

**CARAVEL**

BPM Technology Solutions

**CUSTOMER PROFILE**

# Industry: Financial Services

## Farallon Capital Management



Farallon Capital Management, L.L.C.® is a global institutional asset management firm founded in 1986. They are headquartered in San Francisco and operate globally with offices in London, Singapore, Hong Kong, Tokyo and São Paulo. They invest across asset classes, seeking to achieve superior risk-adjusted returns through a process of bottom-up fundamental analysis that emphasizes capital preservation.

**HQ:** San Francisco, CA **Founded:** 1986 **Employees:** <500

**Existing ERP:** SAP Business One

**Other systems:** Concur, Excel, UKG, Banks, Geneva, Deal Insight

**Customer Challenges:** Reporting, Integrations, Revenue Management

**Deal Competitors:** Manual processes, disparate systems, and old technology that was difficult to customize.

**Why we Won:** Confidence in white glove implementation approach and experience in financial services industry, as well as the NetSuite team doing a great job of selling the client on NetSuite over all other vendors.

### Caravel teams:

Erica Kyriakides, Jake Waters

## NetSuite Implementation

**NetSuite sales team:**  
Kodi Weil, David Silver

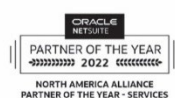
**NetSuite:** Financials First Premium

**Methodology:** SuiteSuccess + Optimization

**Modules:** Record to Report, Oneworld, Procure to Pay, NSPB, NSAW

**Interfaces:** Banking, UKG, SquareWorks, Concur, Deal Insight, Sage FAS, Calero

**Approach:** Farallon will deploy NetSuite in a single phase with core functionality going live in 9 months and integrating to various 3rd party systems in phase one.



### CONTACT US:

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