



# NSPB / NSAW – Services Industry

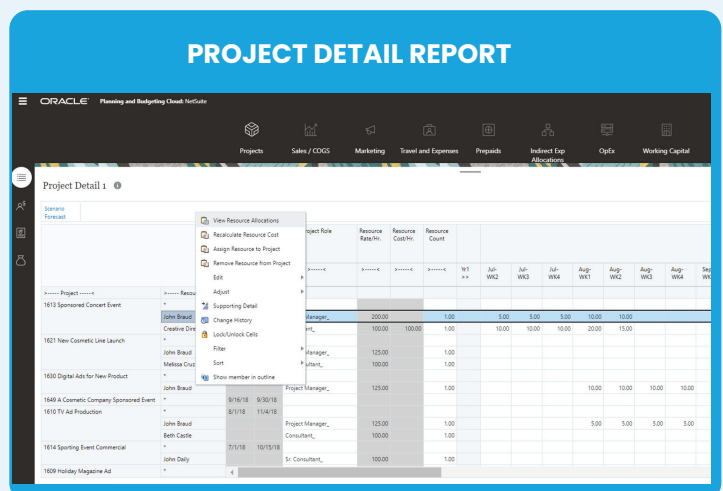
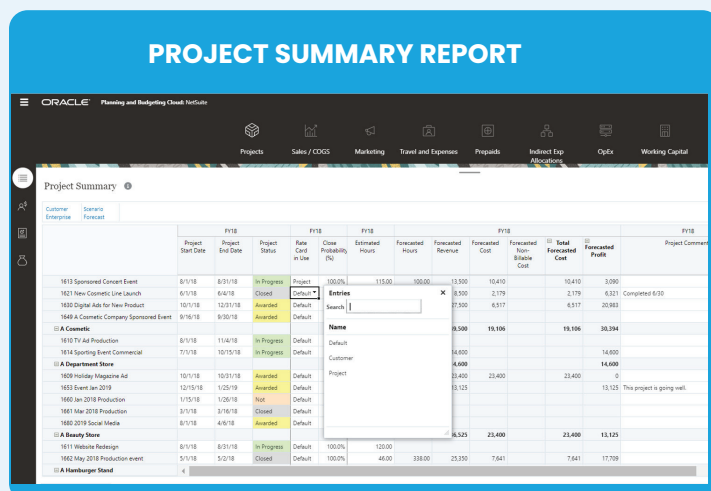
Leveraging EPM tools such as BI / Data Analytics and FP&A tools empowers companies to enhance financial visibility, support strategic decision-making, streamline operations, ensure compliance, and facilitate scalable growth. These benefits collectively contribute to achieving operational excellence, driving profitability, and maintaining a competitive edge.



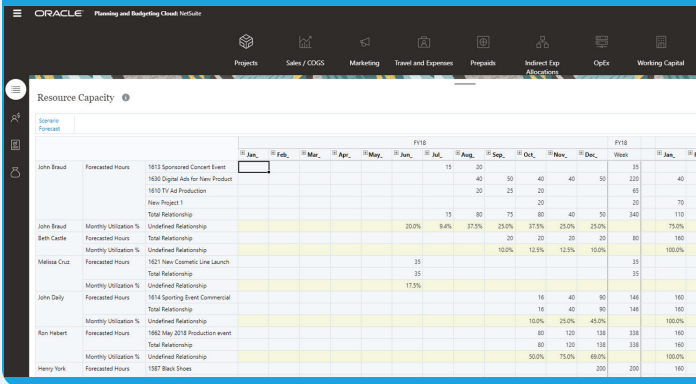
When using NetSuite tools, such as NetSuite Planning and Budgeting (FP&A) and NetSuite Analytics Warehouse (BI / Data Analytics), companies gain the benefit of automated, pre-built data flows between NetSuite ERP modules and the EPM modules. That said, when working with Caravel, companies will not only gain efficiency in real-time reporting, forecasting and planning, but will also gain efficiencies in the initial implementation of the NetSuite EPM products.

