chart-of-accounts, open AR/AP, open sales and purchase orders, inventory balances, and fixed-asset master data. Integration & Data Provide Mood Space NetSuite migration evidence covering every listed data object.	Missing info
12.	Migrate three years of detailed operational history and seven years of summarized general-ledger history. Integration & Data Add approved evidence and approach for seven years of summarized general-ledger history.	Partial
13.	Provide a data-migration approach covering profiling, mapping, cleansing, mock conversions, reconciliation, exception handling, cutover, and business sign-off. Integration & Data Provide an approved Mood Space NetSuite migration methodology addressing every requested element.	Missing info
14.	Deliver finance and operations reporting for consolidated P&L and balance sheet, AP/AR aging, cash position, sales and margin, inventory valuation, inventory turns, open orders, pu... Reporting Map each requested report to a standard NetSuite report, saved search, workbook, or dashboard deliverable.	Partial
15.	Provide 60 calendar days of post-go-live hypercare with defined business-hours coverage, P1 escalation, daily/weekly triage cadence, knowledge transfer, and transition to steady-st... Delivery Approve and document Mood Space's 60-day coverage hours, P1 escalation, triage cadence, knowledge-transfer activities, and transition model.	Missing info
16.	Complete knowledge transfer and administrator handoff before the end of the 60-day hypercare period. Delivery Provide an approved Mood Space commitment and handoff deliverables tied to the 60-day period.	Missing info
17.	Provide a change and adoption approach covering stakeholder communications, role impacts, readiness checks, adoption measures, super-user/champion support, and go-live reinforcement... Training & Change Provide the approved Mood Space change and adoption methodology addressing every requested element.	Missing info
18.	Prepare finance, operations, warehouse, and business users for adoption before go-live. Training & Change Document the CGC-specific readiness plan and criteria for each requested user group.	Partial
19.	Plan delivery around CGC providing business-process owners, finance leadership, warehouse and order-management SMEs, UAT participants, IT/security contacts, and an executive sponso... Delivery Explicitly map each requested CGC role to responsibilities, estimated effort, and decision/approval obligations.	Partial
20.	Plan migration work around CGC providing Dynamics GP database/export access, sample extracts, data owners, and timely answers to mapping questions. Integration & Data Add the stated Dynamics GP access, sample-extract, data-owner, and mapping-response dependencies to the proposal assumptions and plan.	Partial

21.	Plan onsite work to be limited to kickoff, selected workshops, and go-live support, with final travel dates agreed after award. Delivery Confirm the onsite-delivery model and include the post-award travel-scheduling process in the proposal.	Partial
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Delivery / Post-Award Clarification (4)

1.	Provide role-based dashboards for the CFO/Controller, finance users, operations leadership, warehouse managers, and customer- service/ order- management users. Reporting Define the dashboard catalogue, KPIs, filters, and access by each requested role.	Partial
2.	Confirm final Salesforce field mappings and integration directionality during design workshops. In- tegration & Data Finalize and approve field-level mappings, directionality, ownership, exception handling, and synchronization rules during design.	Partial
3.	Confirm final ADP payroll-journal detail during discovery. Integration & Data Finalize and approve the ADP payroll-journal specification during discovery.	Partial
4.	Confirm final bank-specific file formats during discovery. Integration & Data Obtain and approve both banks' file specifications and operating requirements during discovery.	Partial

Compliance Matrix

Req	Requirement	Suggested response	Matched evidence	Source	Conf.	Status	Action needed
R1	Include the proposed staffing model in the proposal. Submission	Mood Space proposes four named leads: Erin Wallace, NetSuite Solution Architect; Marcus Reed, Project Manager; Priya Nair, Integration & Data Lead; and Elena Torres, Change & Training Lead. Functional consultants, a NetSuite developer, migration support, test/UAT support, and reporting support will be added according to the detailed plan.	All four leads are approved and available from kickoff through go-live and 60-day hypercare; supplemental delivery roles are also identified.	MoodSpace CedarGrove Team Assignment Availability	96%	Ready	—
R2	Include the proposed governance model in the proposal. Submission	The governance model will identify accountable leads for solution architecture, project management, integration/data, and change/training. A complete CGC-specific model covering client representation, decision rights, meeting cadence, RAID, change control, and escalation will be included.	The approved team identifies four accountable workstream leads. The other matched governance material is a fictional ServiceNow template and cannot substantiate Mood Space's CGC model.	MoodSpace CedarGrove Team Assignment Availability	55%	Partial	Add the complete CGC governance structure, client roles, decision rights, forums, cadence, and escalation paths.
R3	Name the proposed Integration & Data Lead and provide a resume showing NetSuite integration, SuiteCloud/API, and ERP data-migration experience. Staffing	Priya Nair is the proposed Integration & Data Lead. Her resume documents 11 years of integration/data engineering, seven years of NetSuite experience, SuiteTalk REST/SOAP, RESTlets, SuiteCloud, middleware and file integration skills, and Dynamics GP migration leadership through extraction, mapping, mock conversion, reconciliation, and cutover.	Priya Nair's approved resume directly documents the required NetSuite integration, SuiteCloud/API, and ERP migration experience and confirms availability through hypercare.	Priya Nair Resume	99%	Ready	—

R4	Name the proposed Change & Training Lead and provide a resume showing enterprise-software adoption, role-based training, and go-live readiness experience. Staffing	Elena Torres is the proposed Change & Training Lead. Her approved resume documents 13 years of enterprise-software change and enablement experience, role-based training for finance, operations, warehouse, managers and administrators, readiness checks, adoption measures, go-live support, and hypercare handoff.	Elena Torres's approved resume covers enterprise-software adoption, role-based curricula, readiness, communications, reinforcement, and administrator/trainer handoff.	Elena Torres Resume	99%	Ready	—
R5	Confirm that the proposed key team is available for an October 12, 2026 kickoff and through the full 60-day hypercare period. Staffing	Mood Space confirms that Erin Wallace, Marcus Reed, Priya Nair, and Elena Torres are available for the October 12, 2026 kickoff and are planned to remain engaged through production go-live and the full 60-day hypercare period, subject to contract execution by October 2, 2026.	The approved team confirmation explicitly covers all four named leads, the kickoff date, and engagement through the 60-day hypercare period.	MoodSpace CedarGrove Team Assignment Availability	99%	Ready	—
R6	Replace Microsoft Dynamics GP with Oracle NetSuite as CGC's core cloud ERP platform. Solution	Mood Space will replace Microsoft Dynamics GP with Oracle NetSuite as CGC's core cloud ERP, applying experience from a comparable industrial distribution modernization that replaced GP with NetSuite and migrated financial, order, inventory, fixed-asset, and historical data.	RedRock replaced Dynamics GP and spreadsheet-based processes with NetSuite across financials, order management, procurement, inventory, fixed assets, integrations, and reporting.	RedRock Industrial Case Study	94%	Ready	—

R7	Implement NetSuite Financial Management, including general ledger, accounts payable, accounts receivable, cash management, budgeting support, and financial close. Solution	Mood Space will implement NetSuite Financial Management covering general ledger, accounts payable, accounts receivable, cash management, budgeting support, and financial close design using its phased fit-to-standard, configuration, testing, cutover, and handoff methodology.	The capability profile expressly covers Financial Management, AP/AR, cash management, budgeting support, and close-process design; the methodology covers implementation through sign-off and handoff.	MoodSpace NetSuite Capability Profile	96%	Ready	—
R8	Implement multi-entity financial management for three legal entities, including intercompany transactions and consolidated reporting. Solution	Mood Space will implement multi-entity financial management for CGC's three legal entities, including intercompany processing and consolidated reporting.	Mood Space's capability profile expressly covers multi-entity consolidation and intercompany. Meridian demonstrates accepted consolidated reporting across four entities.	Meridian Specialty Case Study	97%	Ready	—
R9	Implement order-to-cash capabilities covering sales orders, fulfillment, invoicing, credit controls, returns, and customer account visibility. Solution	Mood Space proposes NetSuite order-to-cash configuration covering sales orders, fulfillment, invoicing, credit controls, returns, and customer account visibility. Detailed workflows and controls will be validated through fit-to-standard design workshops and demonstrations.	The capability profile supports order management and sales-order processing; the methodology supports fit-to-standard design, iterative configuration, demonstrations, and testing.	MoodSpace NetSuite Capability Profile	73%	Partial	Validate and document the proposed credit-control, returns, invoicing, fulfillment, and customer-visibility design.
R10	Implement procure-to-pay capabilities covering requisitions, purchase orders, receipts, three-way matching, vendor bills, approvals, and payment preparation. Solution	Mood Space proposes NetSuite procure-to-pay covering requisitions, purchase orders, receipts, three-way matching, vendor bills, approvals, and payment preparation, with detailed workflows finalized through fit-to-standard design and end-to-end testing.	The methodology supports fit-to-standard design and end-to-end testing, but the matched assets do not directly establish all requested procure-to-pay functions.	MoodSpace NetSuite Implementation Methodology	52%	Partial	Add firm evidence and a detailed design response for every requested procure-to-pay function.

