



# CUSTOMER REFERENCE WEBINAR



**CARAVEL**  
BPM Technology Solutions



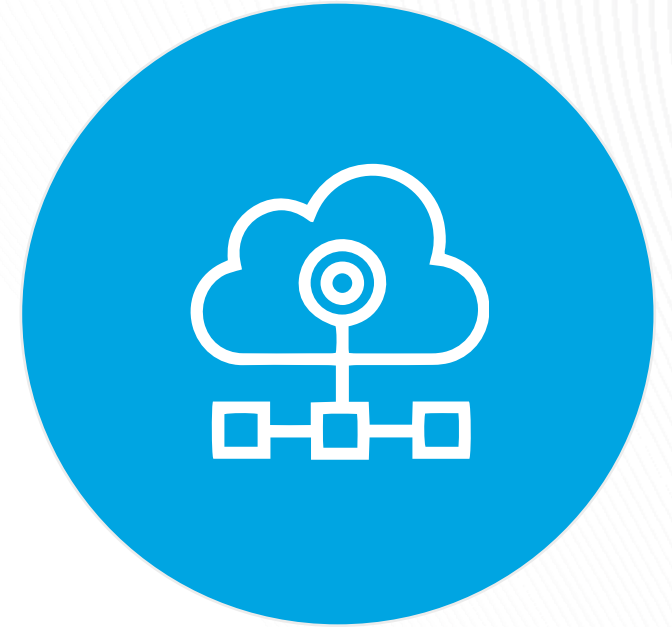
# TODAY'S CUSTOMER WEBINAR



PANEL DISCUSSION



GUEST CUSTOMER



ERP JOURNEY



# SPEAKER PANEL



**Venky Bettadapura, Dir. Supply Chain & Financial Systems**

Venky Bettadapura is a business-focused operations and technology solutions leader with digital transformation expertise enabling organizations to scale capabilities that drive growth and deliver greater customer experience.

In his current role as the Director of Supply Chain and Financial Systems at Leaf Home and a member of the Technology Leadership team, he and his team are accountable for streamlining, modernizing, and revolutionizing the supply chain, distribution and logistics capabilities of Leaf Home through various technology implementations around these domains.



**Caila Cohen, Partner**

Caila heads up Caravel's Solution Engineering team and works with clients in all stages of their system lifecycle - evaluation, implementation, support and optimization.

Caila is an Engineer by trade but spent many years implementing NetSuite for various types of organizations across verticals.

