



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[®]

CONTENTS

- 1 WELCOME
 - 2 ABOUT CARGAS
 - 3 COMPANY HISTORY
 - 4 FOUNDED ON CULTURE
 - 5 OUR SALES PROCESS
 - 6 CRM SALES TEAM
 - 7 OUR IMPLEMENTATION PROCESS
 - 8 CRM IMPLEMENTATION LEADERSHIP & SUPPORT TEAM
-



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



"What I appreciated about the Cargas team is that they stuck with us as we changed our scope of work three times during the project. They were patient with us as we got our arms around what we needed to do."

– Memie Siwec, Project Manager, Community First Fund

[READ CASE STUDY](#)

ABOUT CARGAS

Cargas is an employee-owned software company with more than 170 employees offering software from Microsoft, Sage, and Salesforce, 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 processes in accounting, supply chain management, and sales and marketing so customers can focus on what's most important—growing and running their businesses.

OUR BUSINESS UNITS

CRM. Dedicated to the resale, implementation, and support of CRM products from Microsoft and Salesforce, and HubSpot.

ERP. Dedicated to the resale, implementation, and support of ERP products from Sage and Microsoft.

Development Solutions. Dedicated to the development of fully custom solutions, as well as custom integrations, interfaces, and add-ons for our out-of-the-box products.

Cargas Energy. Dedicated to the development, implementation, and support of Cargas Energy, our proprietary product for fuel delivery and HVAC service companies.

OUR PRODUCTS

Salesforce Sales Cloud

Microsoft Dynamics 365 CRM

Sage Intacct Accounting Software

Microsoft Dynamics 365 Business Central

Microsoft Dynamics GP

HubSpot

Cargas Energy

OUR SERVICES

Software sales

Setup (including data migration, configuration, and implementation)

Training

Support

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

"Cargas is efficient, quick, and understands our processes, unlike any other developers I've ever worked with. Going forward, I'll always use Cargas for any development work and special Salesforce needs."

– John McNerney, Interim CEO, Pennsylvania Association for the Blind

[READ CASE STUDY](#)

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 and Salesforce Sales Cloud in YOUR EXPERIENCE WITH CARGAS.

Today, we're proud and honored to be a thriving software and services company with more than 170 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

"They make the time and effort to gain an intimate knowledge of how your organization works and what it needs. They know our business, understand the challenges we face, and help us overcome obstacles."

– Mario Mugrace, Senior Network Engineer, Lydall, Inc.

[READ CASE STUDY](#)

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

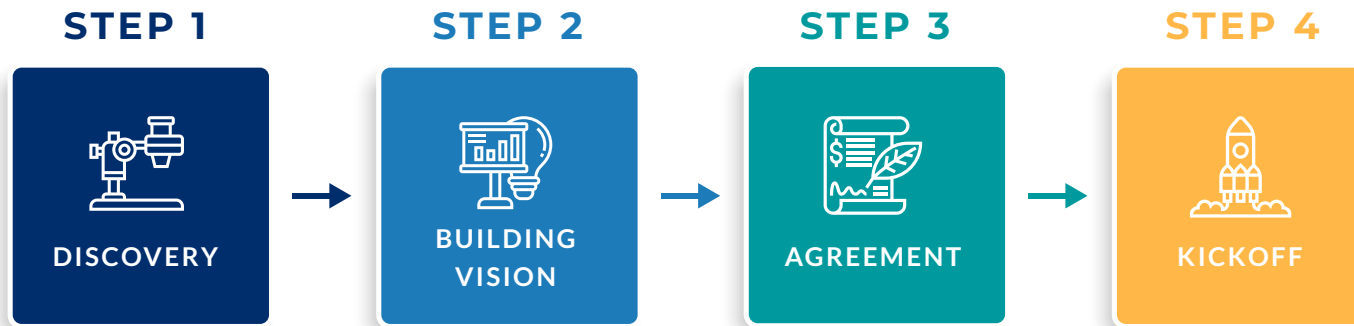
Our employee ownership program allows any employee to become a Cargas shareholder and is key in helping us attract and retain a highly-motivated team. Today, nearly 72% of our team members have made the personal financial commitment to purchase stock in our company. Because our employees have personally invested in our company, 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 process 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: BUILDING VISION

During this stage, we'll prepare a preliminary Summary of Findings that includes our findings, solution recommendation, and estimated costs. We will also deliver a targeted demo if necessary.

STEP 3: AGREEMENT

We'll take everything we've learned and deliver your Project Success Plan. 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 4: 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!

"Cargas is efficient, quick, and understands our processes, unlike any other developers I've ever worked with. Going forward, I'll always use Cargas for any development work and special Salesforce needs."

– Kelsey Fisher, Marketing Manager Holiday Outdoor Decor

[READ CASE STUDY](#)

CRM SALES TEAM

Because we want to focus on solutions, not sales, our sales team does not earn commission. We use other programs like profit sharing and bonuses to incentivize our team so they can focus on your needs, not a sales quota.



ESTHER ANGELL
VICE PRESIDENT



WES KINTNER
BUSINESS DEVELOPMENT REPRESENTATIVE



ERIC GERVASE
SALES MANAGER



DEANNA FORBES
CUSTOMER SUCCESS MANAGER





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.

STEP 1: ANALYSIS

This phase 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. We will also evaluate your key requirements for the project.

STEP 2: DESIGN

Together, we'll map out how we'll design your solution, including forms, customizations, and reports. We will then present a design document for your approval to move into the development phase of the project.

STEP 3: DEVELOPMENT

Your implementation consultant will work with your team to configure and test the software. Based on your team's feedback, we'll make final revisions to the software. Once your team completes training, we'll begin planning your official transition to your new software.

STEP 4: DEPLOYMENT

We will train your team to utilize the software, then do final data migration and acceptance testing. Once that is all complete, we will go live with the system.

STEP 5: OPERATIONS

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!

"They made sure they understood our business and developed a solution in response to that. They didn't try to fit us into some sort of out-of-the-box solution. They built something that works for us. The experience working with Cargas was awesome."

– Stuart Smith, Vice President of Market Growth, Benchmark Construction

[READ CASE STUDY](#)

CRM IMPLEMENTATION LEADERSHIP & SUPPORT TEAM

Our consultants have been helping sales and marketing team optimize their operations for more than 15 years. They understand your unique challenges and requirements and are ready to help you build your ideal CRM system.



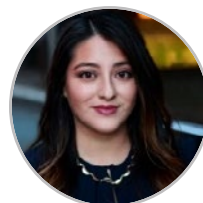
MEMIE WHITESIDE
TEAM LEADER



BRETT SMITH
SYSTEMS CONSULTANT



DANIEL HAYES
PROJECT MANAGER



JILLIAN MOLINA
SYSTEMS CONSULTANT



DAVE PACKARD
SYSTEMS CONSULTANT



TORU KAWATE
SYSTEMS CONSULTANT





101 North Queen Street, Suite 300, Lancaster, PA 17603

1.888.611.3138

info@cargas.com

cargas.com