R11	Implement inventory management for approximately 11,500 active SKUs across two warehouses, including transfers, cycle counting, replenishment parameters, and inventory valuation. Solution	Mood Space proposes NetSuite inventory management for approximately 11,500 active SKUs across two warehouses, including transfers, cycle counting, replenishment parameters, and inventory valuation. Detailed parameters and controls will be confirmed during design.	Mood Space has multi-warehouse inventory capability and prior two-warehouse NetSuite delivery, including inventory reconciliation and cycle-count validation.	RedRock Industrial Case Study	75%	Partial	Confirm evidence of the 11,500-SKU scale and document transfers, replenishment parameters, and valuation design.
R12	Implement NetSuite Fixed Assets Management for approximately 2,800 active assets, including depreciation, transfers, retirements, and reporting. Solution	Mood Space proposes NetSuite Fixed Assets Management for approximately 2,800 active assets, including depreciation, transfers, retirements, and reporting. Asset classes, depreciation rules, transfer/retirement workflows, and reports will be finalized during design.	Mood Space's capability profile includes fixed assets, and Summit demonstrates fixed-assets implementation and reconciliation of opening balances and depreciation schedules.	Summit Equipment Case Study	72%	Partial	Confirm comparable asset-volume evidence and document transfer, retirement, and reporting design.
R13	Use a configure- before- customize approach. Solution	Mood Space will use standard supported NetSuite capabilities and interfaces before introducing customization. Any exception will require documented justification, design approval, and consideration of upgradeability.	CGC commercial facts state that baseline interfaces use supported APIs/files without materially custom third-party development; custom applications outside baseline scope are excluded.	MoodSpace CedarGrove Commercial Response Facts	78%	Partial	Add Mood Space's formal configure- before- customize decision and exception-governance process to the proposal.
R14	Document any proposed SuiteScript or other customization that could affect maintainability or upgrades. Solution	Mood Space will document any proposed SuiteScript or other customization, including business justification, maintainability and upgrade impacts, design approval, and change-control status. Baseline interfaces are expected to use supported APIs/files.	Commercial facts support standard interfaces, exclude unlisted custom applications, and require written change control for material scope changes.	MoodSpace CedarGrove Commercial Response Facts	68%	Partial	Add the customization register format and required maintainability/ upgrade- impact fields.

R15	Reduce spreadsheet dependency while preserving appropriate business controls. Solution	Mood Space will reduce spreadsheet dependency by moving controlled financial, order, procurement, inventory, fixed-asset, and reporting processes into NetSuite while preserving reconciliations, approvals, role-based reporting, and documented exceptions.	RedRock replaced spreadsheet-based order and inventory processes with NetSuite and achieved documented financial reconciliation before sign-off.	RedRock Industrial Case Study	84%	Partial	Describe the specific CGC controls to be preserved and how residual spreadsheet use will be governed.
R16	Integrate Salesforce Sales Cloud with NetSuite for approved account, customer, opportunity/order, and status data flows. Integration & Data	Mood Space will integrate Salesforce Sales Cloud with NetSuite for approved account/customer, opportunity/order, and status flows using supported APIs. Final field mappings, ownership, directionality, and exception handling will be confirmed during design.	Priya Nair previously led Salesforce- to- NetSuite customer/account, sales-order, and status synchronization; commercial facts approve supported APIs/files for the defined flows.	Priya Nair Resume	92%	Ready	—
R17	Integrate Avalara AvaTax with NetSuite for tax calculation and related transaction processing. Integration & Data	Mood Space will integrate Avalara AvaTax with NetSuite for tax calculation and related transaction processing using supported APIs/files, with detailed transaction and exception flows finalized during design.	Priya Nair has led Avalara AvaTax integration design and testing, and the commercial response includes Avalara among the baseline supported interfaces.	Priya Nair Resume	92%	Ready	—
R18	Integrate ADP Workforce Now with NetSuite for approved payroll-journal and employee-related financial data flows. Integration & Data	Mood Space will integrate ADP Workforce Now with NetSuite for approved payroll-journal and employee-related financial data flows, using supported APIs/files and confirming detailed fields and controls during discovery.	Priya Nair has led ADP payroll-journal integration design and testing; RedRock included ADP Workforce Now; Mood Space has relevant ADP integration capacity.	Priya Nair Resume	87%	Partial	Confirm and document the employee-related financial flows in addition to payroll-journal processing.

Compliance Matrix (cont'd)

Req	Requirement	Suggested response	Matched evidence	Source	Conf.	Status	Action needed
R19	Implement secure bank-file interfaces for payment files and bank- statement/ reconciliation files for CGC's two banking partners. Integration & Data	A CGC-specific bank-interface response covering payment files and statement/ reconciliation files for both banking partners must be added to the proposal.	—	No source matched	12%	Missing info	Provide approved technical evidence and the proposed approach for both bank-file interfaces.
R20	Migrate customer, vendor, item, chart-of-accounts, open AR/AP, open sales and purchase orders, inventory balances, and fixed-asset master data. Integration & Data	The proposal must add an approved NetSuite migration response covering customer, vendor, item, chart-of-accounts, open AR/AP, open sales and purchase orders, inventory balances, and fixed-asset master data.	—	No source matched	12%	Missing info	Provide Mood Space NetSuite migration evidence covering every listed data object.
R21	Migrate three years of detailed operational history and seven years of summarized general-ledger history. Integration & Data	Mood Space proposes migration of three years of detailed operational history and seven years of summarized general-ledger history. The detailed extraction, transformation, reconciliation, and performance approach will be documented in the migration plan.	Summit demonstrates migration of three years of operational history; no matched asset establishes seven years of summarized general-ledger history.	Summit Equipment Case Study	57%	Partial	Add approved evidence and approach for seven years of summarized general-ledger history.
R22	Provide a data-migration approach covering profiling, mapping, cleansing, mock conversions, reconciliation, exception handling, cutover, and business sign-off. Integration & Data	A Mood Space-specific migration approach must be added covering profiling, mapping, cleansing, mock conversions, reconciliation, exception handling, cutover, and business sign-off.	—	No source matched	15%	Missing info	Provide an approved Mood Space NetSuite migration methodology addressing every requested element.

R23	Deliver finance and operations reporting for consolidated P&L and balance sheet, AP/AR aging, cash position, sales and margin, inventory valuation, inventory turns, open orders, purchasing, and warehouse performance. Reporting	Mood Space will deliver consolidated financial and operational reporting. The detailed report catalogue will cover consolidated P&L and balance sheet, AP/AR aging, cash position, sales and margin, inventory valuation and turns, open orders, purchasing, and warehouse performance, subject to confirmation during design.	Meridian demonstrates multi-entity executive and consolidated reporting; the capability profile supports role-based dashboards, multi-entity reporting, financials, order management, procurement, and inventory.	MoodSpace NetSuite Capability Profile	74%	Partial	Map each requested report to a standard NetSuite report, saved search, workbook, or dashboard deliverable.
R24	Submit all RFP questions by August 28, 2026 at 3:00 PM ET. Submission	Mood Space will submit all RFP questions by August 28, 2026 at 3:00 PM ET.	—	No source matched	98%	Drafted	Review and confirm this response before submission.
R25	Submit the complete proposal no later than September 11, 2026 at 4:00 PM ET. Submission	Mood Space will submit the complete proposal no later than September 11, 2026 at 4:00 PM ET.	—	No source matched	99%	Drafted	Review and confirm this response before submission.
R26	Submit the proposal as one searchable PDF by email to procurement@ cedargrove-compon ents. example. Submission	Mood Space will submit the proposal as one searchable PDF by email to procurement@ cedargrove-compon ents. example.	—	No source matched	99%	Drafted	Review and confirm this response before submission.
R27	Limit the proposal narrative to 30 pages, excluding resumes, references, the pricing appendix, and required forms. Submission	Mood Space will limit the proposal narrative to 30 pages, excluding resumes, references, the pricing appendix, and required forms.	—	No source matched	99%	Drafted	Confirm the actual rate / pricing / commercial model before submission.

