



Industry: Financial Services

Defi Technologies



DeFi Technologies is a technology company that allows traditional investors to identify and invest in a diversified portfolio of digital assets across the decentralized finance and Web3 sector. We capture the upside in the explosive growth of digital assets and the future of finance via regulated equity instruments. We are the only publicly traded company built to give investors direct exposure to these nascent markets.

HQ: Toronto, ON. **Founded:** 2019 **Employees:** 50

Existing ERP: Spire/ abacus

Other systems: N/A

Customer Challenges: No formal systems - manual consolidations - manual reporting

Deal Competitors: Other partners - KPMG - and customer evaluated Intacct as well

Why we Won: N/A

Caravel teams:

Jake Waters, Kelly Gonyea

NetSuite Implementation

NetSuite sales

team: Matt Joseph, Caleb Kappler

NetSuite: Financials First

Methodology: Suite Success - optimization in phase II

Modules: Record to Report, Procure to Pay

Interfaces: Cryp.io

Approach: Will deploy NetSuite in a multi-phase with core functionality going live in month 3 and optimization in the second phase

