



CARAVEL

BPM Technology Solutions

UNITED ROAD CASE STUDY

United Road Unifies Departments & Data with NetSuite Implementation

The Company

United Road is a premier automotive transport expert, shipping more than 4 million vehicles annually for 10,000+ customers throughout North America. Established in 1997, the company offers unparalleled service to significant automakers, manufacturers, remarketers, financial institutions, leasing companies, and many more.

Prior to implementing NetSuite, United Road's initial systems included the ERP Sage MAS500, SiSense, Paycom, Renovo Financial Reporting, Power BI, and more. Their implementation timeline was eleven months, with integration into various systems.



COMPANY NAME

United Road

EMPLOYEES

700+

INDUSTRY

Services

REVENUE

\$588M

ERP REPLACEMENT

SAGE MAS500



In our old reporting system, we had hundreds of legacy reports that were used maybe once. Everyone had their own local copy of it, whereas now, everything is in one place, accessible by everyone.

— Kevin Kirkpatrick,
Senior Director of Operations Technology



THE CHALLENGE

A PATCHWORKED ACCOUNTING SYSTEM

Before implementing NetSuite, United Road had been using an old accounting system that had been continuously patchworked in order to function for them. It had become unsupported and had many legacy custom scripts that only a few United Road employees had knowledge of. They were in great need of a system that could grow along with them.

DEPARTMENTS WERE SILOED AND WORKING INDEPENDENTLY

Many of United Road's departments were working in silos before the implementation, plus they had a number of applications (including a leasing app, a fixed assets application, and more) that worked independently of their primary accounting system.

Another issue was that the accounting team, who was working on fixed assets, wasn't "talking" to the AP team. Departments were siloed.

A GREAT NEED TO STREAMLINE WORKFLOWS AND PROCESSES

The company was also looking for something supportable and wanted to streamline workflows and processes, and NetSuite was able to provide this with its out-of-the-box elements, such as using AP vendor payment with bank integration as well as some of the more custom elements such as 1) Using Boomi as a gateway for automation for their Transportation Management System (TMS), Fleet Maintenance (TMT), and Origami Risk Management system, and 2) Caravel's IP solution that allows a user to approve transactions via email.

THE SOLUTION



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United Road had looked at many options in the ERP space, and NetSuite was a great fit that was able to grow along with them and consider their complexities. They wanted to partner with a progressive technology company that could integrate seamlessly with other systems. They were looking for something that could scale alongside their company growth.

The company was looking to pair up with a partner who was a NetSuite expert who had hundreds of implementations under its belt. Someone who was willing to take the journey with them into a new ERP system, which not only involved implementation, but also training and support post-implementation. They wanted a company that would

let them in on NetSuite best practices, and to challenge their team by letting them know if they weren't utilizing it correctly and to advise them that there are better ways to get the best out of it. "Our teams needed a bit of time to get used to the system, after being on an old system for so long," says Kevin Kirkpatrick, Senior Director of Operations Technology. He continues, "Being more efficient has taken a bit of time, but we are really getting there. One of the great things from Caravel was the hands-on training, documentation, sessions, and on-demand videos, so that when new employees come on, they can get up to speed fairly quickly."

THE RESULTS



The implementation was done in strategic phases, with the most significant portion done first, followed by ancillary projects.

United Road is now able to have more data “on-demand”. NetSuite data is now integrated with their data lake allowing quicker access to it.

They can now easily pay vendors on time, collect AR, and run their day-to-day book closure much faster. It’s been a huge process improvement overall, and foundationally, there is even more they want to implement, which NetSuite provides, and Caravel implements.

They are no longer limited by a traditional accounting system and are able to customize on top of it. Things like expense management, tax management, and other additional pieces they will be including are going to be much simpler to implement.

Now, their departments work hand-in-hand, and there are no more silos within the organization. Everything is under one roof, and employees can work off the same platform with access to the same information. There is a lot less reporting

they have to do now, since all the information is available to everyone. “In our old reporting system, we had hundreds of legacy reports that were used maybe once. Everyone had their own local copy of it, whereas now, everything is in one place, accessible by everyone,” says Kirkpatrick.

Especially on the accounting side, they’re able to think of new workflows and reporting that was not able to be done before on the old system.

“Caravel did a great job bringing in experts in each area. One in core accounting, one in AP, one in AR, so we had a consultant working with us in each vertical. This was great because our team was able to divide and conquer.”

Although the project with United Road was complex, watching their ideas come to life was a fantastic opportunity for Caravel. United Road had a vision to transform the way they did business, and Caravel was there every step of the way to assist them in achieving that goal.

To get help with your NetSuite implementation, contact us.



About Caravel

Caravel has served more than 750 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.

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