R28	Provide at least three NetSuite ERP implementation case studies completed within the last five years. Experience & Evidence	Mood Space will include the RedRock Industrial Supply and Meridian Specialty Foods NetSuite case studies, both completed within the last five years. A third qualifying NetSuite implementation case study must also be included.	Two qualifying completed NetSuite case studies are matched. The capability profile states 31 completed implementations but does not provide a third case study.	RedRock Industrial Case Study	72%	Partial	Select and include a third approved NetSuite ERP case study completed within the last five years.
R29	Ensure at least one case study involves a manufacturing or distribution company with at least 100 ERP users, multi-entity financials, data migration, and at least two external integrations. Experience & Evidence	The Meridian Specialty Foods case study satisfies this requirement: food manufacturing and distribution, 132 ERP users, four legal entities, multi-entity financials, migrated finance and operations data, and integrations with Avalara, payroll, banking, and CRM systems.	Meridian meets every stated industry, user-count, multi-entity, migration, and integration criterion.	Meridian Specialty Case Study	99%	Ready	—
R30	Provide two client references that CGC may contact during evaluation. Experience & Evidence	CGC may contact Linda Park, Vice President, Operations at RedRock Industrial Supply, and Ryan Patel, Chief Financial Officer at Meridian Specialty Foods. Both contacts have authorized use of their details for this evaluation.	The approved reference sheet provides names, titles, email addresses, phone numbers, engagements, and explicit permission for both references.	MoodSpace Approved Client References	99%	Ready	—
R31	Describe the vendor's Oracle NetSuite partner status. Experience & Evidence	Mood Space is a current Oracle NetSuite Alliance Partner.	The approved capability profile states Mood Space's current status as Oracle NetSuite Alliance Partner.	MoodSpace NetSuite Capability Profile	99%	Ready	—
R32	State the vendor's years of NetSuite delivery experience. Experience & Evidence	Mood Space has eight years of NetSuite delivery experience.	The approved capability profile states eight years of NetSuite delivery history.	MoodSpace NetSuite Capability Profile	99%	Ready	—

R33	State the number of NetSuite implementations completed by the vendor. Experience & Evidence	Mood Space has completed 31 NetSuite implementations.	The approved capability profile states 31 completed NetSuite implementations.	MoodSpace NetSuite Capability Profile	99%	Ready	—
R34	Describe the vendor's manufacturing and distribution experience. Experience & Evidence	Mood Space completed 11 manufacturing/ distribution NetSuite implementations during 2022–2026. Its experience includes multi-warehouse inventory, purchasing, sales-order processing, tax, banking, multi-entity reporting, ERP migration, integrations, training, cutover, and hypercare.	The capability profile establishes the delivery count and domains; Meridian and RedRock provide completed manufacturing/ distribution examples.	MoodSpace NetSuite Capability Profile	98%	Ready	—
R35	Name the proposed NetSuite Solution Architect and provide a resume showing current NetSuite ERP Consultant and SuiteFoundation certifications. Staffing	Erin Wallace is the proposed NetSuite Solution Architect. Her approved resume confirms current NetSuite Certified ERP Consultant and NetSuite Certified SuiteFoundation credentials, nine years of NetSuite experience, and availability from kickoff through hypercare.	Erin Wallace's approved resume directly states both required certifications and her proposed assignment.	Erin Wallace Resume	99%	Ready	—
R36	Name the proposed Project Manager and provide a resume showing at least seven years of enterprise-software implementation experience and experience on at least three NetSuite programs. Staffing	Marcus Reed is the proposed Project Manager. His approved resume documents 12 years of enterprise-software implementation management and eight completed NetSuite programs, exceeding the stated minimums.	Marcus Reed's approved resume confirms the role, 12 years of experience, eight NetSuite programs, and availability through hypercare.	Marcus Reed Resume	99%	Ready	—

Compliance Matrix (cont'd)

Req	Requirement	Suggested response	Matched evidence	Source	Conf.	Status	Action needed
R37	Include the proposed implementation timeline in the proposal. Submission	The proposed timeline begins October 12, 2026, targets production go-live within 24 weeks, and includes 60 calendar days of post-go-live hypercare.	The approved team assignment states the kickoff, go-live target, and hypercare duration.	MoodSpace CedarGrove Team Assignment Availability	96%	Ready	—
R38	Provide role-based dashboards for the CFO/Controller, finance users, operations leadership, warehouse managers, and customer-service/ order- management users. Reporting	Mood Space proposes role-based NetSuite dashboards for the CFO/Controller, finance users, operations leadership, warehouse managers, and customer- service/ order- management users. Dashboard content, filters, KPIs, and access will be finalized during design.	Mood Space's capability profile supports role-based dashboards and financial, order-management, inventory, warehouse, and multi-entity reporting domains.	MoodSpace Net-Suite Capability Profile	65%	Partial	Define the dashboard catalogue, KPIs, filters, and access by each requested role.
R39	Plan for the target project kickoff date of October 12, 2026. Delivery	Mood Space's delivery plan is based on an October 12, 2026 kickoff. All four proposed leads are confirmed available for that date, subject to contract execution by October 2, 2026.	The approved staffing confirmation and Project Manager resume both confirm availability for the target kickoff.	MoodSpace CedarGrove Team Assignment Availability	99%	Ready	—
R40	Complete production go-live within 24 weeks of kickoff. Delivery	Mood Space will target production go-live within 24 weeks of kickoff. Comparable NetSuite programs reached go-live in 19 and 22 weeks, including a 22-week GP-to-NetSuite industrial- distribution modernization.	Summit went live in 19 weeks and RedRock in 22 weeks; both are NetSuite implementations within the required duration.	RedRock Industrial Case Study	92%	Ready	—

R41	Provide a detailed 24-week implementation plan with milestones, dependencies, critical path, client responsibilities, and decision dates. Delivery	Mood Space will provide a 24-week plan beginning October 12, 2026 and covering milestones, dependencies, critical path, client responsibilities, and decision dates. The available evidence confirms the overall duration and staffing but not the detailed plan.	The staffing asset confirms kickoff and the 24-week target. No matched Mood Space asset provides the required detailed milestone and dependency schedule.	MoodSpace CedarGrove Team Assignment Availability	48%	Partial	Create and include the detailed 24-week plan with milestones, dependencies, critical path, client responsibilities, and decision dates.
R42	Provide project governance including weekly status reporting, RAID management, decision logging, change control, steering-committee cadence, and executive escalation. Delivery	Mood Space's governance will include weekly status reporting; a RAID log with ownership, due dates, severity, mitigation, and escalation; a decision log; documented change requests with scope, schedule and cost impacts; steering committee meetings every two weeks during build/test and weekly during cutover readiness; and executive escalation for critical issues.	Mood Space's approved methodology directly covers weekly reporting, RAID, decision logging, change control, steering cadence, and escalation paths.	MoodSpace NetSuite Implementation Methodology	98%	Ready	—
R43	Provide a solution-design approach using documented process decisions, fit-to-standard analysis, configuration workbooks, demonstrations, and formal design approval. Delivery	Mood Space will conduct fit-to-standard workshops, document process decisions and configuration workbooks, produce integration/data designs and reporting definitions, demonstrate iterative configuration, and obtain formal design approval.	The approved NetSuite methodology directly covers every requested solution-design element.	MoodSpace NetSuite Implementation Methodology	99%	Ready	—

R44	Provide a testing approach covering configuration testing, integration testing, migration validation, end-to-end testing, UAT, defect management, entry/exit criteria, and sign-off. Delivery	Mood Space's testing approach covers configuration and integration testing, mock-conversion and migration reconciliation, end-to-end testing, UAT, severity-based defect management, defined entry/exit criteria, retesting, and formal business sign-off before cutover.	The approved NetSuite methodology directly includes all requested testing and acceptance elements.	MoodSpace NetSuite Implementation Methodology	99%	Ready	—
R45	Provide a cutover and rollback plan covering owners, sequence, data freeze, migration, validation, communications, go/no-go criteria, fallback procedures, and hypercare transition. Delivery	Mood Space will prepare a cutover runbook covering owners, sequence, freeze, final conversion, validation, communications, go/no-go, production deployment, rollback readiness, and transition into hypercare and handoff.	Mood Space's methodology covers rehearsal, freeze, final conversion, validation, go/no-go, communications, deployment, rollback readiness, hypercare, and handoff.	MoodSpace NetSuite Implementation Methodology	93%	Ready	—
R46	Provide 60 calendar days of post-go-live hypercare with defined business-hours coverage, P1 escalation, daily/weekly triage cadence, knowledge transfer, and transition to steady-state ownership. Delivery	A CGC-specific 60-day hypercare model must be added, including confirmed business-hours coverage, P1 escalation, daily/weekly triage cadence, knowledge transfer, and steady-state ownership transition.	The matched assets contain only fictional or non-Mood Space support models and a 45-day ServiceNow example; they do not substantiate the required Mood Space commitment.	No source matched	18%	Missing info	Approve and document Mood Space's 60-day coverage hours, P1 escalation, triage cadence, knowledge-transfer activities, and transition model.
R47	Complete knowledge transfer and administrator handoff before the end of the 60-day hypercare period. Delivery	The proposal must confirm that knowledge transfer and administrator handoff will be completed before the end of CGC's 60-day hypercare period.	—	No source matched	16%	Missing info	Provide an approved Mood Space commitment and handoff deliverables tied to the 60-day period.

