

**CARAVEL**

BPM Technology Solutions

CUSTOMER PROFILE

Industry: High-Tech

Altify

Altify empowers B2B sales teams to win bigger, faster, and more predictably with its AI-enhanced, 100% Salesforce-native solutions. By aligning sales execution with customer needs, they help revenue teams map key relationships, uncover business insights, qualify and manage deals, and maximize account growth—all within Salesforce.

HQ: Portsmouth, NH **Founded:** 2025 **Employees:** 30**Existing ERP:** NetSuite**Other systems:** Expensify, Salesforce, Adaptive, ADP, Strip, JPMorgan Chase**Customer Challenges:** Needed to replace their existing systems due to carveout.**Deal Competitors:** Centrilogic**Why we Won:** We won based on PE relationship and consultative approach.**Caravel teams:**

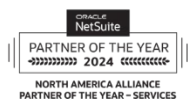
Corey Ruane

Rob Cupka

NetSuite Implementation

NetSuite sales team:

Taylor Cossu

NetSuite: Software Standard**Methodology:** SuiteSuccess + Optimization**Modules:** Financials, Procure to Pay, Order to Cash**Interfaces:** Banking, Expenses, CRM**Approach:** Altify will deploy NetSuite in a single phase with multiple 3rd party integrations. Phase 2 will consist of a Salesforce CPQ integration**CONTACT US:**714-253-4455 or info@caravel-partners.com | caravel-partners.com