

**CARAVEL**

BPM Technology Solutions

CUSTOMER PROFILE

Industry: Financial Services

Montana Community Development Corporation (MoFi)



MoFi is a mission-driven lender that provides financing and consulting services to businesses, entrepreneurs, and real estate developers who are unable to access traditional financing. The people they help build businesses, revitalize neighborhoods, and strengthen communities across the Rocky Mountain West. Their work spans 35 years, six states, and thousands of businesses.

HQ: Missoula, MT **Founded:** 1989 **Employees:** 88

Existing ERP: MIP

Other systems: Salesforce, Concur, Excel, ADP, First Security Bank of Missoula, First Interstate Bank, Nortridge

Customer Challenges: FP&A was a major challenge for the MoFi team. Multi-entity management, reporting, and insight into information incoming from outside systems were also pain points.

Deal Competitors: NSPS

Why we Won: Due to our expertise and capability to deliver a tailored NSPB solution.

Caravel teams:

Kelly Gonyea

NetSuite Implementation

NetSuite sales team:
Hannah Lerner

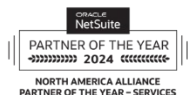
NetSuite: Non-Profit

Methodology: SuiteSuccess + Optimization

Modules: GL, AP, AR, Grant Management

Interfaces: Banking, ADP, Salesforce, Nortridge, AvidXchange

Approach: MoFi will deploy NetSuite in a single phase with core functionality and NSPB going live in month four.



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