



## YOUR EXPERIENCE WITH CARGAS

Everything you need to know about our company, our culture, and what you can expect while evaluating software for your business.

**CARGAS®**

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## WELCOME

We're so excited you've chosen to learn more about Cargas and our software products.

Our customers are doing some pretty amazing things by thinking strategically about technology and using it to support their business goals. Our team can't wait to learn more about your needs and your business so we can work with you to design your ideal solution.

We carry out our work with a clear purpose, vision, and values. These concepts guide us as we work with each other and with customers like you. We believe our relationship with our customers is a long-term partnership. Read on to learn more about our company, our culture, and what you can expect from working with Cargas.

We look forward to working with you!

Sincerely,



Nate Scott, President & CEO



*"The implementation of Cargas actually beat our expectations. We completed it in about five months, and we accomplished our goal of hitting year-end and starting fresh in the new year. We are extremely excited, and it didn't feel like a business transaction at all. I truly felt like we were working with a collaborative partner."*

—Tyler Morgan, Senior Accountant, Mid Atlantic Machinery

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## ABOUT CARGAS

Cargas is an employee-owned software company with nearly 200 employees offering ERP and CRM solutions from Microsoft, Sage, Salesforce, HubSpot, and Acumatica, as well as custom-developed products. We sell the software, set it up, teach customers how to use it, and help them adapt it as their needs change over time. Our products streamline day-to-day processes for our customers so they can focus on what's most important—growing and running their businesses.

### OUR PRODUCTS

Sage Intacct Accounting Software

Acumatica

Microsoft Dynamics 365 Business Central

Microsoft Dynamics GP

HubSpot CRM

Microsoft Dynamics 365 CRM

Salesforce CRM

Cargas Energy

Cargas Pay

### OUR SERVICES

Software sales

Setup (including data migration, configuration, and implementation)

Training

Support

Custom development (including custom integrations, interfaces, add-ons, and solutions)

*"Cargas's support is fantastic. We appreciate their willingness to listen to what we want to do and offer a pragmatic, collaborative approach to finding the best solution. They not only know the products but also understand our company's processes."*

—Melissa Lutz, Business Manager of Urethane Intermediates, Gantrade

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## COMPANY HISTORY

From the very beginning, Cargas has done things a little bit differently. In 1988, Chip Cargas founded our company on the notion that creating a great place to work attracts talented and motivated employees who are uniquely invested in the success of our business and our customers.

We began reselling finance and operations software in 1993 as a Great Plains software partner, then added Microsoft ERP and CRM solutions into our offerings after Microsoft acquired Great Plains in 2001.

To meet unique customer needs, we established a custom development team that builds fully customized solutions as well as adapts and integrates out-of-the-box software.

In 2005, we launched Cargas Energy, our own software product and mobile applications for fuel delivery companies. We added Sage Intacct accounting software to our resale and implementation offerings in 2012, Salesforce CRM in 2021, HubSpot CRM in 2022, and Acumatica in 2024.

Today, we're proud and honored to be a thriving software and services company with nearly 200 employees and an outstanding reputation with our customers and our community.

## OUR ACCOMPLISHMENTS

Our unique company culture fosters a commitment to excellence, a dedication to teamwork, and a high level of customer care. We are honored to be recognized for these accomplishments.



- Best Places to Work in PA
- Inc. Best Workplaces
- Inc. 5000 Fastest-Growing Private Companies
- Central Penn Business Journal Top 50 Fastest Growing Companies
- Samaritan Counseling Center Ethics in Business Award
- NCEO Innovations in Employee Ownership Award
- Central Penn Business Journal Business of the Year

*"I've been in the Microsoft ecosystem for over 30 years, but it's different when you're trying to build a solution for yourself. Cargas got it from the start and saved us a ton of time on the implementation."*

**—Alejandro Rosado, Jr., Founder and CEO, 12:34 MicroTechnologies**

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# FOUNDED ON CULTURE

## OUR PURPOSE: SHARED SUCCESS

The reason we exist—our core company purpose that guides everything we do—is to provide shared success. That means we're just as focused on the success of our customers, employees, owners, partners, and community as we are on the success of our business.

