



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



"Cargas's level of professionalism is now the bar that we set going into any implementation that we do. I've personally been a part of between six to eight implementations, and no other software partner has come close to matching the quality of the Cargas experience."

— John Jaques, Controller, Blue Mountain Resort

[READ CASE STUDY](#)

ABOUT CARGAS

Cargas is an employee-owned software company with more than 180 employees offering software from Microsoft, Sage, Salesforce, and HubSpot, as well as custom-developed products

OUR BUSINESS UNITS

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

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

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

Sage Intacct Accounting Software

Microsoft Dynamics 365 Business Central

Microsoft Dynamics GP

Microsoft Dynamics 365 CRM

Salesforce Sales Cloud

HubSpot Marketing Hub

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)

"We connected very well with everybody, and that made the process that much better. It's not even the process; it's the people. It's their knowledge of things. It's the way you set the process up, knowing the steps you need to take."

—Mary Kelly, CFO, CFAR

[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, Salesforce Sales Cloud in 2021, and HubSpot Marketing Hub in 2022.

Today, we're proud and honored to be a thriving software and services company with more than 190 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 recommend Cargas because they can provide the technical know-how and project management to get small businesses there. But more important, because they'll focus on helping you succeed."

—Jim Schultz, CEO & President, Applied Educational Systems, 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

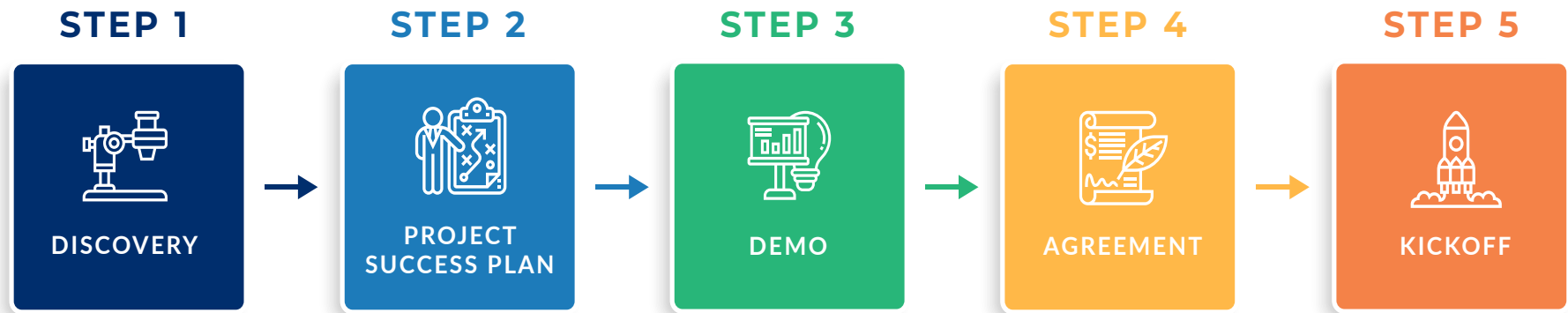
Our employee ownership program allows any employee to become a Cargas shareholder and is key in helping us attract and retain a highly-motivated team. Today, nearly 85% of our team members have made the personal financial commitment to purchase stock in our company. Because our employees have personally 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: 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!

[Watch this video](#) from our team to learn more about The Cargas Experience.

MEET YOUR 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.



MIKE YEAGER, VICE PRESIDENT

Credentials: Former CFO, Business Administration degree (Accounting concentration)



LAUREN DISSINGER, DIRECTOR OF ERP SALES

Credentials: CPA, former public accountant specializing in attest and corporate tax work



RYAN BUTZER, SALES CONSULTANT

Credentials: Former Treasurer, Senior Accountant, and CFO; Advanced Accounting Certification



KATIE GRAHAM, SALES CONSULTANT

Credentials: Former purchasing contract analyst for the largest hospital system in southeast PA



LAUREL MORSE, ERP SALES MANAGER

Credentials: Business Administration degree; Sage Intacct Solution Consultant certification



CHRIS STETLER, SOLUTION STRATEGIST (SAGE)

Credentials: More than a decade in banking and accounting, Business Management degree



