

Guide to Starting a NetSuite User Group

User Groups are a great resource for sharing lessons learned and best practices in implementing and troubleshooting your NetSuite tools. You will learn the latest tips and techniques and share advice on implementing, deploying and maintaining NetSuite technology, helping all group members make the most of their solutions.

This guide will tell you everything you need to know about starting a NetSuite User Group in your area.

NetSuite Support

NetSuite understands the value of user groups and provides the following services and resources to assist you to start your group:

- Production account
- Demo account
- Assistance with membership recruitment
- NetSuite speakers
- Annual User Group conference discount

NetSuite has identified several key factors that will help you create and sustain a successful user group. The first step is to complete the User Group application form (**Appendix no. 1**). NetSuite will endeavor to approve applications within **two weeks**. Once your group is approved, you will need to form an association to obtain the NetSuite assistance described below. Please consult an adviser to determine the appropriate legal form (such as a nonprofit business association) to authorize entry into an agreement with NetSuite. See “Legal Considerations” below.

Production Account

NetSuite will provide a production account to each User Group to track membership and fees, host your website, house content files, etc. NetSuite will provision up to six users on each production account. We suggest giving each board member access to the production account.

Demo Account

NetSuite will provide a free demo account to each user group to demo during User Group meetings. NetSuite will provision the demo account for up to three users.

Members Mailing List

NetSuite cannot provide customer lists or contact information but will assist you by doing special email blasts to current customers, up to four blasts per year. Each user group is responsible for keeping its own mailing list of members and notifying them of upcoming meetings.

Content for email blasts must be received by NetSuite at least three weeks prior to date of the proposed blast. (For example, if you would like your email blast to go out two weeks prior to your event, NetSuite needs to receive your email content five weeks prior to the event date). The NetSuite marketing communications group will review and approve content and provide you with an HTML version of the invite. NetSuite’s review should not be construed as NetSuite’s speaking on behalf of the user group. NetSuite’s review is to confirm compliance with the terms of use for access to NetSuite’s website and the hosting service it provides to user groups. A link to NetSuite’s Terms of Use is provided on NetSuite’s website. Registrations must link to the production account provided to each User Group by NetSuite or an email address that is for the User Group only.

Group Listing on NetSuite Website

(Going live fall 2012): All active NetSuite user groups will be listed on the NetSuite.com site. It is important for groups to keep their sites updated with the most current meeting information, including the most current meeting date, meeting agenda and meeting location.

NetSuite Speakers

Due to the large number of groups, each group is responsible for providing its own speakers. On occasion, NetSuite may be able to provide a speaker to the group for specific topics. Requests must be received at least three months prior to the meeting to allow for scheduling, using the form attached. Please work with your NetSuite User Group liaison ([email: nsusergroups@netsuite.com](mailto:nsusergroups@netsuite.com)) when requesting a NetSuite speaker for your user group meetings. Please note: We cannot always guarantee speakers for particular events. We ask that your group be flexible regarding the meeting day or time, if need be, to accommodate a NetSuite speaker.

Annual User Group Conference Discount

User Groups will be provided with a limited number of 30% off group discount passes for the annual user group conference.

Take the Next Step: Apply to Start a Group

NetSuite only recognizes one user group for each metropolitan area. Check the listings of user groups to see if a group already exists in your area. If you don't see a group listed in your area and are interested in starting one, fill out the User Group Application ([Appendix no. 1](#)). NetSuite will review your application and request more information, if necessary.

Suggestions for Running a Successful User Group

There are a number of considerations to take into account as you begin to form your user group

Questionnaire

You may want to send out a questionnaire to measure the potential interest in your proposed user group and to identify the activities that will encourage persons to want to be part of your group ([Appendix no. 2](#)).

Core Team

Form a core team to discuss and determine the following considerations. (The purpose of the first user group meeting should be to discuss these considerations and the core team may be the only persons at this meeting for the purposes of planning).

What Is the Purpose of Your User Group

- To network
- To educate members
- To create a collective, unified voice in your user community
- Social activity

How Will Your Group Govern Itself?

- A legal entity (such as a nonprofit business association) must be formed so that your user group can enter into the User Group Program Agreement with NetSuite.
- Who will serve on the entity's Board of Directors?
- How frequently should you hold conference calls and/or meetings?
- How long should each meeting/conference call last?

Membership Considerations

What type of memberships does your group want to offer: individual, vendor, corporate?

Should You Limit the Total Number of Members?

- Could there potentially be a problem with space?

What Core Services Should Your Group Offer?

