

CUSTOMER REFERENCE WEBINAR



CARAVEL
BPM Technology Solutions



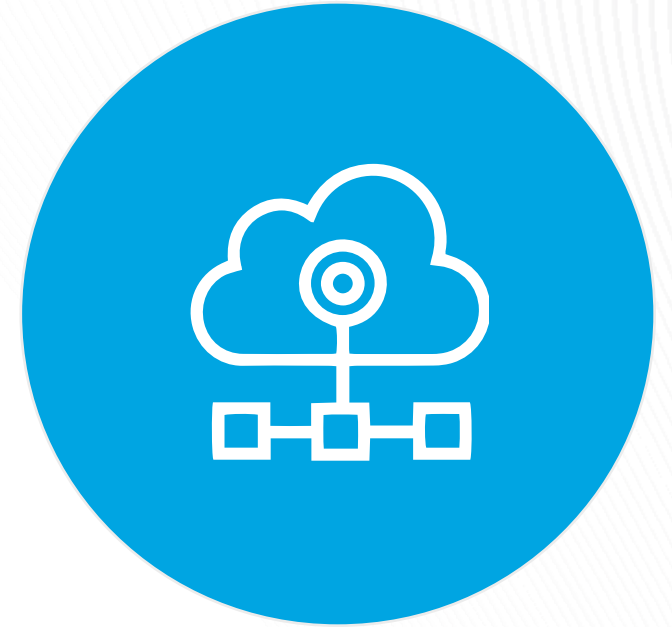
TODAY'S CUSTOMER WEBINAR



PANEL DISCUSSION



GUEST CUSTOMER



ERP JOURNEY



SPEAKER PANEL



Marie-Laure Leglise, CFO, P.W. Gillibrand Co., Inc.

Marie-Laure Leglise has been CFO of P.W. Gillibrand Co., Inc. – a specialty aggregate products company - for the past ten years. For the last two years she was the Executive Sponsor of the NetSuite implementation for the company and its eight subsidiaries.

Over the span of her forty-year career, she worked in finance and accounting for a number of companies of miscellaneous sizes, from start-up to fortune 500s in industries spanning from Consumer Goods to Software As A Service. She was involved in many software implementations including ERPs, tax, production, and accounting software.



Scott Curry, Managing Partner, Caravel

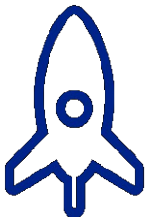
Scott works with clients on business process strategy, software selection, implementation and managed services. As a former CPA and Financial Operations Principal, Scott has a broad background including finance, distribution, manufacturing, eCommerce, CRM and HCM. Scott works with various software, high-tech manufacturing, semiconductor, renewable energy, retail, multi-channel distribution, services, consumer products, life sciences, gaming and social networking companies. Scott has held various positions in his career and worked directly for some of the world's largest software companies such as Oracle and NetSuite.



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



ORACLE®
NETSUITE

FINANCIAL MGMT

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

PROCURE TO PAY

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

ORDER TO CASH

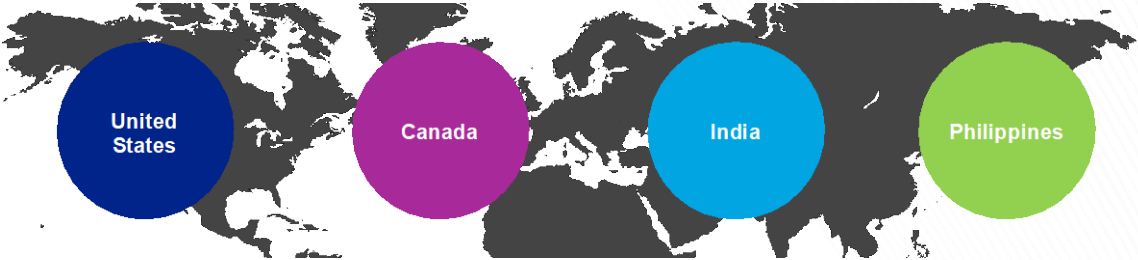
Zone, Versapay, Stripe, HubSpot, Paycom

celigo

boomi

workato

MuleSoft



CARAVEL
BPM Technology Solutions

ABOUT P.W. Gillibrand



INDUSTRY | Sand mining and processing

BUSINESS

DESCRIPTION | PW Gillibrand operates multiple sand quarries and sand processing facilities in the western United States. Sand (and gravel) is extracted from the earth, then sorted, washed and dried as needed.

EMPLOYEES | 200

HEADQUARTERS | Simi Valley, CA



ERP JOURNEY

EXISTING SYSTEMS

Microsoft AX Dynamics

BUSINESS PAINS

- AX Dynamics was getting to the end of its life and was no longer supported by Microsoft. We had support from our partner, but the software was no longer being updated and we were running into technical issues more and more frequently.
- Lack of a user-friendly business reporting and analysis tool.

ERP GOALS

- Replace AX Dynamics with a system that could support all our business activities
- Get a strong reporting tool; dashboards, KPIs, etc.



SELECTION **PROCESS**

VENDORS CONSIDERED

- Microsoft Dynamics 365
- Oracle
- NetSuite
- SAP
- Epicor

PROCESS

- IT looked at vendors and narrowed down the list of contenders to three: Microsoft, NetSuite and Oracle
- We already knew the Microsoft product – 365 was an upgrade from the ERP we had used for 10 years. We had a good partner who could support us with either Microsoft or Oracle.
- We asked NetSuite for a demo. First, they gave us the names of a couple of partners whom we interviewed. Once we decided on a potential Partner for NetSuite, an extensive demo was set-up

DECISION CRITERIA

- Ability of the new ERP to replicate some of the critical functionalities of the old ERP such as loading and shipping
- Overall functionalities
- Reporting capabilities
- Partner
- Price



“WHO” & “WHY”

WHO & WHY NETSUITE

- Functionalities and reporting capabilities
- NetSuite and Caravel teams
- There had been many frustrations with the inflexibility of Microsoft Dynamics and NetSuite looked much more nimble
- The NetSuite implementation was going to cost significantly less than Microsoft or Oracle

WHO & WHY CARAVEL

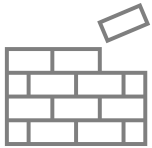
- Our NetSuite contact gave us the names of a couple of potential partners
- When we reached out to Caravel, they were very responsive. They answered all questions. When they came for the demo, we had a good relationship with their team.



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

- | | |
|-------|-------------------------------------|
| 10/16 | Goddard Customer Reference Webinar |
| 10/30 | InSource Customer Reference Webinar |

Caravel Contacts



Tai Valenzuela, Managing Director,
Delivery & Operations
tvalenzuela@bpm.com

Meagan Hove, Director, Client Engagement
mhove@bpm.com



Thanks!

