

CUSTOMER REFERENCE WEBINAR



CARAVEL
BPM Technology Solutions



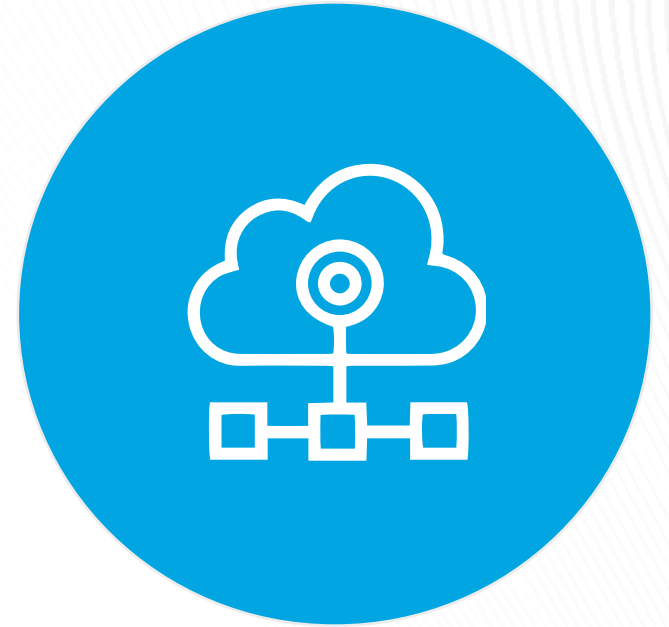
TODAY'S CUSTOMER WEBINAR



PANEL DISCUSSION



GUEST CUSTOMER



ERP JOURNEY



SPEAKER PANEL



Tom Barczak, Chief Information Officer, InSource

Tom Barczak is CIO, VP & Co-Founder of InSource Solutions, an Employee-Owned Manufacturing Operations IT Company. His career at InSource has spanned nearly 30 years in various Sales, Marketing & IT roles always striving to simplify complex business operations through the application of technology, process, people skills & disciplined execution.



Dhruv Bhatt, Sr. Director, NetSuite Delivery

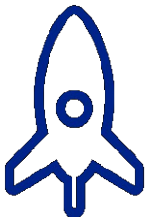
Dhruv leverages his strong consulting background and deep understanding of accounting principles in his role as Senior Director of the Delivery Practice at Caravel. Through his progression in various consulting roles, he developed a comprehensive understanding of ERP solutions, accounting principles, and client engagement. At Caravel, Dhruv leads the delivery practice, where he builds delivery strategies, enhances implementation methodologies, develops assets, and drives continuous improvement. He has successfully led over 200+ implementation projects across diverse industries, including Crypto, Financial Services, Retail, Software, and Services.



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 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, Zonos, ramp, airbase, Veeva, E

ORDER TO CASH

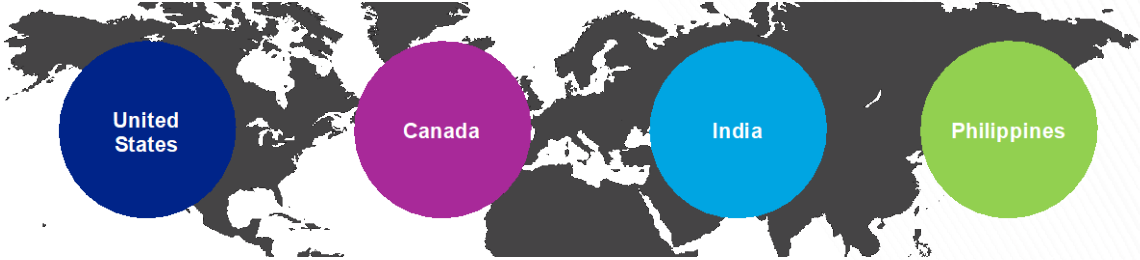
Zone, Versapay, Stripe, HubSpot, Paycom

celigo

boomi

workato

MuleSoft



CARAVEL
BPM Technology Solutions

ABOUT InSource Solutions



INDUSTRY | Manufacturing Software VAR and Services/Consulting

BUSINESS

DESCRIPTION | InSource Solutions simplifies success for industrial environments. We reinvent manufacturing with digitization solutions and services that align industrial operations with business outcomes. We provide solutions and services that help our clients compete globally, and we do it because we are passionate about manufacturing.

EMPLOYEES | 85

HEADQUARTERS | Richmond, VA



JOURNEY

EXISTING ISSUES

- Address increasing complexity of revenue management, because of business evolution
 - Services
 - Consulting
 - Managed Services
- End of life of previous solution

BUSINESS PAINS

- Increased labor for subscription management (new and renewals)
 - Single-year and multi-year subscriptions
- Lack of subscription ARR and MRR financial reporting
- Increasing amount of labor for revenue management
- ASC606 compliance

FUTURE GOALS

- Opportunity quote queue management
- Project management (augmenting PM in other systems)
 - Currently using SuiteProjects
- Evolution of case management to address managed services business use cases



“WHO” & “WHY”

WHO & WHY NETSUITE

- Suiteness
- Flexibility
- Extensibility
- Elasticity

WHO & WHY CARAVEL

- NetSuite referred us to Caravel
- The partnership has been:
 - Efficient
 - Fair
 - Productive
 - Rewarding



BENEFITS

MODERNIZATION
Platform for growth



LEADING PRACTICES
Adopt leading practices & controls



VISIBILITY
Timely access to data & improved reporting



IT'S A **WRAP!**



Q&A

UPCOMING WEBINARS

11/20

Anaqua Customer Reference Webinar

Caravel Contacts



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Thanks!

