



# CUSTOMER REFERENCE WEBINAR



**CARAVEL**  
BPM Technology Solutions



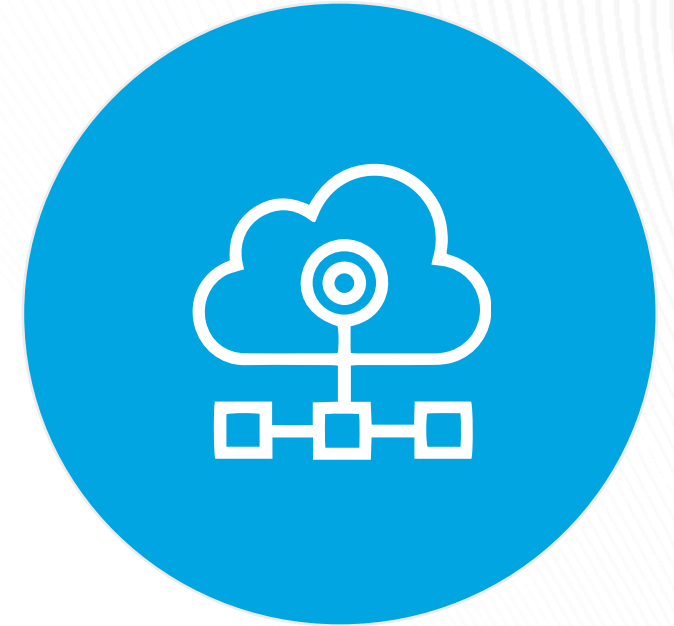
# TODAY'S **CUSTOMER WEBINAR**



PANEL DISCUSSION

The logo for transfr, featuring a blue double-headed arrow icon followed by the word "transfr" in a bold, black, sans-serif font, all contained within a purple circle.

GUEST CUSTOMER



ERP JOURNEY



# SPEAKER PANEL



Katy Shipp, VP Corporate Finance & Controller

Katy has 12 years of experience working for high-growth technology companies in Fintech, Digital Marketing, and most recently with Transfr, in EdTech. She has led both finance and accounting teams with a focus on streamlining processes, improving reporting and providing deeper analytics, and building lean, scalable teams.



Kerry Barber, MBA, PMP, Senior Manager, Practice Lead

Kerry has spent over 15 years in the software industry, working with clients to implement scalable solutions and drive revenue. Kerry serves multiple roles in the company both on the functional side as a consultant and as a project manager overseeing projects. Kerry's clients are highly referenceable.

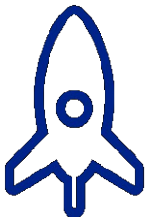




# ABOUT CARAVEL

750+

NET NEW NETSUITE  
IMPLEMENTATIONS



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

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

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

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

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



celigo boomi workato MuleSoft

FINANCIAL MGMT

Avalara Bill.com Zoho One Ramp A NetScout Kyniba

PROCURE TO PAY

bill.com Zoho One Ramp A NetScout Kyniba

ORDER TO CASH

Versapay Stripe HubSpot



# ABOUT TRANSFR



**INDUSTRY** | High-Tech

## **BUSINESS**

**DESCRIPTION** | Transfr is creating classroom-to-career pathways by providing virtual reality training simulations for in-demand professions, such as manufacturing, aviation, and construction

**EMPLOYEES** | 200+

**HEADQUARTERS** | New York, NY



# ERP JOURNEY

## EXISTING SYSTEMS

- Quickbooks
- Excel

## BUSINESS PAINS

- Required a tool that was customizable enough to scale as the business grows but also could be implemented quickly
- Did not have a process for generating financial statements on a regular schedule
- Lack of internal controls and documentation

## ERP GOALS

- Integrations across multiple tools including Ramp, Salesforce, and Avalara
- Automation of customer invoicing, revenue recognition, prepaid amortization, inventory tracking, and fulfillment
- Strong internal controls and auditability



# SELECTION **PROCESS**

## VENDORS CONSIDERED

- Caravel
- BSP
- Riveron

## PROCESS

- Interviewed three vendors
- Multiple conversations with the Caravel team to gain comfort around areas of focus – timeline, communication, etc.

## DECISION CRITERIA

- Pricing & value
- Timeline
- Flexibility & communication
- Recommendations/references – Caravel came highly recommended in tech space



# “WHO” & “WHY”

## WHO & WHY NETSUITE

- NetSuite had been used by many team members in the past and is a tool that can be learned rather quickly
- NetSuite allows for a high level of customization with detailed, segmented financial reporting, deeper revenue analysis by customer segment, and more
- NetSuite allows for a higher degree of automation through memorized transactions and the advanced revenue module
- Many other ancillary softwares have pre-built integrations with NetSuite, allowing for faster and simpler implementations
- Transfr needed a solution for hardware and inventory tracking that could seamlessly integrate with our accounting ERP

## WHO & WHY CARAVEL

- Timeline was critical; we were kicking off the implementation in September with a phase 1 go-live of Jan 1; the goal was to ensure a smooth conversion at the beginning of the year. Caravel was able to accommodate despite the tight turnaround and helped guide us through a phased approach
- Communication was key - we wanted the internal team to be hands-on and learning throughout the implementation with the goal of becoming self-sufficient in NetSuite. Required a consulting team that understood our business but could also clearly communicate and train
- Caravel understood/had experience implementing NetSuite as well as experience working with the other tools we integrated: Salesforce, NetGain, Avalara, etc. Caravel also had strong understanding of ARM, WMS or Warehouse Management, and NetGain

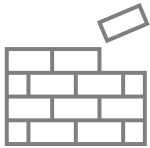




# ERP **BENEFITS**

## **FOUNDATION**

Platform for growth



## **LEADING PRACTICES**

Adopt leading practices & controls



## **VISIBILITY**

Timely access to data & improved reporting



# IT'S A **WRAP!**



**Q&A**

## **Caravel Contacts**



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# Thanks!

