

CASE STUDY

Controller at Freedom Forever Saves 40hrs/month with CauzzyAI (SuiteApp) for NetSuite

CUSTOMER OVERVIEW

Company: Freedom Forever
Name, Role: Israel Mendez, Controller
ERP System: NetSuite

Freedom Forever, a publicly traded leader in residential solar energy, runs its finance/accounting and operations on NetSuite + CauzzyAI. With the introduction of AI agents, the finance/accounting team sought ways to leverage AI to improve efficiency, accelerate close cycles, and unlock deeper insights.

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“I built 12 agents myself in the first 3 months of using Cauzzy, and each saved me at least 2 hours/month.”

—Controller @ Freedom Forever
(Ticker: FRHC)



THE CHALLENGE: MOVING BEYOND AI EXPERIMENTATION

Israel Mendez, Controller at Freedom Forever, began exploring how to scale his team’s impact using AI. However, early AI attempts fell short:

- Month-end close consumed staff bandwidth, restricting their ability to even try AI
- AI chatbots were highly inaccurate, not repeatable and limited on how much data they could even access.

Most importantly, the team needed more than insights—they needed **execution** as well.

THE SOLUTION: CAUZZY AI FOR NETSUITE

Israel then turned to Cauzzy AI for NetSuite. After evaluating many other AI tools that were either just chatbots or didn’t focus on NetSuite, reducing their accuracy and value. Israel found Cauzzy to be a true enterprise-wide AI agent building platform led by a team of NetSuite, Accounting, and AI experts.



THE RESULTS: CONTROLLER LED INNOVATION

Within the first **3 months**, Israel personally built **12 AI agents**, transforming how his team operates.

These agents automated and enhanced:

- Journal entries (mid-month and month-end acceleration)
- Variance analysis (explaining “why” GL accounts changed period-over-period)
- Revenue forecasting workflows

Cross-system processes beyond NetSuite. Unlike legacy tools, Cauzzy proved highly effective at handling **complex customizations**, outperforming several existing applications in his tech stack—leading to plans to **replace those tools entirely**.



KEY REALIZATION:

“We couldn’t get much accuracy, value or repeatability from AI chatbots—we needed an enterprise AI platform with agents that could actually execute our work.”

THE IMPACT: IMMEDIATE ROI AND EXPONENTIAL PRODUCTIVITY GAINS

01

Massive Time Savings and Productivity Lift

AI agents fundamentally changed how work gets done:

- One agent reduced a 3-hour task to just 5 minutes
- Each new agent consistently saves at least 2 hours of recurring work
- Across 12 agents, this unlocked dozens of hours per week

This shift didn’t just improve efficiency—it freed Israel and his team to focus on higher-value, ad hoc business initiatives that were previously deprioritized.

02

Value Proven in Days

- Immediate productivity gains during the trial period
- Automation of key workflows starting Day 1
- Finance leadership saw rapid, tangible ROI within the first week

03

Rapid Adoption and Expansion

- Within 1 month, Freedom Forever expanded to 3× the initial user licenses
- AI adoption extended beyond finance into other departments
- Agents were deployed across multiple business systems—not just NetSuite

04

Organizational Transformation

- Finance became the driver of enterprise AI adoption
- Teams were trained to build and deploy their own agents
- Automation became embedded into daily workflows



“Don’t get in your own way trying to figure out the ‘right time’ or worrying about learning something new. Cauzzy makes it incredibly easy to get started—and the power of what you can build is unbelievable.”

— Israel Mendez,
Controller, Freedom Forever

KEY OUTCOMES

- Faster, more efficient month-end close
- Significant reduction in manual workload across finance
- Replacement of legacy tools with a more flexible AI platform
- Scalable, agent-driven automation across systems
- Finance-led AI transformation across the organization
- Rapid ROI within days, not months

Ready to Transform Your Finance Operations?

Request a free trial or demo at [Cauzzy.ai](https://cauzzy.ai)

Explore the AI Agent Marketplace:

<https://marketplace.cauzzy.ai/>