- Quarterly, monthly, bi-monthly meetings?
- What type of discussions will be conducted?
- Should your group produce a newsletter? If so, how frequently?
- Training/education for your members?
- Website or other discussion forum (e.g., Facebook, LinkedIn)?

Funding

User groups aim to be financially self-sufficient, thus, many groups elect to have annual dues to cover facilities, equipment, supplies, copying costs, name tags, refreshments, etc.

Building a Board of Directors or Steering Committee

We suggest that each group nominate or elect a Board of Directors (BOD) or a Steering Committee to share some of the group management duties. It is recommended to nominate or elect two to four members to form the Board or Steering Committee with the members being from different companies. Two-year terms are suggested to stagger the leadership and to provide continuity and fresh ideas. Board members and officers can either be elected or appointed but should be announced to the group so that all members have a chance to participate.

Board of Director or Steering Committee Membership Roles & Responsibilities

- Create agenda content for meeting
 - Invite guest speakers as appropriate
- Vote on general issues
- Create and maintain master calendar
- Secure venue for meetings (central location or rotate location at customer sites and NetSuite office, if available)
- Responsible for the following meeting logistics:
 - Obtain presentations from customers and NetSuite (if required)
 - On-site facilitation of meeting to include chairing meeting and staffing of registration area
 - Ensure minutes are recorded and action items are followed up
 - Ensure fiscal responsibility

Officers can either be elected or appointed, but it is important to clearly define each position's responsibilities so members know what to expect before agreeing to serve.

The following are common positions on a Board of Directors or Steering Committee with associated duties (any may be combined):

Board of Directors or Steering Committee Members

President or Chairperson

A one- to two-year rotational assignment depending on applicability to person's job assignment.

- Primary person to communicate with User Group membership
- Act as liaison with NetSuite
- Oversee all operations of User Group
- Create user group meetings agenda
 - Email NetSuite for email blast
 - Upload to website
- Upload to documents folder
- Create BOD meetings agenda and organize virtual meetings at least once per month among Board members
- Manage the user group info mailbox and forward email to appropriate board member
- Votes in case of tie

Vice President or Co-Chairperson

- Assume responsibilities of the Chairperson if he/she is unable to attend a meeting or fulfill the responsibility
- Assist and support the President or Chairperson
- Coordinate topics for meetings
- Provide presentation outlines for each topic and distribute outlines
- Coordinate and schedule monthly speakers (this can also be done by a Speaker Chair)

Treasurer

- Responsible for all funds and securities pertaining to the User Group
- Responsible for receiving and giving receipts for monies due and payable to the User Group
- Responsible for depositing such monies into a bank account in the name of the User Group
- Reconcile bank statements in NetSuite
- Receive and process payments (PayPal and checks)
- Convert registrations to members and process cash sales
- Responsible for developing financial plans and budgets
- Responsible for submitting financial reports to the Board of Directors or Steering Committee at its regular meeting and to the membership during a meeting
- Manage the reimbursement for expenses to BOD members Manage the treasurer@usergroup.org mailbox
- Yearly tax reporting (a nonprofit business association typically requests tax-exempt status)

Recording Secretary

- Responsible for setting up monthly BOD meeting calls and managing the RSVPs for the meeting
- Record minutes at BOD meetings
- Publish minutes to the BOD
- Record meeting minutes and document information discussed and decided upon at all User Group meetings
- Publish minutes
- Upload minutes to production NetSuite account
- Manage the User Group action item list
- Maintain all other User Group documents such as charters, by-laws, etc.
- Responsible for the management and maintenance of the membership list and monthly meeting reminders (this can also be done by a Membership Chair)
- Responsible for printing name tags for monthly meeting and managing the name tag file box (if applicable). Works with Membership Chair to get names for tags

Membership Chair

- Responsible for the management and maintenance of the membership list
- Responsible for providing membership reports to the BOD and at the User Group meetings
- Manage the RSVPs for user group meetings:
 - Invitations to upcoming user group meeting
 - Reminder email about upcoming meeting (a few days before meeting)
 - Update the BOD with the RSVP count in progress and then final count before meeting
- Follow-up with guests from user group meeting to get them to join
- Manage the member registration process including:
 - Alert customers (members) who have registered but not paid
 - Alert members about upcoming renewals
- Manage the rsvp@usergroup.org mailbox
- Manage the membership@usergroup.org mailbox
- Sends monthly meeting reminders

