

**CARAVEL**

BPM Technology Solutions

**CUSTOMER PROFILE**

# Industry: Financial Services

## Conserv Capital Inc

**Conserv Capital**

At Conserv Capital, we specialize in helping people get to work. Many experienced contractors do not qualify for traditional bank loans, which is where we step in.

**HQ:** Nashville, TN. **Founded:** 2015 **Employees:** 50

**Existing ERP:** Microsoft Business Central

**Other systems:** Salesforce, BILL, Excell, Nextep, Cadence Bank, Orion (Loan/Lease Management)

**Customer Challenges:** Challenges tracking loan detail, disparate systems, poor integrations, growth plans without systems to support.

**Deal Competitors:** N/A

**Why we Won:** NetSuite came as a recommendation, however financial services industry experience and a thoughtful sales process led by Kyle was the key to winning

**Caravel teams:**

Erica Kyriakides, Jake Waters

## NetSuite Implementation

**NetSuite sales**

**team:** Kyle Miller,  
Donner Boroian,  
Hank San

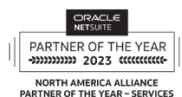
**NetSuite:** Financials Standard

**Methodology:** Suite Success + Optimization

**Modules:** Record to Report, Procure to Pay

**Interfaces:** BILL, Orion, Salesforce, NetGain

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

**CONTACT US:**

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