Caravel has created an offering for services companies, which include pre-configured dashboard and reports, both for the NetSuite Planning and Budgeting and NetSuite Analytics modules. These dashboards and reports allow such organizations to get a head start on their use of the tools, while also leveraging leading practices.

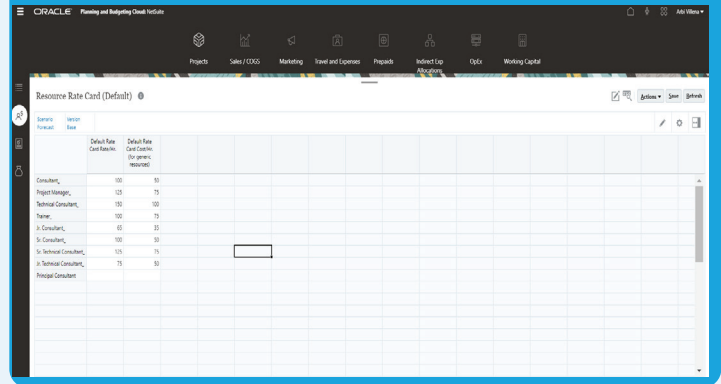
**The Caravel NSPB for Services offering includes key reports for services companies – identified below:**



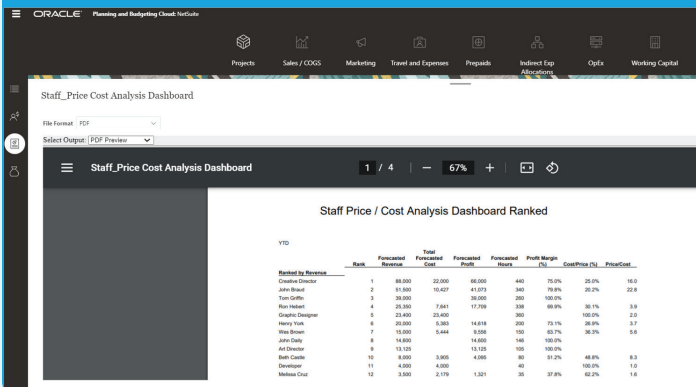
## RESOURCE CAPACITY REPORT



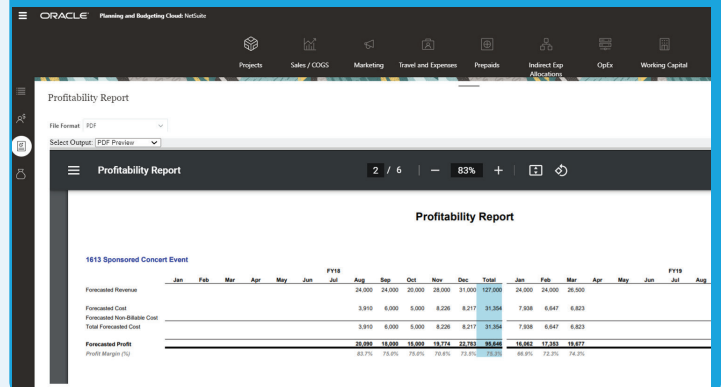
## RESOURCE RATE CARD REPORT



## STAFF COST ANALYSIS REPORT



## PROJECT PROFITABILITY REPORT



For those leveraging the NetSuite Analytics Warehouse (NSAW), Caravel has included similar profitability reporting, as well as dashboards to help organizations quickly analyze productivity, budget burns, sales cycle metrics, and employee performance.

Next is a screenshot of the pre-built Caravel NSAW Dashboard for Services organizations.



### CONTACT US

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In addition to dashboarding, Caravel also includes pre-built detailed reports in their NSAW for Services offering. Below is an example of an Employee Profitability report within NSAW, which is crucial for services organizations to help understand metrics such as resource allocation optimization, performance evaluation incentives, training needs, cost control, and benchmarking.

