



CUSTOMER REFERENCE WEBINAR



CARAVEL
BPM Technology Solutions



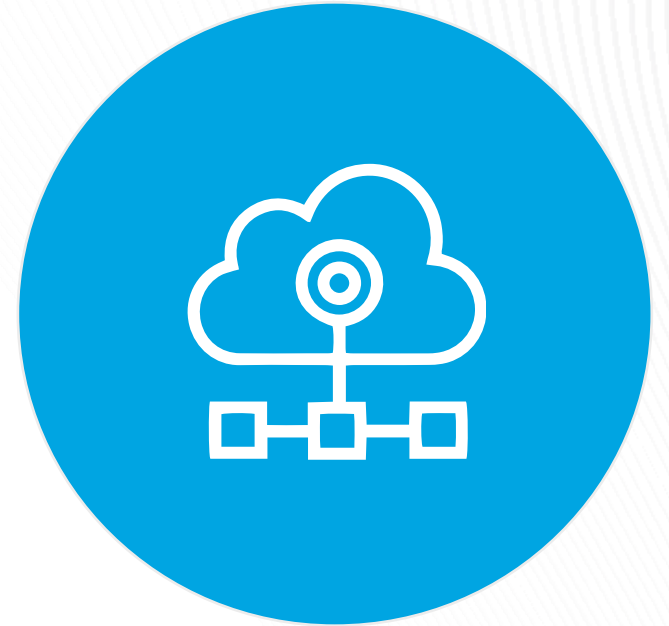
TODAY'S CUSTOMER WEBINAR



PANEL DISCUSSION



GUEST CUSTOMER



ERP JOURNEY



SPEAKER PANEL

Calvin Lyons, Dir Finance, Jaxson



Calvin Lyons, CMA, is the Director of Finance at Jaxson Engineering. Calvin has worked in government accounting and finance for nearly 10 years. He has been with Jaxson Engineering since 2018 working up from bookkeeper to director. He presently oversees the finance software stack and accounting processes.

Matt Hayton, Partner



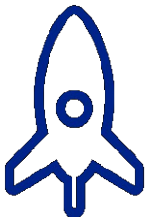
Matt has spent over 10 years working with clients to identify, select and implement the right technology solutions to scale their business in both the front and back office. During that time, Matt worked with numerous executives across multiple industries, as they have defined their requirements, streamlined their business processes and then looked to map technology solutions to accomplish those objectives. Matt won multiple national awards for his business development and customer success accomplishments.



ABOUT CARAVEL

750+

NET NEW NETSUITE
IMPLEMENTATIONS



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

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

PARTNER OF THE YEAR
2021
VERTICAL ALLIANCE OF THE YEAR - SERVICES

PARTNER OF THE YEAR
2022
NORTH AMERICA ALLIANCE PARTNER OF THE YEAR - SERVICES

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



ORACLE[®]
NETSUITE

FINANCIAL MGMT

Avalara, BILLIFY, #toCloud, netgrain, BLUCLURE, kyniba

PROCURE TO PAY

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

ORDER TO CASH

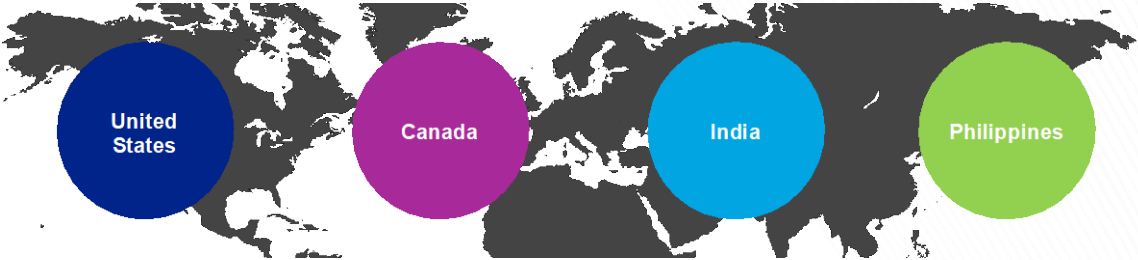
Zone, Versapay, Stripe, HubSpot, Paycom

celigo

boomi

workato

MuleSoft



CARAVEL
BPM Technology Solutions



ABOUT JAXON



INDUSTRY | DoD Engineering Services (HEMP Protection)

BUSINESS

DESCRIPTION | Custom engineering cradle to grave; design, build and maintain HEMP hardness solutions for DoD and Commercial clients.

EMPLOYEES | 123

HEADQUARTERS | Colorado Springs, CO



ERP JOURNEY

EXISTING SYSTEMS

- NetSuite
- DataBasics
- OpenAir
- Briq
- Paylocity
- Autodesk Vault

BUSINESS PAINS

- Pace of growth, solutions can be out of pace with the need
- Cash constraints relative to growth
- Change management

ERP GOALS

- Full utilization with the system
- Integration and automation
- System of record vs. a tool



SELECTION **PROCESS**

VENDORS CONSIDERED

- Oracle NetSuite
- Sage Intacct
- Procore
- MRP Solutions
(Fishbowl, Capterra, Acumatica)

PROCESS

- Our process started with searching for an MRP solution
- Evolved into realizing we needed an ERP solution first
- Began looking for good systems to leave QuickBooks for

DECISION CRITERIA

- Functions offered
- Cost analysis
- Stakeholder values



“WHO” & “WHY”

WHO & WHY NETSUITE

- Cost felt relatively similar
- We like the idea of less platforms (reducing the stack), and NetSuite attempts to be a single platform solution

WHO & WHY CARAVEL

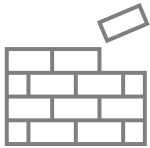
- Recommended by our sales rep
- Caravel is awesome; Brent and Kerry have influenced the future of our business forever



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

5/23

Education Technology with Transfr

Caravel Contacts



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Delivery & Operations
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Meagan Hove, Director, Client Engagement
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Thanks!