Speaker Chair

- Review presentation ideas and present to the board for three months out. Provide ideas for presentations (some training, mix of functional and technical, process flow—new or not working, integration)
- Coordinate and schedule monthly speakers
- Coordinate with Chairperson for NetSuite presentations
- Ensure backup presentation in case of last-minute cancellation
- Work with speaker to be sure the speaker is on track for presentation. (Presentations need to be reviewed by Board before final agenda confirmation of speaker's presentation)
- Provide presentation outlines/presentations for each topic (where appropriate) and distribute them
- Provide temporary access to demo account (assign username/password to be deleted afterwards)

Webmaster/Technical Advisor

- Keep website current with agendas, presentations, documents and meeting notices, etc.
- Technical workarounds for website
- Responsible for Tips & Tricks and Q&A section of user group meeting

Membership Roles & Responsibilities

- Participation in meetings
- Willingness to serve on Board of Directors or Steering Committee
- Contribute content ideas for meetings and be willing to present (if applicable)
- Keep dues current

Host Site Roles & Responsibilities

Hosting Company General Information

Company Name: _____

Address: _____

Contact Name: _____

Email address: _____

Work phone: _____

Phone number for after hours contact: _____

- Provide ample meeting space with seating for all attendees—classroom style with space outside the meeting room for a registration area
- Provide meeting space with full AV capability (LCD projection, etc.)

AV/Technical Questions

- Wireless internet access?
 - If NO, do you have extra cables?
- Internet access through special software?
 - If YES
 - Can we load it ahead of time?
 - Or will host provide a laptop?
- Projection device?
- Speaker phone (if recording the presentation)?
- Laptop provided (optional)?
- Enough electrical outlets for people to bring laptops (e.g. recorder, presenter)

Food & Beverage

- Plan menus and provide beverages for meeting start
 - Is there a place to put beverages and snacks in the room? If not, then close to the room?
- Provide an additional room for a sit-down lunch and provide lunch food and beverages if lunch is being served

Other Site Questions

- White board (not required, but nice to have)
- Table space for recorder and presenters?
- What time are the building doors locked?
- What time is the office locked?
- Procedure for after hours entrance or late arrival (if applicable)
- How many places should we post signs (e.g. after hours call....)
- Can board members and presenter get in by 5:30 pm?
- Where are the bathrooms located in proximity to the room where the meeting will be held? If using the bathroom, will they be able to get back into the meeting easily? This is so the chair can let people know of potential bathroom issues when the meeting begins.

Board Member Responsibilities

- Provide hosting company address to Chairperson and Membership Chair as soon as you know it, along with special after hours instructions
- Provide final count morning prior to the meeting
- Provide name of host to Chairperson to announce and thank
- Coordinate food and beverages for the meeting
- Print out appropriate number of signs and post them at the proper places (download Signs.ppt from "board folder" and modify)

Rules for Starting and Maintaining a User Group

General

Partners of NetSuite that start a user group are required to have a customer counterpart. A NetSuite "Partner" is a member of a NetSuite partner program, such as a Solution Provider, Referral Partner, System Integrator or Developer.

All Partners applying to start a user group must be deemed in good standing with NetSuite.

Partners are not allowed to use User Group meetings as a lead-generating activity for their company. These groups are meant to be a resource for current users to give them a local presence and objective, unbiased information.

Chairperson of the Board can only serve a two-year term. After that time, Board members will elect a new Chairperson. If no one is willing to fill the Chairperson seat at the end of the term, current Chairperson may be allowed to serve another term. After a Chairperson completes his/her term, he/she may still sit on the Board if there is a vacancy.

All user groups are required to have a website that is current, listing the meeting times and dates.

User Group attendance and questions must go to a form on the user group website or an email address used only for user group purposes. No personal email accounts are to be used.

Marketing Guidelines and Permitted Advertising

See “Marketing Guidelines and Permitted Advertising” in the User Group Program Agreement.

Legal Considerations

Incorporation

Depending on where your group meets and how much revenue your group generates, you may decide to incorporate. Contact your state tax department for details about legal restrictions and guidelines.

THESE GUIDELINES ARE NOT INTENDED TO BE TAX OR OTHER LEGAL ADVICE AND MAY NOT BE RELIED UPON AS A SUBSTITUTE FOR TAX OR LEGAL ADVICE.

Non-Profit Status

You may also choose to register your group as a non-profit organization, for example, a mutual benefit business association under IRC Code Sec. 501(c)6.

For additional information, contact the IRS at (800) 829-1040 and request IRS Publication 557, “Tax-Exempt Status for Your Organization.” You can also find more tax information on the IRS website.

Launching Your Group

Set an agenda, secure a meeting location and provide directions to that location via email invitation and on the website if launched prior to the first meeting.

