



CUSTOMER REFERENCE WEBINAR



CARAVEL
BPM Technology Solutions



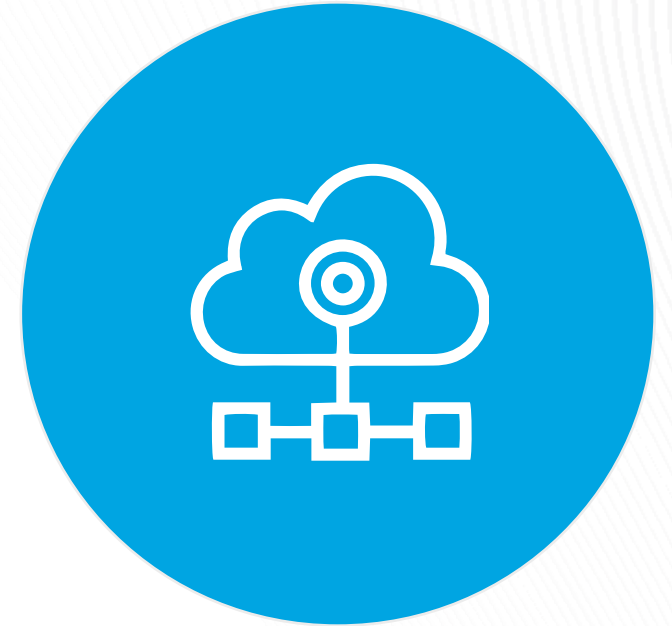
TODAY'S **CUSTOMER WEBINAR**



PANEL DISCUSSION



GUEST CUSTOMER



ERP JOURNEY



SPEAKER PANEL



Ryan Kovacs is the Associate Director of Revenue Operations at Anaqua. With 13 years of experience in corporate accounting and finance throughout the greater Boston area, he specializes in general ledger accounting, revenue management, budgeting and forecasting, intercompany transactions, and corporate consolidations. He has led Anaqua's revenue operations group for the past three years.



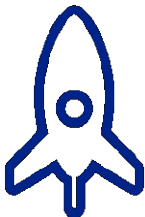
Donovan Lemaster is a Senior Consulting Director at Caravel and has been with the company for 4 years. Donovan functions as a Solution Architect and Executive Sponsor on large scale and strategic projects. Donovan has a keen focus on advanced Order to Cash and Record to Report modules including Advanced Revenue Management, SuiteBilling, and MultiBook. Additionally, Donovan focuses on accounting controls and compliance utilizing out of the box NetSuite functionality. Before working at Caravel, Donovan was a consultant at NetSuite working primarily on Software and Services projects. His overall background is in Accounting.



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[®]
NETSUITE

FINANCIAL MGMT

Avalara, BILLIFY, #toCloud, netgrain, BLUCLURE, kyniba

PROCURE TO PAY

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

ORDER TO CASH

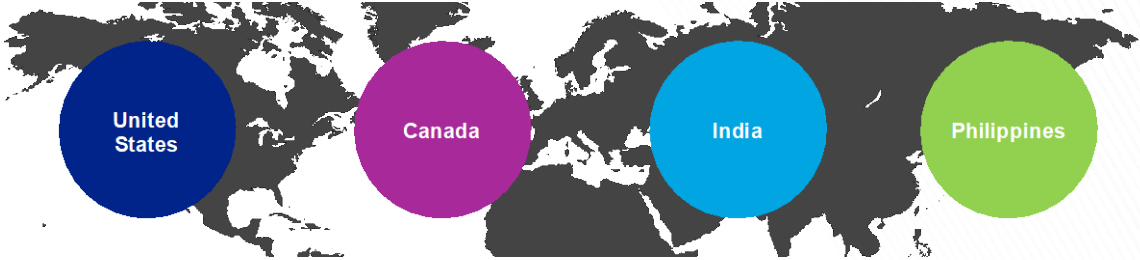
Zone, Versapay, stripe, HubSpot, Paycom

celigo

boomi

workato

MuleSoft



CARAVEL
BPM Technology Solutions

ABOUT XXXXX



INDUSTRY | SaaS

BUSINESS

DESCRIPTION | Anaqua develops and sells IP management software.

EMPLOYEES | 900

HEADQUARTERS | Boston, MA



CARAVEL
BPM Technology Solutions

ERP JOURNEY

EXISTING SYSTEMS

- NetSuite
- Salesforce

BUSINESS PAINS

- Revenue modeling & reporting
- API connections with other systems
- Manual processes for month-end close

ERP GOALS

- Install Advanced Revenue Management (ARM) module
- Create new fair value rule system for complex revenue arrangements
- Streamline month-end process



SELECTION **PROCESS**

VENDORS CONSIDERED

- NetSuite Consultation Service
- Caravel

PROCESS

Anaqua conducted search and considered in-house option with NetSuite developers

DECISION CRITERIA

- Evaluate timeline and action plan
- Consider cost and competency of consultants
- Consider support criteria post go-live in the event of any system bugs or errors



“WHO” & “WHY”

WHO & WHY NETSUITE

- We had NetSuite before we contracted with Caravel, but in general, NetSuite is an appropriate software for a mid-size company, and a common choice for companies in the SaaS industry.

WHO & WHY CARAVEL

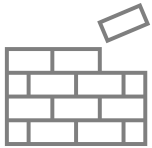
- Caravel seemed to possess the expertise needed to implement the ARM module for Anaqua
- Their consultants appeared confident, and the project manager drew a good road map, starting from the planning phase until go-live
- Caravel had a good track record considering their previous work with implementations and NetSuite, and their fees were very reasonable



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

2/26

Customer Reference Webinar: VetEvolve

Caravel Contacts



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Thanks!

