

# CUSTOMER REFERENCE WEBINAR



**CARAVEL**  
BPM Technology Solutions



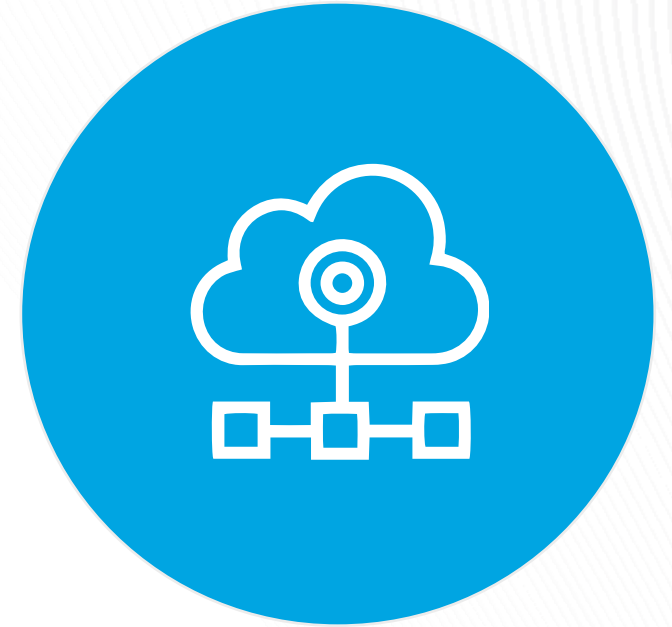
# TODAY'S CUSTOMER WEBINAR



PANEL DISCUSSION



GUEST CUSTOMER



ERP JOURNEY



# SPEAKER PANEL



Kevin Kirkpatrick, Sr. Director of Operations Technology

At United Road, Kevin's areas of responsibility include all its business apps including NetSuite, Salesforce, and TMS, among others. Last year, United Road successfully launched NetSuite and NSPB as part of decommissioning from SAGE MAS 500 and other standalone accounting applications.



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.

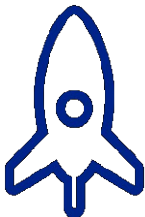




# ABOUT CARAVEL

750+

NET NEW NETSUITE  
IMPLEMENTATIONS



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<sup>®</sup>  
NETSUITE

FINANCIAL MGMT

Avalara, BILL, netDIVE, #toCloud, netgrain, BLUCLURE, kyniba

PROCURE TO PAY

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

ORDER TO CASH

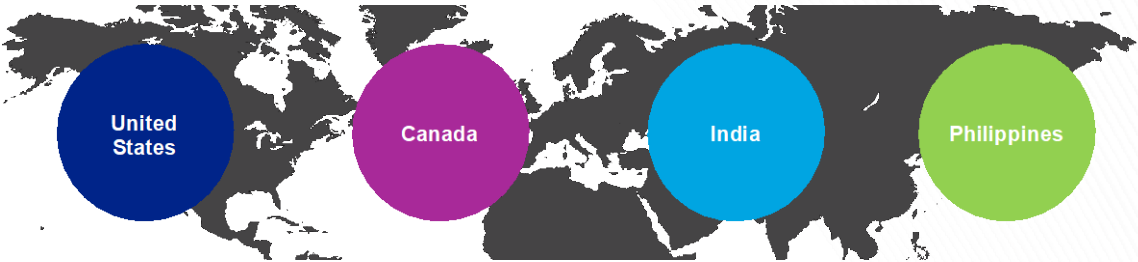
Zone, Versapay, Stripe, HubSpot, Paycom

celigo

boomi

workato

MuleSoft



CARAVEL  
BPM Technology Solutions

# ABOUT UNITED ROAD



**INDUSTRY** | Logistics & Transportation

## **BUSINESS**

**DESCRIPTION** | United Road is the premier automotive transport expert, shipping more than 4 million vehicles annually for 10,000+ customers throughout North America.

**EMPLOYEES** | 700+

**HEADQUARTERS** | Plymouth, MI



# ERP JOURNEY

## EXISTING SYSTEMS

- SAGE MAS 500
- Lease Query
- FAS
- Salesforce
- Custom transportation management system(OVISS)
- Trimble TMT Maintenance

## BUSINESS PAINS

- Legacy systems
- Manual workflows
- Departmental silos

## ERP GOALS

- Simplify accounting processes and workflows
- Reduce IT costs long-term
- Integrated systems
- 360-degree view of a customer



# SELECTION **PROCESS**

## VENDORS CONSIDERED

- SAP/S4 HANA
- Microsoft Dynamics 365
- NetSuite
- Acumatica
- Infor

## PROCESS

- Vendor score comparison
- Cost
- Complexity
- Functionality

## DECISION CRITERIA

- Core finance/accounting functions
  - Quote to Cash
  - GL
  - AP/AR
  - Finance reporting
- Scalability
- Technical integrations
- Post go-live support
- Cost



# “WHO” & “WHY”

## WHO & WHY NETSUITE

- Organizational synergies
- Ease of use
- Technology first
  - Integration
  - Suite Apps
- NSPB
- Future enhancements

## WHO & WHY CARAVEL

- NetSuite expertise
- Culture and fit
- Post go-live support

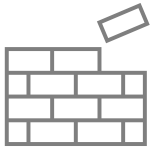




# ERP **BENEFITS**

## 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

- 5/16 Consumer Business Manufacturing with Jaxson Engineering
- 5/23 Transfr + Caravel: Education Technology Succeeding in NetSuite

## Caravel Contacts



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# Thanks!