Creating a Charter & Molding Your Mission Statement

To tighten your user group’s specific focus, work with group members or the Board of Directors/Steering Committee in the early stages of the group’s creation to create a mission statement and a charter. The mission statement should reflect the purpose of the group. The charter outlines the governance, goals and leadership and gives new members an idea of what to expect from your group and helps clarify group focus in the face of growing membership or conflicting purposes

Agenda

The first meeting will likely be more of a planning meeting for the members but should have a speaker to draw attendance. Agenda considerations:

- Creation of Mission Statement/Charter
- What activities will the group promote? (Education, networking, etc.)
- Who will make presentations? (User Group members, NetSuite, software/hardware vendors)
- What are the meeting requirements—frequency, duration, meeting locations (will it be a condition to meet six times a year?)
- Will there be a formal membership application? What types of members do you want?
- How will you maintain the membership data?
- How will the group be administered?
- Will dues be required?
- What are the communication requirements of the group?
- How will the group solicit membership?

How to Hold a Successful Meeting

1. Identify Your Audience

NetSuite local offices are willing to help by referring new users to user groups.

- The NetSuite website will have a link to a local user group site
- NetSuite may also assist by sending out email blasts

Local newspapers and radio programs will often publicize local meetings at no charge, especially for non-profit organizations.

2. Planning

When planning the agenda content, consider the following selling points to encourage attendance:

- Provide an opportunity to meet other users and share best practices, lessons learned
- Provide an opportunity to hear about new products offered by NetSuite or technology partners
- Hear leading technology experts
- Survey members to find out what they would like to hear—can be done prior to first meeting or at first meeting or alternatively Board of Directors/Steering Committee members can present a hot topic list for attendees to rank for future meetings

3. Obtaining Speakers & Setting Expectations

Speakers may be from NetSuite, a third-party vendor or your membership base.

- Ask well in advance of the meeting
- Outline the content of the presentation
- Use networks—if you want a specific speaker and a member in your group has a good relationship with that person, leverage that relationship
- Search locally
- Sell the meeting's importance—be specific about who will be attending the meeting and what benefits the speaker will get out of the appearance
- Invite a manager of a user group member. Maybe after the manager has talked to the group once, he or she will allow other employees of the member's company to attend more meetings and become more active
- Provide all the meeting details to speaker—date, time of day, place, the proposed agenda, time allotted, type of presentation, the subject, etc.
- Offer to help meet a speaker, make hotel reservations, arrange AV or anything else to make the speaker experience worthwhile

4. Details, Details, Details

Things that will add to your meeting:

- Send proposed agenda ahead of time
- When possible, meetings should be held on the same day of the week (for example, the second Tuesday of the month), at the same time, and at the same location each time. Another alternative is to rotate to different member sites with the member site providing the space and possibly the refreshments. As a courtesy, the member site should be given the opportunity to present. Existing user groups report that keeping a standard meeting schedule helps keep attendance up and increases it over time.
- Create a printed agenda for the meeting
- Begin the meeting on time and end on a positive note
- Use name tags
- Include paper and pens

- Provide refreshments
- Have someone take minutes—usually the Secretary’s responsibility but always nice to have a second set of minutes
- Introduce speakers and provide a brief biography
- Keep presentations to 30-45 minutes with time for Q & A
- Seat audience with their backs to the windows
- Test acoustics, AV and room temperature, lighting ahead of time
- Have a clock in plain view
- Provide a feedback sheet

Things that will detract from your meeting:

- Uncomfortable chairs
- Crowded or inappropriate seating
- Poor lighting
- Intruding noise or bad acoustics
- High temperature and poor ventilation
- Faulty visual aids

5. Promoting Your Meeting

- Email to members well in advance with a reminder—ask for RSVPs
- Calendar/notice on user group website
- NetSuite will also assist by sending out eblasts—maximum of four per year
- Local newspapers and radio programs will often publicize local meetings at no charge, especially for non-profit organizations
- Posting in user group newsletter or member newsletters
- Promote guest speaker
- May include “Ask NetSuite” session
- Address questions of where, when, how much does it cost?
- Maps & directions to meeting site

6. Day of Meeting

- Arrive one hour prior to meeting start to set up registration area and check room set-up, catering, audio visual, lighting, room temperature
- Provide a small table for registration
 - Check off expected attendees
 - Ask attendees to drop off business cards for a drawing—this is a way of providing additional names for membership recruiting and making sure you have up-to-date information on your members
- Ask a Board member to be available to greet attendees at registration Choose date and location for next meeting

7. Follow up

- Send out minutes of meeting and any attendee feedback
- Update website by adding minutes, presentations and provide answers to any follow up questions or actions items that were raised at the meeting
- Update the user group calendar on the website

Dues

A small number of user groups charge dues for meetings, usually to cover the costs of refreshments served. Membership fees are determined by each user group based on expenses the group will incur on room rental fees, snacks, advertising and the travel expenses of speakers.