R48	Provide role-based training for finance, operations, warehouse, managers, administrators, and train-the-trainer participants, including job aids and recorded materials where appropriate. Training & Change	Under Elena Torres's leadership, Mood Space will provide role-based training for finance, operations, warehouse, managers, administrators, and train-the-trainer participants, supported by curricula, job aids, recorded demonstrations, office hours, reinforcement materials, and handoff.	Elena Torres's approved resume directly covers every requested audience and material type.	Elena Torres Resume	99%	Ready	—
R49	Provide a change and adoption approach covering stakeholder communications, role impacts, readiness checks, adoption measures, super-user/champion support, and go-live reinforcement. Training & Change	A Mood Space-specific change and adoption approach must be added covering stakeholder communications, role impacts, readiness checks, adoption measures, super-user/champion support, and go-live reinforcement.	—	No source matched	14%	Missing info	Provide the approved Mood Space change and adoption methodology addressing every requested element.
R50	Prepare finance, operations, warehouse, and business users for adoption before go-live. Training & Change	Mood Space will prepare finance, operations, warehouse, and other business users before go-live through role-based training, readiness activities, provisioning, communications, and adoption support. Detailed readiness criteria will be defined in the change plan.	RedRock completed role-based training for all planned users before cutover and completed warehouse inventory readiness activities.	RedRock Industrial Case Study	68%	Partial	Document the CGC-specific readiness plan and criteria for each requested user group.
R51	Provide a fixed-fee implementation price covering the defined baseline scope. Commercial & Legal	Mood Space proposes a fixed implementation fee of USD 284,000 for the baseline scope defined in CGC RFP CGC-ERP-2026-04, subject to the stated assumptions, exclusions, and written change control for material scope changes.	The approved commercial response provides the actual fixed fee, currency, scope basis, assumptions, exclusions, and change-control condition.	MoodSpace CedarGrove Commercial Response Facts	99%	Ready	—

R52	Provide proposed payment milestones. Commercial & Legal	Proposed payment milestones are: 15% at contract execution/ mobilization completion; 20% at solution-design approval; 25% at build completion/UAT entry; 25% at production go-live; and 15% at hypercare completion and final hand-off.	The approved commercial response provides the complete milestone percentages and triggers.	MoodSpace CedarGrove Commercial Response Facts	99%	Ready	—
R53	Provide proposed invoice triggers. Commercial & Legal	Invoice triggers are contract execution/ mobilization completion, solution-design approval, build completion/UAT entry, production go-live, and hypercare completion/final handoff.	The approved commercial response directly lists all invoice triggers.	MoodSpace CedarGrove Commercial Response Facts	99%	Ready	—
R54	State the proposed payment terms. Commercial & Legal	Proposed payment terms are Net 30.	The approved commercial response states Net 30 payment terms.	MoodSpace CedarGrove Commercial Response Facts	99%	Ready	—

Compliance Matrix (cont'd)

Req	Requirement	Suggested response	Matched evidence	Source	Conf.	Status	Action needed
R55	State the currency used for pricing and payment. Commercial & Legal	All pricing and payments are stated in United States dollars (USD).	The approved commercial response identifies USD as the currency.	MoodSpace CedarGrove Commercial Response Facts	99%	Partial	Confirm the actual rate / pricing / commercial model before submission.
R56	State all proposal assumptions. Commercial & Legal	A complete, approved list of CGC proposal assumptions must be added before submission.	—	No source matched	8%	Missing info	Compile, approve, and include all commercial, delivery, technical, schedule, staffing, data, and client-responsibility assumptions.
R57	State all proposal exclusions. Commercial & Legal	A complete, approved list of CGC proposal exclusions must be added before submission.	—	No source matched	6%	Missing info	Compile, approve, and include all commercial, technical, delivery, support, licensing, and travel exclusions.
R58	State how travel and expenses will be treated. Commercial & Legal	Delivery will be remote-first. Approved onsite travel will be reimbursed at actual cost with no markup.	The approved commercial response directly states the travel and expense model.	MoodSpace CedarGrove Commercial Response Facts	99%	Partial	Confirm the actual rate / pricing / commercial model before submission.
R59	Provide hourly rates by role for approved out-of-scope work. Commercial & Legal	Approved out-of-scope rates are: Project Manager \$225/hour; NetSuite Solution Architect \$255/hour; Functional Consultant \$205/hour; Integration & Data Lead \$230/hour; Change & Training Lead \$190/hour; and NetSuite Developer \$215/hour.	The approved commercial response provides actual hourly rates for all six roles.	MoodSpace CedarGrove Commercial Response Facts	99%	Ready	—

R60	Describe data-security controls, access controls, device controls, encryption practices, credential handling, and client-environment access management. Commercial & Legal	Mood Space uses company-managed endpoints with full-disk encryption, endpoint protection, screen locking, and centralized patch/security management. MFA is used for company services and supported privileged client access. Client access is least-privilege, engagement-specific, approved by the delivery lead, and removed when no longer required. Credentials remain in approved secure credential systems, and sensitive exports use approved encrypted locations restricted to assigned personnel.	The approved security overview directly covers device, encryption, access, credential, and client-environment controls.	MoodSpace Security Privacy Insurance Overview	99%	Ready	—
R61	State the vendor's current SOC 2 Type II and/or ISO 27001 certification status. Commercial & Legal	Mood Space has a current SOC 2 Type II report issued in February 2026 covering the 2025 calendar-year control period. Mood Space is not currently ISO 27001 certified.	The approved security overview directly states both current statuses.	MoodSpace Security Privacy Insurance Overview	99%	Ready	—
R62	Confirm that CGC data will not be used to train public AI models. Commercial & Legal	Mood Space confirms that Cedar Grove Components data will not be used to train public AI models.	The approved security and data-use overview expressly prohibits using CGC data to train public AI models.	MoodSpace Security Privacy Insurance Overview	99%	Ready	—
R63	Disclose any AI or model providers that would process CGC production data during implementation delivery. Commercial & Legal	No AI or model providers are planned to process CGC production data during implementation delivery. Any change would require prior written CGC approval and documented security/privacy review.	The approved security overview directly states that no AI/model providers are planned for CGC production data.	MoodSpace Security Privacy Insurance Overview	99%	Ready	—

R64	Disclose any subcontractors or subprocessors planned for delivery. Commercial & Legal	Mood Space plans no subcontractors for CGC delivery. No AI/model subprocessors are planned to process CGC production data.	The approved security overview states that no subcontractors and no AI/model providers processing CGC production data are planned.	MoodSpace Security Privacy Insurance Overview	98%	Ready	—
R65	Provide the vendor's professional- liability insurance limit. Commercial & Legal	Mood Space's professional- liability insurance limit is USD 2,000,000 per claim and USD 2,000,000 aggregate.	The approved Mood Space security and insurance overview directly states the professional- liability limits.	MoodSpace Security Privacy Insurance Overview	99%	Ready	—
R66	Provide the vendor's cyber-liability insurance limit. Commercial & Legal	Mood Space's cyber-liability insurance limit is USD 2,000,000 per claim and USD 2,000,000 aggregate.	The approved Mood Space security and insurance overview directly states the cyber-liability limits.	MoodSpace Security Privacy Insurance Overview	99%	Ready	—
R67	Confirm acceptance of CGC's standard confidentiality terms, subject to final contract review. Commercial & Legal	Mood Space accepts CGC's standard confidentiality terms in principle, subject to final legal review of the complete agreement and any materially different terms introduced after award.	The approved contract position directly states this qualified acceptance.	MoodSpace Security Privacy Insurance Overview	99%	Ready	—
R68	Confirm acceptance of CGC's standard data-protection terms, subject to final contract review. Commercial & Legal	Mood Space accepts CGC's standard data-protection terms in principle, subject to final legal review of the complete agreement and any materially different terms introduced after award.	The approved contract position directly states this qualified acceptance.	MoodSpace Security Privacy Insurance Overview	99%	Ready	—
R69	Confirm acceptance of CGC's standard non-solicitation terms, subject to final contract review. Commercial & Legal	Mood Space accepts CGC's standard non-solicitation terms in principle, subject to final legal review of the complete agreement and any materially different terms introduced after award.	The approved contract position directly states this qualified acceptance.	MoodSpace Security Privacy Insurance Overview	99%	Ready	—

