

**CARAVEL**

BPM Technology Solutions

# Customer **PROFILE**

## Cascadia Capital

**CASCADIA**  
CAPITAL LLC

Cascadia Capital is an independent middle market investment bank founded in 1999, serving both private and public growth companies around the globe. They are client-focused, strategic partners that work with companies throughout their life cycle. They are industry specialists that simplify complex issues. Cascadia Capital believes in the potential of your business, and help you achieve your growth and liquidity goals.

### Demographics

**INDUSTRY** Financial Services**HEADQUARTERS** Seattle, WA**FOUNDED** 1999**EMPLOYEES** 200+**EXISTING ERP** QuickBooks**OTHER SYSTEMS** DealCloud, Bill.Com, Concur, Paycor, Power Bi, Key Bank

### NetSuite Solution

**NETSUITE** SuiteSuccess FinancialsFirst STD**MODULES** Record to Report, Procure to Pay, Order to Cash, SuiteAnalytics Connect, NSAW**INTERFACES** Key Bank, Paycor, Bill.Com, Concur, DealCloud, Power Bi

### Implementation

**TIMELINE** 5 months**METHODOLOGY** SuiteSuccess + Optimization**APPROACH** Cascadia Capital will deploy NetSuite in a single-phase with core functionality going live in month 5 and integrating to various 3rd party systems in phase 1.

### Sales Teams

**NETSUITE** Lindsay Miller, Jordan Edelson**CARAVEL** Scott Curry, Caila Cohen

#### CONTACT US

info@caravel-partners.com | 714-253-4455 | www.caravel-partners.com