

**CARAVEL**

BPM Technology Solutions

CUSTOMER PROFILE

Industry: Financial Services

Bridgeway Capital, Inc.



Bridgeway Capital is a social-impact investor focused on equitable growth in undercapitalized communities in western PA and beyond.

HQ: Pittsburgh, PA **Founded:** 1990 **Employees:** 50

Existing ERP: Abila MIP

Other systems: Salesforce, Excel, Paychex

Customer Challenges: Multiple instances of MIP, which created a consolidation nightmare. Difficult managing loans and connecting systems.

Deal Competitors: Intacct

Why we Won: we were selected for our industry expertise and NetSuite's expansiveness in being able to handle loan management if needed, but also NSAW, NSPB as future state

Caravel teams:

Erica Kyriakides, Jake Waters

NetSuite Implementation

NetSuite sales

team: Jon
Clarkson, Dave
Silver

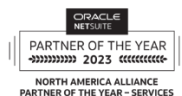
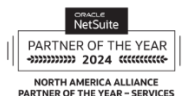
NetSuite: Social Impact Standard

Methodology: SuiteSuccess + Optimization

Modules: Record to Report, Procure to Pay, Project to Cash, Order to Cash, NetSuite Analytics Warehouse

Interfaces: PNC, First National Bank of PA, Charles Schwab, ADP, Ramp, Nortridge

Approach: Bridgeway Capital will deploy NetSuite in a single phase with core functionality going live in month 6 and integrating to various 3rd party systems in phase 1.



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