## OUR VISION: BUILT TO LAST

To ensure that our company remains viable for future generations of employee-owners, we focus on ownership and leadership succession at all levels of our organization, and we follow a sustainable growth strategy.

## OUR VALUES

We follow three core values to support our company purpose and vision.

**TEAMWORK.** We share information. We collaborate. We are inclusive. We have integrity. We support each other in balancing family and work. We work hard and have fun.

**CUSTOMER CARE.** We listen, understand, and anticipate needs. We solve problems, communicate clearly, and follow through. We help our customers succeed.

**EMPLOYEE OWNERSHIP.** We think and act like owners. We are inspired by direct employee ownership. We practice sustainable growth and are built to last.

## EMPLOYEE OWNERSHIP

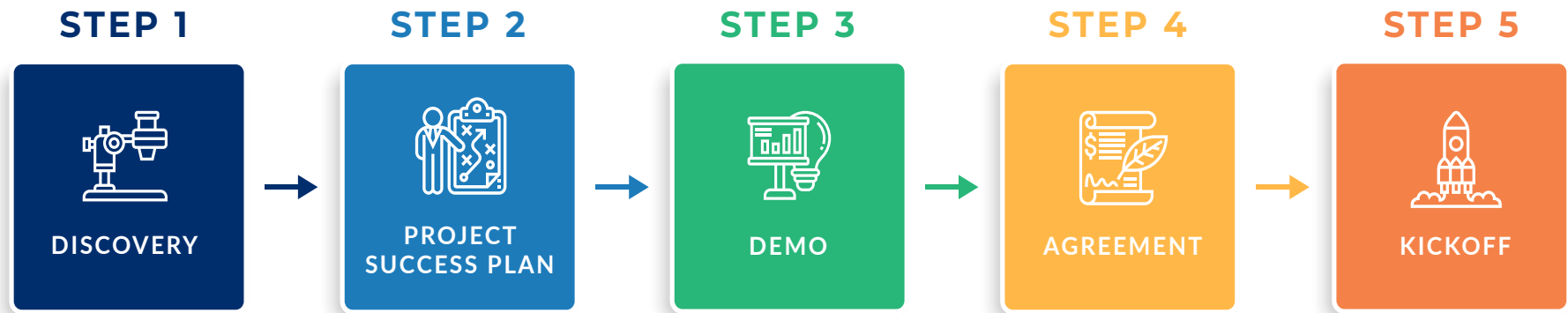
Our employee ownership program allows any employee to become a Cargas shareholder and is key in helping us attract and retain a highly-motivated team. Today, nearly 90% of our team members have made the personal financial commitment to purchase stock in our company. Because our employees have personally invested in our business, they are also personally invested in your success.

## SUSTAINABLE GROWTH

Balanced long-term growth has been an integral part of our business strategy from the beginning. Our Board of Directors is committed to growing our company sustainably so we can consistently achieve high levels of customer and employee satisfaction.

## ETHICAL PRACTICES

We're committed to being fair and ethical in all of our business operations, and we challenge all employees to ensure that everyone understands and shares the same ethical business values. We don't just comply with the letter, spirit, and intent of all applicable laws and regulations—we uphold the highest standards of conduct and personal integrity and act in a way that merits the continued trust and confidence of our customers, partners, and team members.



## OUR SALES PROCESS

When you need new software, it's important to move through the selection process carefully. This description of our five-step method will help you understand what it's like to work with Cargas.

### STEP 1: DISCOVERY

This step is crucial. It lays the foundation for the rest of the process. During this stage, we'll hold a discovery session to learn about your needs, requirements, timeline, and ideal vision for the future.

### STEP 2: PROJECT SUCCESS PLAN

This valuable document outlines what we heard you say during discovery (your key success criteria) and includes our solution recommendations, a formalized estimate, demo agenda, and selection plan timeline.

### STEP 3: DEMO

After confirming your demo agenda in the Project Success Plan, we'll deliver a completely personalized demo that addresses your specific needs and requirements.