AVG Employee Productivity (%) by Employee Department, Employee Role, Employee Name, Service Date (Month)															
Employee Department	Employee Role	Employee Name	January 2023	February 2023	March 2023	April 2023	May 2023	June 2023	July 2023	August 2023	September 2023	October 2023	November 2023	December 2023	
			AVG Employee Productivity (%)	AVG Employee Productivity (%)	AVG Employee Productivity (%)	AVG Employee Productivity (%)	AVG Employee Productivity (%)	AVG Employee Productivity (%)	AVG Employee Productivity (%)	AVG Employee Productivity (%)	AVG Employee Productivity (%)	AVG Employee Productivity (%)	AVG Employee Productivity (%)	AVG Employee Productivity (%)	
Facilities Management	Janitor	Ashley Rodriguez	49.00	65.29	61.77	60.17	73.50	46.50	64.33	61.75	57.91	71.89	65.10	57.91	
		Christopher Garcia	63.75	68.00	56.00	69.67	60.63	52.88	61.30	67.10	57.44	68.14	47.29	66.75	
		David Wilson	63.58	55.78	68.80	53.10	71.00	58.54	61.92	71.67	68.43	69.00	59.25	58.08	
		Emily Brown	64.50	65.88	45.88	52.70	63.70	55.11	57.65	50.92	66.27	61.86	55.20	50.20	
		Emma Wilson	51.82	58.63	65.60	54.57	48.25	60.40	62.83	69.89	64.00	45.00	58.56	63.00	
		James Lee	61.57	72.00	57.63	58.89	53.75	59.67	68.88	60.89	53.50	56.13	52.67	54.50	
		Jane Smith	67.60	58.20	69.17	50.14	65.00	64.83	59.00	64.00	71.80	54.89	69.00	55.20	
		John Doe	68.00	50.86	64.14	53.00	62.38	57.00	62.80	58.31	60.18	42.50	65.00	50.78	
		Michael Johnson	64.33	61.09	70.17	49.40	57.22	49.14	54.17	46.08	70.88	66.50	66.00	67.56	
		Sarah Martinez	75.20	58.25	56.10	52.67	60.00	52.33	56.38	68.14	55.83	61.60	55.30	57.58	
	Maintenance Technician	Ashley Rodriguez	54.29	66.60	68.40	61.30	59.80	60.00	56.67	71.00	45.50	58.88	76.00	66.07	
		Christopher Garcia	59.33	59.14	53.29	76.75	77.63	57.20	57.67	66.83	67.17	59.43	62.00	59.38	
		David Wilson	45.00	68.44	53.00	58.00	50.90	56.00	38.29	60.86	60.11	52.25	49.63	61.57	
		Emily Brown	69.80	51.17	73.88	56.25	47.00	53.33	59.60	60.00	70.17	72.33	50.00	46.67	
		Emma Wilson	71.80	73.33	64.00	68.83	67.00	61.80	60.20	65.33	56.56	70.75	63.10	68.75	
		James Lee	61.50	77.14	64.29	57.00	81.75	66.17	77.57	60.64	59.92	62.33	53.25	73.55	
		Jane Smith	52.38	64.33	48.33	67.67	57.09	74.43	61.33	60.57	58.00	47.44	66.44	63.00	
		John Doe	56.43	56.00	67.45	64.85	57.86	59.50	60.75	50.67	58.82	58.78	65.71	71.29	
		Michael Johnson	58.83	47.00	51.92	62.13	58.85	57.83	64.33	50.38	54.38	44.83	67.38	67.23	
		Sarah Martinez	59.38	53.23	62.29	61.92	56.50	56.00	48.50	79.00	67.30	64.67	64.56	57.29	

In working with Caravel, services organizations can be efficient, gain leading practice understanding, and get a head start on their NetSuite Planning and Budgeting or NetSuite Analytics Warehouse module implementations.

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REGIONAL ALLIANCE OF  
THE YEAR - NORTH AMERICA

## About Caravel

Caravel has served more than 500 clients over the past decade, providing a comprehensive range of services, including accounting, strategy, business processes and technology selection. Our commitment to excellence drives us to continually improve and refine our approach, helping our clients solve complex problems with modern tools.

Caravel is proud to be a part of the technology services group of BPM LLP, a top 40 accounting and advisory firm. With our team by your side, you can unlock your business’s true potential and drive success in an ever-evolving marketplace.