R70	Include an executive summary demonstrating understanding of CGC's objectives and implementation risks. Submission	The executive summary will describe CGC's ERP modernization objectives and material implementation risks. The matched evidence supports security, privacy, AI-data-use, subcontractor, insurance, and contract risks, but does not establish the complete executive summary.	The security overview identifies security controls, certification status, AI-data-use restrictions, subcontractor position, insurance limits, and qualified contract acceptance.	MoodSpace Security Privacy Insurance Overview	42%	Partial	Draft the executive summary with CGC's business objectives and the full risk set, including schedule, data, integrations, adoption, controls, and client dependencies.
R71	Include the proposed implementation approach in the proposal. Submission	The proposal will describe a phased implementation approach covering mobilization and governance, discovery and design, configuration and build, migration and integrations, testing and enablement, cutover and go-live, and hypercare and handoff. The current matched evidence confirms staffing and timing but not an approved Mood Space approach narrative.	The team assignment confirms the proposed leadership, kickoff, 24-week target, and 60-day hypercare.	MoodSpace CedarGrove Team Assignment Availability	45%	Partial	Add the approved Mood Space NetSuite implementation- methodology narrative to the proposal.
R72	Include the proposed implementation workstreams in the proposal. Submission	Proposed workstreams will include program governance, NetSuite functional solution, integrations and data migration, change and training, testing/UAT, reporting, technical development, cutover, and hypercare/handoff.	The approved staffing asset identifies leads for architecture, project management, integration/data, and change/training, plus functional, development, migration, test/UAT, and reporting support.	MoodSpace CedarGrove Team Assignment Availability	83%	Ready	—

Compliance Matrix (cont'd)

Req	Requirement	Suggested response	Matched evidence	Source	Conf.	Status	Action needed
R73	Include relevant case studies in the proposal. Submission	Relevant approved NetSuite case studies must be selected and included in the proposal. The currently matched assets are fictional ServiceNow/Salesforce materials and do not support CGC's NetSuite requirement.	—	No source matched	5%	Missing info	Select and insert approved, relevant NetSuite ERP case studies.
R74	Include key-person resumes in the proposal. Submission	The proposal will include approved resumes for Erin Wallace, Marcus Reed, Priya Nair, and Elena Torres.	The staffing confirmation identifies all four key people, but only Erin Wallace's approved resume is matched here.	Erin Wallace Resume	58%	Partial	Attach the approved resumes for Marcus Reed, Priya Nair, and Elena Torres in addition to Erin Wallace's resume.
R75	Include client references in the proposal. Submission	The proposal will include the authorized RedRock Industrial Supply and Meridian Specialty Foods client references, with full contact details from the approved reference sheet.	The approved reference sheet contains two authorized client references; Meridian separately confirms permission.	MoodSpace Approved Client References	99%	Ready	—
R76	Include proposal assumptions and exclusions in the proposal. Submission	Approved CGC-specific assumptions and exclusions must be added to the proposal.	—	No source matched	5%	Missing info	Compile and approve the complete Mood Space assumptions and exclusions section before submission.

R77	Include a pricing appendix in the proposal. Submission	The proposal will include a pricing appendix stating the USD 284,000 fixed fee, Net 30 terms, payment milestones and invoice triggers, out-of-scope hourly rates, travel treatment, assumptions, exclusions, change-control conditions, and 60-day price validity.	The approved commercial response provides all substantive content required for the pricing appendix.	MoodSpace CedarGrove Commercial Response Facts	98%	Ready	—
R78	Plan delivery around CGC providing business-process owners, finance leadership, warehouse and order-management SMEs, UAT participants, IT/security contacts, and an executive sponsor. Delivery	Delivery assumes CGC will provide business-process owners, finance leadership, warehouse and order-management SMEs, UAT participants, IT/security contacts, and an executive sponsor with timely participation in design, testing, decisions, and approvals.	The commercial response requires timely SME/UAT participation, source-system access, credentials, and environments; the methodology requires stakeholders, decision rights, client actions, UAT, and sign-off.	MoodSpace CedarGrove Commercial Response Facts	74%	Partial	Explicitly map each requested CGC role to responsibilities, estimated effort, and decision/approval obligations.
R79	Plan migration work around CGC providing Dynamics GP database/export access, sample extracts, data owners, and timely answers to mapping questions. Integration & Data	The migration plan should assume CGC provides Dynamics GP database/export access, sample extracts, assigned data owners, and timely answers to mapping questions. The matched assets establish secure data handling but not these specific client dependencies.	The security overview supports protected handling of credentials and exported data.	MoodSpace Security Privacy Insurance Overview	42%	Partial	Add the stated Dynamics GP access, sample-extract, data-owner, and mapping-response dependencies to the proposal assumptions and plan.
R80	Confirm final Salesforce field mappings and integration directionality during design workshops. Integration & Data	Final Salesforce field mappings, system-of-record ownership, and integration directionality will be confirmed during design workshops before build approval.	Priya Nair has relevant Salesforce- to- NetSuite synchronization experience, and the commercial response confirms supported interfaces for defined Salesforce flows.	Priya Nair Resume	82%	Partial	Finalize and approve field-level mappings, directionality, ownership, exception handling, and synchronization rules during design.

R81	Confirm final ADP payroll-journal detail during discovery. Integration & Data	Final ADP payroll-journal detail, including fields, aggregation, timing, accounting treatment, validation, and exception handling, will be confirmed during discovery.	RedRock demonstrates an ADP Workforce Now integration, and the commercial response includes ADP among the baseline supported interfaces.	RedRock Industrial Case Study	68%	Partial	Finalize and approve the ADP payroll-journal specification during discovery.
R82	Confirm final bank-specific file formats during discovery. Integration & Data	Final bank-specific payment and statement file formats, transmission methods, schedules, acknowledgements, validation rules, and exception handling will be confirmed with both banking partners during discovery.	The commercial response supports standard file-based interfaces, but the matched assets do not identify the two banks' formats.	MoodSpace CedarGrove Commercial Response Facts	55%	Partial	Obtain and approve both banks' file specifications and operating requirements during discovery.
R83	Plan onsite work to be limited to kickoff, selected workshops, and go-live support, with final travel dates agreed after award. Delivery	The delivery plan should limit onsite work to kickoff, selected workshops, and go-live support, with final travel dates agreed after award. The matched assets confirm kickoff staffing but do not establish this onsite-delivery commitment.	The team assignment confirms availability for kickoff and go-live-period engagement.	MoodSpace CedarGrove Team Assignment Availability	43%	Partial	Confirm the onsite-delivery model and include the post-award travel-scheduling process in the proposal.

Proposal Draft

Cedar Grove Components — NetSuite ERP Modernization Implementation Proposal

1. Executive Summary

Mood Space proposes to replace Cedar Grove Components' Microsoft Dynamics GP 2018 environment with Oracle NetSuite as its core cloud ERP, with production go-live within 24 weeks of the October 12, 2026 kickoff.

The program will address three-entity financial management, intercompany processing, consolidated reporting, order-to-cash, procure-to-pay, two-warehouse inventory, Fixed Assets Management, reporting, dashboards, integrations, data conversion, testing, training, cutover, and post-go-live transition.

The principal delivery risks are the compressed schedule; conversion of three years of detailed operational history and seven years of summarized GL history; unresolved Salesforce, ADP, and bank-interface specifications; and the availability of CGC decision-makers and business users. Our proposed plan places design decisions, source-data profiling, interface specifications, mock conversions, and client approvals on the critical path.

Mood Space is an Oracle NetSuite Alliance Partner with eight years of NetSuite delivery history, 31 completed implementations, and 11 manufacturing/ distribution implementations completed during 2022–2026. The proposed four workstream leads are confirmed for the October 12, 2026 kickoff through go-live and the 60-day hypercare period, subject to contract execution by October 2, 2026.

2. Understanding of Client Needs

CGC requires a controlled transition from Dynamics GP to a cloud ERP supporting approximately 165 named users, three legal entities, two warehouses, approximately 11,500 active SKUs, and approximately 2,800 active fixed assets.

The target solution must support:

- Financial management: GL, AP, AR, cash management, budgeting support, close, intercompany transactions, and consolidated reporting.
- Operations: sales orders, fulfillment, invoicing, credit controls, returns, customer visibility, requisitions, purchasing, receipts, matching, approvals, vendor billing, and payment preparation.
- Inventory and assets: warehouse transfers, cycle counting, replenishment, valuation, depreciation, asset transfers, retirements, and reporting. Mood Space has relevant multi-warehouse and fixed-assets experience; the exact 11,500-SKU and 2,800-asset designs remain to be validated.
- Integrations: Salesforce Sales Cloud, Avalara AvaTax, ADP Workforce Now, and secure payment and reconciliation exchanges with two banks. Salesforce and Avalara experience is established; employee-related ADP flows and bank-specific interface designs require confirmation.
- Data: master data, open transactions, inventory and fixed-asset balances, three years of operational history, and seven years of summarized GL history. Prior evidence covers three years of operational history; the seven-year summarized GL approach requires detailed validation.
- Adoption and controls: role-based reporting, dashboards, testing, cutover, training, change readiness, administrator handoff, and reduced spreadsheet dependency without weakening business controls.

