Industry: Financial Services

Interaudi Bank

At Interaudi Bank, their core mission is simple - to provide personalized private banking services and care to each and every one of their clients. To achieve this goal they rely on their team of innovative and talented professionals who share their vision.

HQ: New York, NY   **Founded:** 1983   **Employees:** 140

Existing ERP: BankMate

Other systems: Salesforce, AvidExchange, Expensify, Cerifdian Dayfore, Interaudi Bank, Proprietary Data Warehouse, Orion Assessment Management

Customer Challenges: Intercompany & Consolidation, Foreign Currency Reporting, Forecasting, Data Analytics

Deal Competitors: SAP

Why we Won: Due to the user adoption of NetSuite and its scalability as well as the competence of the implementation team.

Caravel teams:
Frank Herr, Jake Waters

NetSuite Implementation

NetSuite sales team:
James Wilson, David Silver

NetSuite: Financials First STD

Methodology: SuiteSuccess + Optimization

Modules: Financials, Record to Report, Procure to Pay, NSPB, NSAW

Interfaces: Banking, Ceridian Dayforce, AvidExchange, Expensify, Asset Management Tool

Approach: Interaudi Bank will deploy NetSuite in a single phase with core functionality going live in month seven.