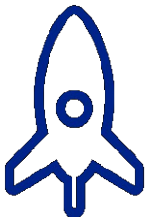




# ABOUT CARAVEL

750+

NET NEW NETSUITE  
IMPLEMENTATIONS



ORACLE  
NETSUITE  
PARTNER OF THE YEAR  
2020  
REGIONAL ALLIANCE OF  
THE YEAR - NORTH AMERICA

ORACLE  
NETSUITE  
PARTNER OF THE YEAR  
2020  
VERTICAL ALLIANCE OF  
THE YEAR - HI-TECH

ORACLE  
NETSUITE  
PARTNER OF THE YEAR  
2021  
VERTICAL ALLIANCE OF THE YEAR  
SERVICES

ORACLE  
NETSUITE  
PARTNER OF THE YEAR  
2022  
NORTH AMERICA PARTNER  
OF THE YEAR - SERVICES

ORACLE  
NETSUITE  
PARTNER OF THE YEAR  
2023  
NORTH AMERICA ALLIANCE  
PARTNER OF THE YEAR - SERVICES



ORACLE®  
NETSUITE

FINANCIAL MGMT

Avalara, BILLIFY, #toCloud, netgrain, BLACKLINE, kyniba

PROCURE TO PAY

bill.com, Zonos, ramp, airbase, Veeva, E

ORDER TO CASH

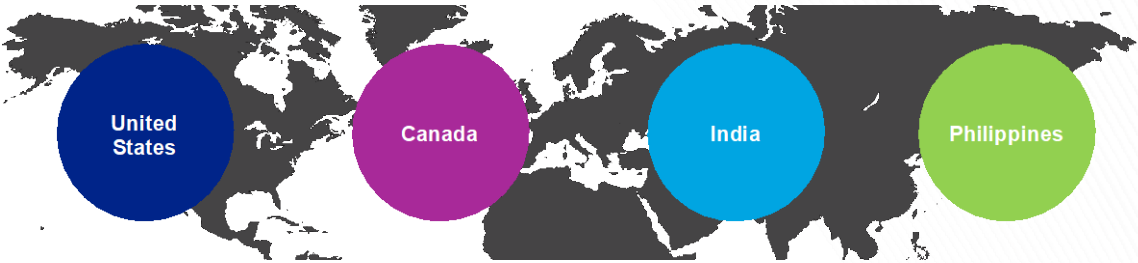
Zone, Versapay, Stripe, HubSpot, Paycom

celigo

boomi

workato

MuleSoft



CARAVEL  
BPM Technology Solutions



# ABOUT LEAF HOME



**INDUSTRY** | Direct to consumer home improvement & construction

## **BUSINESS**

**DESCRIPTION** | For all things “home” and from start to finish, Leaf Home delivers fast, seamless, transformative solutions directly to the consumer. With over 150 locations across North America, they’re proud to serve homeowners through their four brands: Leaf Filter, Leaf Water, Leaf Safety, and Leaf Enhancements.

**EMPLOYEES** | 1800+

**HEADQUARTERS** | Hudson, OH



# ERP JOURNEY

## EXISTING SYSTEMS

- Legacy CRM
- Legacy Supply Chain
- NetSuite Financials
- UKG, Concur

## BUSINESS PAINS

- Supply chain and financials on different systems and not integrated in real-time
- Supply chain systems inventory recording not in real-time; allows inventory to go negative; no inventory controls
- Current supply chain systems not integrated to TMS, 3PL, and other peripheral systems
- Manual intercompany transactions

## ERP GOALS

- Improve business controls
- Enhance inventory management
- Enhance integration across supply chain
- Replace multiple legacy systems in supply chain and distribution area
- Need for real-time information on suppliers, inventory and job profitability across all brands
- Automate interco/brand transactions



# SELECTION **PROCESS**

## VENDORS CONSIDERED

- NetSuite
- Microsoft Dynamics 365
- Sage X3
- Infor

## PROCESS

- Functional fit – how do the capabilities fit with what we are looking for?
- Technical fit – are they cloud based? Can it be tailored to our needs and connected to other systems?
- Vendor rating – how does the future of the company seem?
- Do we have the resources to support the journey?

## DECISION CRITERIA

- Change management – how difficult it would be to bring on the new system and train workforce
- Technical resources availability and the effort to integrate into our landscape with other systems such as CRM, HR, Expense, 3PLs and TMS
- Cost



# “WHO” & “WHY”

## WHO & WHY NETSUITE

NetSuite was being used as a financial system so implementing supply chain, inventory, and WMS modules was an easier lift vs a new entrant.

## WHO & WHY CARAVEL

Lots of bench strength, knowledgeable, and accountable consultants.

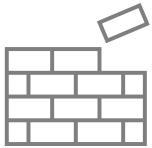




# ERP **BENEFITS**

## FOUNDATION

Platform for growth



## LEADING PRACTICES

Adopt leading practices & controls



## VISIBILITY

Timely access to data & improved reporting



# IT'S A **WRAP!**



## Q&A

### UPCOMING WEBINARS

- 5/2 How a Large Organization Migrated to NetSuite with Curalta
- 5/9 Delivering on Large NetSuite Implementations with United Road
- 5/16 Consumer Business Manufacturing with Jaxson Engineering

### Caravel Contacts



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# Thanks!