Company Sponsorships

Some user groups generate money to pay for expenses by having vendors or NetSuite partners sponsor user group meetings. In return for such a sponsorship, the sponsoring company may receive mention at the beginning of the meeting or display its marketing materials. The user group's Board of Directors determines the amount charged for corporate sponsorship. **(See Appendix no. 3 – Sponsorship Opportunities).**

Retaining Members

Sometimes member retention is the most challenging task for user groups. To increase retention, hold meetings at the same time, day and location. Well-planned meetings also help raise numbers. To find out desired topics a survey can be done prior to the meeting, or on the website (if it already exists). It is also recommended that groups meet a **minimum of six times** per calendar year—meeting less frequently may lead to a drop-off in attendance.

Remember to vary your meeting format to keep your group alive and attendance up

APPENDICES

Appendix No. 1: User Group Application Form

NetSuite Regional User Group Application

NetSuite recognizes only one User Group for each metropolitan area so each group benefits from as much diversity as possible. Make sure to check the listings on the NetSuite website of user groups to see if one already exists in your area. If you don't see a group listed in your area and are interested in starting one, fill out the application below.

*All Required Fields

User Group Information

User Group City/ Area: _____

Requested Official Group Name: _____

Comments: _____

Group Manager Information

Email: _____

First Name: _____

Last Name: _____

Business Title: _____

Company Name: _____

Street Address: _____

City: _____

Country: _____

State: _____

Province: _____

Zip Code: _____

Phone: _____

Fax: _____

Description of Use for the Production Account

Industry: (drop down):

Tell us what products you are most familiar with: _____

Would you be willing to be part of the Board of Directors/Steering Committee:

YES NO

Comments: _____

Appendix No. 2: Sample of User Group Questionnaire

User Group Customer Draft Questionnaire

_____ is exploring the concept of creating a User Group for NetSuite customers and partners. This User Group will be a community of customers and partners linked together by the shared experience of using products produced by NetSuite. The User Group will focus on advocacy, knowledge, communication, education and networking activities and topics related to NetSuite products. The following questions have been developed to ascertain the level of interest and, more importantly, the types of benefits the user group should offer.

Are you familiar with the concept of a user group? (Y/N)

If no, would you be interesting in learning more about the user group concept? (Y/N)

If yes, would you be interested in joining? (Y/N)

Would you be interested in attending a user conference? (Y/N)

Following is a list of potential benefits, products, and services that could be offered by a user group to its members. Based on a scale of 1 – 5, with five being most valuable, please rate the following member benefits:

Networking and sharing ideas and with other NetSuite users

1 = Least Valuable 2 = 3 = 4 = Valuable 5 = Very Valuable

Learning about implementation and best practices

1 = Least Valuable 2 = 3 = 4 = Valuable 5 = Very Valuable

Learning about new products

1 = Least Valuable 2 = 3 = 4 = Valuable 5 = Very Valuable

Opportunities to influence NetSuite on product enhancements, usability, new features, support, pricing and quality.

1 = Least Valuable 2 = 3 = 4 = Valuable 5 = Very Valuable

User Group community website

1 = Least Valuable 2 = 3 = 4 = Valuable 5 = Very Valuable

Receiving discounts on SuiteWorld user and partner conference

1 = Least Valuable 2 = 3 = 4 = Valuable 5 = Very Valuable

Online membership database

1 = Least Valuable 2 = 3 = 4 = Valuable 5 = Very Valuable

Tips newsletter

1 = Least Valuable 2 = 3 = 4 = Valuable 5 = Very Valuable

Are there any benefits you would like to see added? (please list)

Would you be interested in a leadership role serving as a liaison between the User Group and NetSuite senior management? (Y/N)

Contact Information

Name: _____ Job Title: _____

Company: _____

Email: _____ Telephone: _____

Appendix No. 3: Sponsorship Opportunities

Fees to be determined by Board of Directors/Steering Committee.

- Vendor members may be invited to give a session on the agenda that can help underwrite the cost of lunch for the attendees
- Vendor members may subsidize the lunch and organize “bird of a feather” lunch tables according to a special interest (i.e., product, platform or industry). Small signs indicate the topic to be discussed at each table
- A vendor may be part of a presentation that allows attendees to view a vendor presentation of a product followed by a user presentation. This gives the attendees the opportunity to hear different perspectives on the product.
- A vendor may be given a display area where the coffee break is situated.