### STEP 4: AGREEMENT

We'll take everything we've learned and deliver your Project Agreement. This document lays out our detailed recommendations for you to achieve your ideal vision for the future, including your final solution design, cost, and scope of work.

### STEP 5: KICKOFF

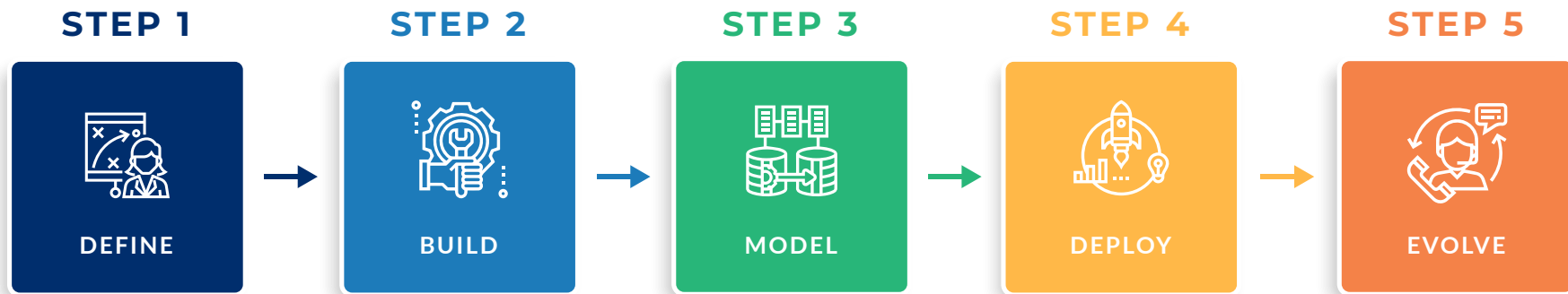
Welcome to the Cargas family! Now that you've signed the agreement, it's time to meet your team. You'll be assigned a dedicated project manager who will guide you through the next steps in the process and oversee your implementation. Congrats!

*"The people and the service set [Cargas] apart. Everyone is quick to help out and take care of us. You don't find that everywhere."*

—Matthew Engle, Financial Analyst, Byler Holdings

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## OUR IMPLEMENTATION PROCESS

Our implementation process has been carefully developed and honed to ensure your success. By following this proven method, our customers have achieved a 99% implementation success rate.

Implementation begins immediately after you sign your agreement. Your project manager will reach out to schedule your project kickoff meeting and review all the details about getting started, key milestones, and more.

### STEP 1: DEFINE

What we do during this step will guide the rest of your project. We start by developing your Functional Requirements Document, which defines how we'll design your solution. We'll also review key details like security, reports, and the testing scenarios we'll use in the next step.

### STEP 2: BUILD

Your implementation consultant will work with your team to configure the software in accordance with your Functional Requirements Document. We'll also import your historical data and master records. Once the software is configured, we'll copy the environment for testing.

### STEP 3: MODEL

Your implementation consultant will work with your team to test the software and teach them how to use it. Based on the testing results and your team's feedback, we'll make final revisions to the software. Once your team signs off on training, we'll begin planning your official transition to your new software.

### STEP 4: DEPLOY

On your go-live date, we'll work with your team to complete a final data migration and verify the new system is up and running. We'll remain by your side through your first month as you start working in the new software.

### STEP 5: EVOLVE

From here, you'll work with a dedicated account manager who will help you build a plan to develop your software as your needs change over time. Your account manager and our support team are always on standby to help you be successful with your software!



## QUESTIONS TO CONSIDER

Below are some of the questions we'll cover during our discovery meeting.  
Feel free to review them in advance.

- 1 What are some current challenges you're looking to solve and have you tried to solve them before?
- 2 Who is this impacting and how often?
- 3 What are your ideal solutions to these challenges?
- 4 Why do you want to solve them now?
- 5 What are all of the systems you are currently using?
- 6 What is the most important criteria for a new system?
- 7 What obstacles might cause this project to delay or not move forward?
- 8 What does your timeline look like?
- 9 How did you establish a budget?
- 10 How will you measure this project's success?



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