

**CARAVEL**

BPM Technology Solutions

CUSTOMER PROFILE

Industry: Non-Profit

The Simons Foundation



The Simons Foundation's mission is to advance the frontiers of research in mathematics and the basic sciences. Since its founding in 1994 by Jim and Marilyn Simons, the foundation has been a champion of basic science through grant funding, support for research and public engagement. The Simons Foundation makes grants in four areas: Mathematics & Physical Sciences, Life Sciences, Autism & Neuroscience, and Science, Society & Culture.

HQ: New York, NY **Founded:** 1994 **Employees:** 500

Existing ERP: Great Plains

Other systems: Concur, Planful, Tableau, ADP, SmartSimple, Cvent

Customer Challenges: Consolidation/Elimination, Grant Management

Deal Competitors: Protiviti

Why we Won: Caravel won due to being a NetSuite consulting firm first, before an accounting firm.

Caravel teams:

Caila Cohen, Frank Herr,
Jake Waters

NetSuite Implementation

NetSuite sales team:

Shannon Cotter
Elizabeth Willard

NetSuite: Social Impact Standard

Methodology: SuiteSuccess + Optimization

Modules: Financials, Record to Report, Procure to Pay, Project to Cash

Interfaces: Banking, Concur, ADP, Cvent, SmartSimple, Planful, Tableau

Approach: The Simons Foundation will deploy NetSuite in a single phase with core functionality going live in month five.

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