3. Proposed Approach

Mood Space proposes its six-phase NetSuite delivery standard: Mobilize and Govern; Discover and Design; Configure and Build; Test and Convert; Cutover and Go-Live; and Hypercare and Handoff.

Design and configuration

-

Conduct fit-to-standard workshops and document process decisions, configuration workbooks, integration and data designs, reporting definitions, demonstrations, and formal design approval.

- Apply a configure- before- customize decision model. Any proposed SuiteScript or customization will be recorded with purpose, owner, alternatives considered, support implications, upgrade impact, test requirements, and approval status.
- Confirm Salesforce field mappings and directionality, ADP payroll-journal detail, employee-related financial flows, and bank formats during discovery.

Migration

- Proposed activities include profiling, mapping, cleansing ownership, transformation rules, mock conversions, exception management, reconciliation, cutover conversion, and business sign-off.
- CGC will provide Dynamics GP database/export access, sample extracts, data owners, and timely mapping decisions.
- [Confirm the approved detailed approach for all required data objects and seven years of summarized GL history.]

Testing and acceptance

- Perform configuration testing, integration testing, migration validation, end-to-end testing, and UAT using requirement-linked scenarios.
- Manage defects by severity and owner, with documented entry/exit criteria and formal business sign-off before production cutover.

Cutover

- Prepare an owner-based runbook covering sequence, data freeze, final extraction and migration, reconciliation, communications, go/no-go criteria, fallback procedures, deployment, and transition into hypercare.

Security and data handling

- Use company-managed encrypted endpoints, MFA, least-privilege access, secure credential handling, restricted client-environment access, and encrypted data transfer.
- Mood Space will not use CGC data to train public AI models. No subcontractors or AI/model providers are planned to process CGC production data.

4. Workstreams / Delivery Phases

1. Program Governance — integrated plan, weekly status, RAID management, decision log, change control, steering committee, financial tracking, dependencies, and executive escalation.
2. Finance and Multi-Entity — GL, AP, AR, cash management, budgeting support, close, three-entity structures, intercompany processing, consolidation, and financial reporting.
3. Order-to-Cash and Procure-to-Pay — fit-to-standard design for order management, fulfillment, invoicing, credit controls, returns, customer visibility, requisitions, purchasing, receipts, matching, approvals, vendor bills, and payment preparation. [Confirm the detailed design for functions not yet evidenced across the complete requested process.]
4. Inventory and Fixed Assets — two-warehouse inventory, transfers, cycle counting, replenishment, valuation, and approximately 2,800 assets. [Validate SKU and asset scale, warehouse mobility/WMS requirements, and detailed transfer, retirement, and valuation rules.]
5. Integrations — Salesforce, Avalara, ADP, and two bank interfaces using supported APIs and secure files where applicable. Bank-specific formats, approvals, payment types, and reconciliation requirements remain discovery decisions.
6. Data Migration — master data, open transactions, inventory and fixed-asset balances, operational history, summarized GL history, mock conversions, exception resolution, reconciliation, and sign-off.
- 7.

Reporting and Dashboards — consolidated financial statements, aging, cash, sales and margin, inventory, open orders, purchasing, warehouse reporting, and role-based dashboards. [Approve the report and dashboard catalogue, KPIs, filters, and role access.]

8. Testing, Cutover, and Controls — test management, UAT, security-role validation, reconciliation, cutover rehearsal, go/no-go, rollback readiness, and production deployment.
9. Change, Training, and Handoff — stakeholder communications, role impacts, readiness checks, role-based curricula, job aids, recorded materials where appropriate, super-user support, train-the-trainer delivery, and administrator handoff. [Confirm CGC-specific adoption measures and final handoff acceptance criteria.]

5. Timeline

The following is Mood Space's proposed 24-week plan. The detailed baseline, dependencies, decision dates, and client resource assignments will require joint approval during mobilization.

- Week 1: Kickoff on October 12, 2026; governance, environments, scope baseline, RAID log, decision rights, and access plan.
- Week 2: Current-state discovery; data inventory; integration inventory; reporting and control requirements.
- Week 3: Finance, entity, intercompany, consolidation, budgeting, and close design.
- Week 4: Order-to-cash and procure-to-pay design; process decisions documented.
- Week 5: Inventory, warehouse, replenishment, valuation, and fixed-assets design.
- Week 6: Salesforce, Avalara, ADP, bank, migration, reporting, dashboard, and security design.
- Week 7: Design playback and formal approval. Milestone: solution-design sign-off.
- Week 8: Configuration Sprint 1; source-data profiling; initial mapping; interface specifications finalized.
- Week 9: Finance and multi-entity configuration; initial master-data conversion development.
- Week 10: Order, procurement, inventory, and fixed-assets configuration.
- Week 11: Integration build; migration transformations; report and dashboard development.
- Week 12: Configuration demonstrations and Sprint 2 completion. Milestone: configuration baseline.
- Week 13: Configuration and integration testing; Mock Conversion 1.
- Week 14: Defect correction; integration retest; migration exceptions resolved.
- Week 15: Mock Conversion 2; reconciliation; UAT preparation; training content review.
- Week 16: End-to-end Test Cycle 1, including financial and operational scenarios.
- Week 17: End-to-end Test Cycle 2; security roles, controls, performance, and regression testing.
- Week 18: UAT begins; daily defect triage; role-based training delivery begins.
- Week 19: UAT continues; priority defects resolved; cutover plan and rollback procedures refined.
- Week 20: UAT completion and sign-off; formal cutover rehearsal. Milestone: business acceptance.
- Week 21: Final training, readiness checks, production data preparation, and open-item closure.
- Week 22: Cutover-readiness review; final source extracts validated; preliminary go/no-go decision.
- Week 23: Data freeze preparation, final communications, migration staging, and production readiness.
- Week 24: Final conversion, reconciliation, go/no-go approval, production go-live, and hypercare launch.

Critical-path dependencies include timely environment access, design decisions by Week 7, finalized interface specifications by Week 8, usable legacy extracts, successful mock conversions, UAT participation and sign-off, and cutover readiness. CGC responsibilities include providing process owners, finance and operational SMEs, data owners, IT/security contacts, UAT participants, an executive sponsor, and timely decisions.

The proposed post-go-live period is 60 calendar days. The four named leads are available through that period. [Confirm business-hours coverage, P1 response and escalation targets, daily/weekly triage cadence, knowledge-transfer deliverables, and steady-state support ownership.]

6. Team & Roles

- Erin Wallace — NetSuite Solution Architect. Principal NetSuite Solution Architect with 14 years of enterprise- applications experience and nine years of NetSuite experience. Current NetSuite Certified ERP Consultant and SuiteFoundation certifications. Accountable for solution integrity, fit-to-standard design, configuration decisions, and design approval.
- Marcus Reed — Project Manager. Senior ERP Project Manager with 12 years of enterprise-software implementation management experience and eight completed NetSuite programs. PMP and Certified ScrumMaster. Accountable for the integrated plan, governance, RAID, dependencies, change control, UAT, cutover, steering committees, and escalation.
- Priya Nair — Integration & Data Lead. Senior NetSuite Integration & Data Lead with 11 years of integration/data engineering experience, including seven years with NetSuite. Experience includes SuiteTalk REST/SOAP, RESTlets, SuiteCloud, middleware, SFTP/file integrations, Salesforce, Avalara, ADP, banking files, and Dynamics GP conversion. Accountable for integration architecture, data conversion, reconciliation, and technical cutover.
- Elena Torres — Change & Training Lead. Change, Training & Adoption Lead with 13 years of enterprise-software change and enablement experience and Prosci Change Management Practitioner certification. Accountable for role impacts, communications, readiness, role-based training, job aids, adoption tracking, and trainer/administrator handoff.

All four leads are confirmed from the October 12, 2026 kickoff through go-live and 60-day hypercare, subject to contract execution by October 2, 2026. Supplemental functional consultants, integration/data engineers, test support, and training resources will be assigned according to the approved plan. [Confirm names, allocation percentages, locations, and backup coverage for supplemental roles.]

Proposed governance includes weekly project status and workstream meetings, RAID and decision-log review, written change control, steering-committee cadence, and executive escalation. Four accountable workstream leads are identified; [confirm CGC governance roles, decision rights, meeting cadence, and escalation paths].

7. Relevant Experience

Mood Space is an Oracle NetSuite Alliance Partner with eight years of delivery history and 31 completed NetSuite implementations. Its record includes programs with 45–420 named ERP users, one to six legal entities, and schedules of 14–36 weeks, including 11 manufacturing/ distribution implementations completed during 2022–2026.

