

**CARAVEL**

BPM Technology Solutions

ABOUT US

# Caravel at a Glance.



Caravel is a full-service NetSuite, Salesforce, Technology, and Accounting Services firm with the ability to provide end-to-end services for prospects and clients.

Below is some demographic information on Caravel.

**# of implementations****750+****NETSUITE  
IMPLEMENTATIONS****# of global  
deployment centers****4****US, CANADA ,  
PHILIPPINES & INDIA****# of employees****1,200+****BPM + CARAVEL  
EMPLOYEES****GLOBAL  
OFFICE  
LOCATIONS**

San Francisco  
Bay Area  
Southern California  
(Irvine & Long Beach)  
Central California  
(Stockton)

Boston  
Eugene  
Fairfield  
New York City  
Seattle

Bengaluru  
Cayman Islands  
Philippines  
Toronto

## Services.

### ADVISE



Caravel's Select Practice focuses on helping Customers make the right decisions as quickly and cost effectively as possible.

### DEPLOY



Deploying ERP software is more than just a configuration exercise but rather a business transformation event to re-align business processes with leading practices organizationally.

### ASSESS. DEFINE. SELECT. REALIZE.

- **Select Assessment** – Help Customers optimize their existing business processes and determine the “What, When and How” around selecting the right software or technology platform to support those processes: Front Office (CRM), Back Office (ERP, SCM, HCM & EPM) or IT Ops.
- **Technology Selection** – Help clients gather, catalog, and prioritize requirements to aid in selecting the right technology or software application to support the business initiatives.
- **Project Management** – Help clients manage the projects at a detailed level to ensure project objectives, expectations, timeline, and budgets are met.

### MORE THAN JUST CONFIGURING SOFTWARE.

Our goal is your goal: Help you leverage your software investment to do more with fewer people while driving leading scalable practices across the enterprise as quickly and cost effectively as possible.

- **Flexible Deployment Model** – Caravel offers a Standard (“Emerging”) and Premium Implementation Model based on Customer’s deployment strategy. Standard offering a more rapid, out-of-the-box deployment with Premium offering more of a “white-glove” service.
- **Business Process Optimization** – Focus on leading practices, ease of use and system supportability.
- **PMO** – Properly monitor, measure and enforce accountability to ensure the business outcome, timeline and budget are met.

### SUPPORT



Caravel helps Customers support their ERP and CRM environments as much or as little as needed based on a customer’s internal capabilities to support the application themselves.

### EXTEND



Accounting Services to help customers augment their internal accounting resources from a staff augmentation, outsourced accounting, implementation readiness, tax, SOX compliance or audit perspective.

### ERP & CRM SYSTEM SUPPORT WHILE YOU FOCUS ON THE BUSINESS.

- System Administration, Functional, & Technical Support for NetSuite, Salesforce.com, QuickBooks, and Sage Intacct.
- Training and User Enablement.
- Upgrade Assistance.

### ACCOUNTING SERVICES.

Caravel's team of accountants is well versed in various business application systems ranging from QuickBooks, Xero, Sage Product Lines including Intacct, Microsoft and NetSuite. Caravel's team of accountants can help fill a need on a temporary, full-time or project by project basis.

- Outsourced Accounting.
- Technical Accounting.
- Compliance (SOX, HIPAA, ISO, Etc.)



## Vertical Focus.

Caravel works with a diverse set of clients across various industries. This tangible experience translates into tangible services that Caravel can provide to its customers: leading practices, system configurations and extensions, pre-built integration, IP and general consulting/working knowledge that customers can rely on when navigating business process, system and integration considerations.



### HIGH TECH

SAAS, Software Internet Services,  
High-Tech Mfg,  
Advertsing/Media



### FINANCIAL SERVICES

Fin-Tech, Insurance, Crypto,  
Lending, Banking, Real Estate,  
Private Equity



### MEDICAL

Med-Tech, Pharma, Clinics,  
Hospitals, Wellness, Med Device,  
Med Billing, Vet



### PRO SERV

Consulting, Staffing, Legal,  
Maintenance, Field Service,  
Accounting



### PRODUCTS

Consumer Goods, W/S Dist,  
Retail, E Comm, Food & Bev,  
Brand Merch, Logistics



### MANUFACTURING

High-Tech Manufacturing,  
Discrete, Process, Industrial



### CONSTRUCTION & REAL ESTATE

Residential, Commercial,  
Pre-Fab, Solar



### RENEWABLE ENERGY

Solar, Battery, Wind, Utilites,  
Field Service Mgmt



### NON-PROFIT GOVT OTHER

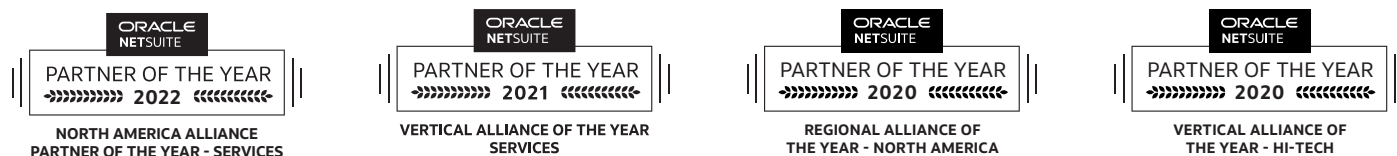
Non-Profit, Govt-DCAA,  
A&D, Associations, Hospitality,  
Agriculture, Franchise, Sports



## Honest to a Fault.

The consulting industry is plagued with firms willing to take advantage of a customer's inexperience around budget, deployment timeline, and software knowledge. At Caravel, we are upfront and honest about everything. The reality is that implementing ERP software (if done right) is difficult. It takes time and money. Caravel would rather forfeit jobs to other firms promising cheaper pricing and unrealistic timelines than cut corners and costs at the detriment of the customer. Our goal is to meet customer expectations on Day 1 by finding the best fit for an implementation and helping to set customers up for success from the start.

Technology projects are transformative and imperfect by their very nature, involve business disruption and time from companies most valuable resources. There will be unforeseen challenges that present themselves. Caravel's commitment is that we will be there every step of the way as we view this as a partnership – your business goals and objectives are ours as well. We are not a perfect or error free organization but try to continually improve and refine our approach in an ongoing effort to deliver excellent services.



## 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.

