

**CARAVEL**

BPM Technology Solutions

# Customer **PROFILE**

## Encina Management Services

Encina Capital Partners, LLC, through its affiliates, has provided specialized lending and leasing solutions to middle-market companies in the U.S. and Canada. Since 2016, Encina has provided over \$3 billion in aggregate commitments to more than 150 customers across a wide variety of industries. Encina has approximately 50 employees located across several locations in the U.S. In 2021, they completed the successful sale of two of its platforms, validating their ability to launch, scale and monetize commercial finance companies. Encina's remaining focus is now aimed at growing Encina Private Credit and Encina Lender Finance.

**ENCINA**  
CAPITAL PARTNERS

### Demographics

**INDUSTRY** Financial Services**HEADQUARTERS** Norwalk, CT**FOUNDED** 2018**EMPLOYEES** 50**EXISTING ERP** QuickBooks**OTHER SYSTEMS** Salesforce, Certify, Excel, WSO (Wall Street Office)

### NetSuite Solution

**NETSUITE** Financials**MODULES** Financials, Record to Report, Procure to Pay, Order to Cash**INTERFACES** Banking

### Sales Teams

**NETSUITE** Ken Moore**CARAVEL** Frank Herr, Jake Waters

### Implementation

**TIMELINE** 3 months**METHODOLOGY** SuiteSuccess + Emerging**APPROACH** Encina Management Services, LLC will deploy NetSuite in a single phase with core functionality going live in month three.

### CONTACT US

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