RedRock Industrial Supply — Industrial distribution; 185 users, three entities, two warehouses, and 22 weeks to go-live. Replaced Dynamics GP and spreadsheet-based processes with NetSuite financials, consolidation, order management, procurement, inventory, fixed assets, reporting, Salesforce, Avalara, ADP, and two banking integrations. Go-live reconciliation reached 99.9% before sign-off, and the 60-day hypercare period closed with no open severity-1 defects.

Meridian Specialty Foods — Food manufacturing and distribution; 132 users, four entities, three warehouses, and 24 weeks to go-live. Scope included financials, multi-entity consolidation, distribution, data migration, Avalara, payroll journals, banking files, CRM integration, training, and 60 days of hypercare. Consolidated reporting was accepted before go-live, and UAT passed all critical scenarios. This engagement meets CGC's requirement for a manufacturing/ distribution case with at least 100 users, multi-entity financials, data migration, and at least two integrations.

Summit Equipment Services — Equipment services and parts distribution; 108 users, two entities, two warehouses, and 19 weeks to go-live. Scope included financials, procurement, inventory, fixed assets, order management, reporting, GP migration, three years of operational history, bank files, and a tax-engine integration. [Confirm Summit's inclusion as the third approved case study required in the final proposal attachment.]

Two approved references are available from RedRock Industrial Supply and Meridian Specialty Foods; contact details are provided in the reference attachment.

Scope Assumptions

Assumptions

- Project kickoff is targeted for October 12, 2026, with production go-live within 24 weeks of kickoff. [Confirm whether all entities, integrations, historical data, reports, and Fixed Assets Management must go live in one release without phasing.]
- Scope covers approximately 165 named users, 11,500 active SKUs, two warehouses, three legal entities, and 2,800 active fixed assets.
- CGC will provide Dynamics GP database/export access, sample extracts, available historical data, data owners, and timely responses to mapping and reconciliation questions.
- CGC will provide business-process owners, finance leadership, warehouse and order-management SMEs, UAT participants, IT/security contacts, and an executive sponsor.
- The schedule depends on timely CGC decisions, approvals, access, test participation, and business sign-offs. [Confirm UAT duration, participant availability, and decision-turnaround expectations.]
- A configure- before- customize approach will be used. Any proposed SuiteScript or other customization will require documentation of maintainability and upgrade impacts and approval through change control.
- Salesforce field mappings, systems of record, directionality, synchronization frequency, and error handling will be finalized during design workshops.
- ADP payroll-journal detail, employee-related financial flows, employee-data handling, and interface method will be finalized during discovery.
- Banking partners, bank-specific file formats, payment types, statement formats, approval requirements, and use of NetSuite Banking SuiteApps will be finalized during discovery.
- Migration scope assumes source data is available and usable for profiling, transformation, conversion, and reconciliation. [Confirm legacy-data quality, attachment/document migration, retention obligations, and responsibility for source-data remediation.]
- [Confirm the intended NetSuite edition, licensed modules, required SuiteApps, integration platform, number of environments, and environment-refresh requirements.]
- [Confirm whether warehouse mobility, barcode scanning, WMS, lot/serial tracking, bin management, or other advanced inventory capabilities are required.]
- Delivery will be remote-first, with onsite activity limited to kickoff, selected workshops, and go-live support. Final locations and dates will be agreed after award; approved travel is reimbursed at actual cost without markup. [Confirm travel budget and expected onsite frequency.]
- Hypercare will run for 60 calendar days after go-live. [Confirm business-hours coverage, time zone, P1 response and escalation targets, triage cadence, and steady-state support owner.]
- The proposed key team is available from the October 12, 2026 kickoff through the 60-day hypercare period, subject to contract execution by October 2, 2026.

Inclusions

- Replacement of Microsoft Dynamics GP 2018 with Oracle NetSuite as CGC's core cloud ERP.
- NetSuite Financial Management covering general ledger, accounts payable, accounts receivable, cash management, budgeting support, and financial close.
- Multi-entity financial management for three legal entities, including intercompany processing and consolidated reporting.
- Order-to-cash covering sales orders, fulfillment, invoicing, credit controls, returns, and customer account visibility, subject to design validation.

- Procure-to-pay covering requisitions, purchase orders, receipts, three-way matching, vendor bills, approvals, and payment preparation, subject to design validation.
- Inventory management for approximately 11,500 active SKUs across two warehouses, including transfers, cycle counting, replenishment parameters, and inventory valuation.
- NetSuite Fixed Assets Management for approximately 2,800 active assets, including depreciation, transfers, retirements, and reporting.
- Supported integrations with Salesforce Sales Cloud, Avalara AvaTax, ADP Workforce Now, and secure payment and bank- statement/ reconciliation file exchanges with two banking partners.
- Migration of customers, vendors, items, chart of accounts, open AR/AP, open sales and purchase orders, inventory balances, and fixed-asset master data.
- Migration of three years of detailed operational history and seven years of summarized general-ledger history.
- Data-migration activities covering profiling, mapping, cleansing, mock conversions, reconciliation, exception handling, cutover, and CGC business sign-off.
- Finance and operations reporting covering consolidated P&L and balance sheet, AP/AR aging, cash position, sales and margin, inventory valuation and turns, open orders, purchasing, and warehouse performance.
- Role-based dashboards for CFO/Controller, finance, operations leadership, warehouse management, and customer- service/ order- management users. [Confirm dashboard catalogue, KPIs, filters, and access by role.]
- Solution design, configuration, demonstrations, testing, migration validation, UAT support, defect management, cutover, rollback planning, and governance.
- Role-based training for finance, operations, warehouse, managers, administrators, and train-the-trainer participants, including job aids and recorded materials where appropriate.
- Change and adoption activities covering stakeholder communications, role impacts, readiness checks, adoption measures, super-user/champion support, and go-live reinforcement. [Confirm the CGC-specific readiness criteria and adoption measures.]
- Sixty calendar days of post-go-live hypercare, including knowledge transfer and administrator handoff before hypercare ends. [Confirm the detailed support and transition model.]

Exclusions

- Oracle NetSuite, SuiteApp, middleware, Avalara, Salesforce, ADP, banking, or other third-party software licenses and subscription fees are excluded from the implementation services fee.
- Custom applications and unlisted custom development are excluded unless approved through written change control.
- Capabilities not expressly listed in the baseline scope are excluded pending confirmation, including [confirm warehouse mobility, barcode scanning, WMS, lot/serial tracking, bin management, and advanced inventory features].
- Reconstruction of legacy data that cannot be extracted or supplied from Dynamics GP or other source systems is excluded.
- [Confirm whether source-data remediation beyond agreed migration cleansing and transformation is excluded and define the boundary.]
- [Confirm whether attachments, documents, archived reports, and other unlisted historical content are excluded from migration.]
- Interfaces, data flows, bank formats, reports, dashboards, entities, warehouses, or data objects not identified in the agreed baseline design are excluded unless added through change control.
- Steady-state managed support and support extending beyond the 60-calendar-day hypercare period are excluded.
- Onsite work beyond kickoff, agreed selected workshops, and agreed go-live support is excluded unless separately approved; associated approved travel is reimbursable at actual cost without markup.

Evidence Recommendations

Recommended Personnel Evidence

Priya Nair — Strong fit

Priya is the approved Senior NetSuite Integration & Data Lead, with 11 years of integration/data engineering experience and 7 years with NetSuite. Her resume directly documents SuiteCloud/API skills, ERP migration, Salesforce synchronization, Avalara, ADP payroll journals, banking file interfaces, and confirmed availability.

Erin Wallace — Strong fit

Erin is the approved Principal NetSuite Solution Architect, with 14 years of enterprise- applications experience and 9 years with NetSuite. She holds both certifications required by the RFP and cites a 185-user, three-entity industrial-supply implementation plus four manufacturing/ distribution NetSuite programs since 2023.

Elena Torres — Strong fit

Elena is the approved Change, Training & Adoption Lead, with 13 years of enterprise-software change and enablement experience. Her resume directly covers role impacts, communications, readiness, super-user support, role-based curricula, adoption materials, reinforcement, and administrator/trainer handoff for NetSuite programs.

Marcus Reed — Strong fit

Marcus is the approved Senior ERP Project Manager, with 12 years of enterprise-software implementation management and eight completed NetSuite programs. His resume includes 22-week and 24-week NetSuite programs and directly documents governance, planning, dependencies, UAT, cutover, hypercare, change control, and escalation.

Relevant Project Evidence

Case Study: RedRock Industrial Supply NetSuite ERP Modernization — Strong fit

Directly comparable approved evidence: an industrial distributor with 185 named ERP users, three legal entities, and two warehouses replaced Dynamics GP and spreadsheet-based processes with NetSuite in 22 weeks. Scope included financials, consolidation, AP/AR, order management, procurement, inventory, fixed assets, reporting, Salesforce, Avalara, ADP, and two banking partners, followed by 60 days of hypercare.

