



OCEAN TOMO

Ocean Tomo, the Intellectual Capital Merchant Banc™ firm, provides companies with financial services related to intellectual property and intangible assets. Practice offerings include financial expert testimony, valuation, strategy consulting, investment advisory, innovation management consulting and transaction brokerage.

Our Opinion, Management, and Advisory Services are built upon more than two decades of experience valuing intellectual property in the most rigorous of venues – State, Federal and international courts.

DEMOGRAPHICS

- **INDUSTRY** | FINANCIAL SERVICES
- **HEADQUARTERS** | CHICAGO, IL
- **FOUNDED** | 2003
- **EMPLOYEES** | 85+
- **EXISTING ERP** | QUICKBOOKS

SALES TEAM

- **NETSUITE** | THOMAS GOLDBERG
- **CARAVEL** | MATT HAYTON
CAILA COHEN

NETSUITE SOLUTION

- **NETSUITE** | SUITE SUCCESS FINANCIALS 1ST CLD
- **MODULES** | GL, AP, AR, ADV FIN, OPENAIR
- **INTERFACES** | REVENUE PLATFORM, BANKING, CRM – PORTAL, PAYLOCITY

IMPLEMENTATION

- **TIMELINE** | 5 MONTHS
- **METHODOLOGY** | SUITE SUCCESS + OPTIMIZATION
- **APPROACH** | OCEAN TOMO WILL DEPLOY NETSUITE IN A MULTI-PHASED APPROACH DEPLOYING THE CORE SOLUTION IN 5 MONTHS.