Case Study: Meridian Specialty Foods NetSuite Multi-Entity Finance & Distribution — Strong fit

Approved NetSuite evidence for a food manufacturing and distribution company with 132 named ERP users, four legal entities, and three warehouses. The 24-week engagement covered financials, multi-entity consolidation, distribution capabilities, data migration, four external integration areas, role-based training, formal conversion and cutover preparation, and 60 days of hypercare.

Case Study: Summit Equipment Services NetSuite Financials, Inventory & Fixed Assets — Partial fit

Relevant approved NetSuite evidence for an equipment-services and parts-distribution company with 108 users, two entities, and two warehouses. The 19-week project included financials, AP/AR, procurement, inventory, fixed assets, order management, reporting, Dynamics GP migration, three years of operational history, bank files, a tax engine, UAT, training, cutover, hypercare, and administrator handoff.

Limitations: The engagement had two entities rather than CGC's three and does not state multi-entity consolidation or intercompany scope. It does not include Salesforce or ADP integrations, identify the tax engine as Avalara, establish two banking partners, show seven years of summarized GL history, or confirm the 11,500-SKU and 2,800-asset scale. Hypercare lasted 45 days rather than the required 60 days. The stated scopes do not prove every requested order-to-cash, procure-to-pay, inventory, or fixed-assets function.

Do Not Use As Direct Evidence

Leah Brooks — The resume is explicitly fictional demonstration content and states that no real person is represented. It does not identify Leah as an approved CGC team member, its examples concern ServiceNow and Salesforce rather than NetSuite, and availability requires confirmation. It should not be submitted as direct staffing evidence.

Daniel Ortiz — The resume is explicitly fictional demonstration content and does not represent a real person. It establishes only 5 years on ServiceNow programs, not experience on at least three NetSuite programs; availability also requires confirmation. It should not be used as evidence for the CGC Project Manager role.

Maya Chen — The resume is explicitly fictional demonstration content and does not represent a real person. It does not establish NetSuite experience or the required NetSuite Certified ERP Consultant and SuiteFoundation certifications, and availability is unconfirmed. It should not be used as evidence for the NetSuite Solution Architect role.

Case Study: Greenline Mutual Insurance ServiceNow CMDB, Change & Operational Reporting — This is fictional demonstration content for an insurance organization using ServiceNow ITSM/CMDB. It does not establish NetSuite ERP, manufacturing/ distribution, financials, inventory, fixed assets, Dynamics GP migration, or the required 60-day hypercare commitment. Do not use it as client evidence.

Case Study: HarborPoint Transit Authority ServiceNow ITSM Modernization — This is fictional demonstration content for a public transportation organization using ServiceNow ITSM. It does not establish NetSuite ERP, manufacturing/ distribution, multi-entity financials, Dynamics GP migration, inventory, fixed assets, the required integrations, or 60-day hypercare. Do not use it as client evidence.

Case Study: Beacon Health Network Salesforce Service Cloud Customer-Service Transformation — This is fictional demonstration content for a healthcare-services organization using Salesforce Service Cloud. It does not establish a Salesforce Sales Cloud-to-NetSuite integration or any NetSuite ERP, manufacturing/ distribution, financials, inventory, fixed-assets, Dynamics GP migration, or multi-entity delivery capability. Do not use it as client evidence.

Clarifying Questions

Critical Before Submission

- Please confirm the intended NetSuite edition, licensed modules, required SuiteApps, and whether CGC has selected an integration platform or expects the vendor to recommend one.
- Please confirm whether manufacturing functionality is in scope. If so, identify required processes (for example, BOMs, work orders, routings, production planning, subcontracting, and shop-floor transactions).
- For inventory and the two warehouses, please confirm whether warehouse mobility, barcode scanning, WMS, bin management, lot/serial tracking, advanced inventory, demand planning, or other advanced inventory capabilities are required.
- Please provide the three legal entities' operating model, including currencies, tax registrations, fiscal calendars, intercompany transaction types, transfer- pricing/ elimination requirements, and consolidation/ reporting requirements.
- Please confirm the required design for order-to-cash, including credit-control rules, returns/RMA processes, fulfillment methods, customer account visibility, approvals, and any pricing or discounting requirements.
- Please confirm the required design for procure-to-pay, including requisitions, approval hierarchies, receiving, three-way-match tolerances, vendor-bill processing, payment preparation, and exceptions.
- Please provide the Salesforce integration architecture and confirm the system of record, object/field scope, directionality, sync frequency, event or batch expectations, ownership of mappings, error handling/ reprocessing, and reconciliation requirements.
- Please confirm the ADP Workforce Now interface scope: payroll-journal detail and frequency, employee-related financial data flows, employee-data handling constraints, required approvals, and preferred interface method.
- Please identify both banking partners and confirm payment types, payment-file and bank- statement/ reconciliation formats, transmission method, signing/encryption requirements, approval controls, test-environment availability, and whether NetSuite Banking SuiteApps are acceptable.
- Please confirm the Avalara AvaTax scope, including jurisdictions, transaction types, exemption-certificate handling, tax reporting responsibilities, and any existing AvaTax configuration to be retained or redesigned.
- Please confirm which operational-history objects comprise the required three years of detailed history, the required level of detail for seven years of summarized GL history, reporting/performance expectations for this history, and reconciliation/ sign- off criteria.
- Please confirm whether the 24-week production go-live target includes all three entities, all integrations, the full historical migration, all reporting/dashboards, Fixed Assets, and both warehouses, or whether any scope may be phased after go-live.
- Please confirm required reporting definitions, KPI calculations, drill-down/detail needs, refresh frequency, role access, and acceptance criteria for each required finance and operations report and dashboard.
- Please confirm UAT duration, expected participant counts and availability, test-data/environment requirements, defect-severity definitions, decision turnaround expectations, and CGC responsibilities required to maintain the 24-week critical path.
- Please confirm the desired cutover window, blackout periods, fiscal-close or inventory-count constraints, acceptable data-freeze duration, go/no-go authority, rollback tolerance, and required business continuity procedures.
- Please identify CGC's executive sponsor, steering-committee members, business-process owners, finance/ warehouse/ order- management SMEs, IT/security contacts, data owners, and decision makers, and confirm their expected availability during design, testing, cutover, and hypercare.
- Please provide CGC's required security questionnaires, insurance limits, access/onboarding requirements, data-residency or handling constraints, and confirm whether SOC 2 Type II and/or ISO 27001 is mandatory or informational.

- Please provide the standard confidentiality, data-protection, and non-solicitation terms; required proposal forms; commercial contract terms; payment and invoicing requirements; and the required process and deadline for exceptions or markup.
- Please confirm onsite locations, expected onsite activities and frequency for kickoff, selected workshops, and go-live support; travel approval process; and whether CGC has a travel budget or policy that bidders must follow.

Secondary Clarification

- For Fixed Assets Management, please confirm the asset classes, depreciation books/methods, capitalization policies, transfer/retirement workflows, and reporting requirements for the approximately 2,800 active assets.
- Please provide the available Dynamics GP source environments and extracts; identify data owners; and confirm data quality, attachment/document migration needs, retention obligations, historical-data volumes, and the treatment of unavailable or incomplete source data.
- Please confirm hypercare business-hours coverage, time zone, support channels, P1 response and escalation targets, daily/weekly triage cadence, success/exit criteria, and the CGC owner for steady-state support after handoff.

Client Email

Subject: Cedar Grove Components NetSuite ERP Modernization Proposal

Dear [Client Contact Name],

Thank you for the opportunity to submit our proposal for Cedar Grove Components' NetSuite ERP modernization. We understand CGC is seeking to replace Dynamics GP 2018 with NetSuite across three legal entities, including financials, order-to-cash, procure-to-pay, two-warehouse inventory, fixed assets, reporting, data migration, and integrations with Salesforce, Avalara, ADP Workforce Now, and two banking partners.

We also understand the importance of a disciplined 24-week path to production go-live from the October 12, 2026 target kickoff, followed by 60 calendar days of hypercare and administrator handoff.

To finalize a feasible integration and cutover plan, please clarify:

1. The intended NetSuite edition, licensed modules, required SuiteApps, and whether warehouse mobility, barcode scanning, WMS, lot/serial tracking, bin management, or advanced inventory are in scope.
2. The banking partners, required payment and statement/ reconciliation file formats, approval requirements, and whether NetSuite Banking SuiteApps are acceptable.

We propose a focused [30/60]-minute clarification session with CGC's finance, operations, IT, and integration stakeholders before [August 28, 2026, 3:00 PM ET] to confirm these items and any related assumptions. Please let us know a suitable time.

Sincerely,

[Sender Name]

[Title]

Mood Space

[Email] | [Phone]