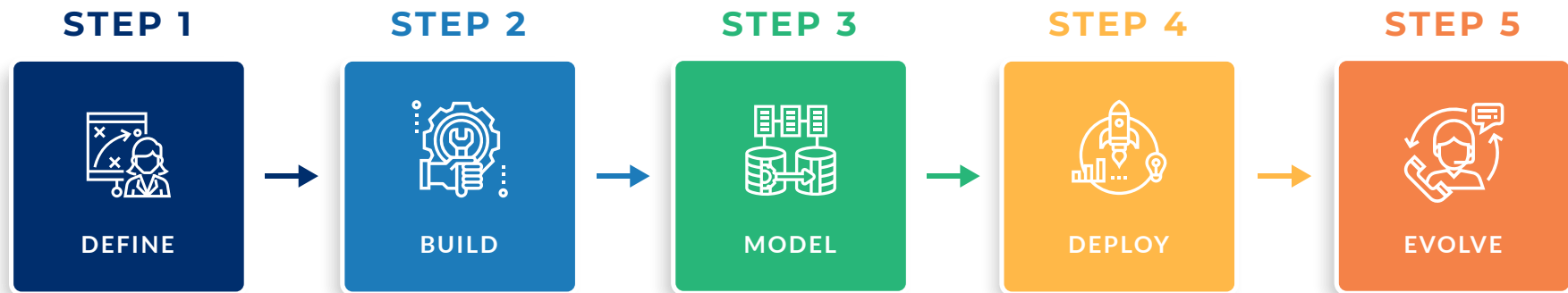
PAT BOSTICK, SOLUTION STRATEGIST (MICROSOFT)

Credentials: 40+ years of experience with ERP software; 15+ years of experience with Microsoft Dynamics products



JULIE FULLER, SALES DEVELOPMENT REPRESENTATIVE

Credentials: Cargas employee for 20+ years



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 your chart of accounts, reports, and the specific 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 bring over your opening balances from your legacy software and assist with first check runs. We'll remain by your side through your first month and assist with activities like bank reconciliation and financial reporting.

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!

MEET YOUR IMPLEMENTATION LEADERSHIP TEAM

Whether they're CPAs or former CFOs and controllers, nearly all of our consultants have real-world accounting experience.



TOM FALLOON, DIRECTOR (SAGE PRACTICE)

Credentials: Led the technology practice of a 70-person regional accounting firm; Mathematics degree



JODIE MACARIOLA, DIRECTOR (MICROSOFT PRACTICE)

Credentials: Cargas employee for 25+ years; degree in Quantitative Business Analysis



CHRISTIE LIVENGOOD, CONSULTING MANAGER

Credentials: Director of Operations & Distribution Manager, Power Packs Project; Executive Director, Lancaster Dollars for Higher Learning



CHARLIE SAVKO, CONSULTING MANAGER

Credentials: 10 years of experience in finance and IT; degree in Computer Science



DOUG PRICE, CONSULTING MANAGER

Credentials: Former CFO and VP of Finance and Administration; experience in accounting, operations, payroll, HR, compliance, and IT; degree in Health Policy and Administration



JEFF HARTMAN, CONSULTING MANAGER

Credentials: Former CFO, COO, and controller; BS in Accounting and MBA in Finance



TIM OTT, PM MANAGER

Credentials: Customer-oriented leader of process improvement initiatives, system deployments, and organizational development



MEET YOUR CUSTOMER CARE TEAM

Implementation is a big hurdle to clear, but your journey with your new software is just beginning. Your dedicated account manager is focused on your ongoing success and can help you adapt your software as your needs change over time. And our support team is always available to answer questions and help solve problems.



PAULA QUILES, CUSTOMER EXPERIENCE MANAGER

Credentials: Former Customer Experience Manager, Business Process Manager, and Technical Support Manager; degrees in Specialized Technology and Business Process Management



MICHAEL RETTEW, CUSTOMER SUCCESS MANAGER

Credentials: Key Account Technology Advisor, Marco Technologies; Key Account Manager, Phillips Office Solutions



LYNETTE JOHNSON, ACCOUNT MANAGER

Credentials: Account Manager, Clark Associates; Product Manager of Victor Brand, Woodstream Corporation



TIM CROUSER, ACCOUNT MANAGER

Credentials: Former business owner; decades of experience in software sales; degree in Business Administration



TONY HARING, ACCOUNT MANAGER

Credentials: Customer Experience Manager, Steer EV; Sales Development Representative, Quartile



CHRIS TORRES, ACCOUNT MANAGER

Credentials: Senior Account Executive - Sales Team Lead at Fastsigns Lancaster; Analytical Chemist - Eurofins Lancaster Laboratories



DELPHINE BUTCHER, CUSTOMER SUPPORT CONSULTANT

Credentials: Held a variety of positions across industries, all focused on customer service



HOW TO GET SUPPORT

Phone: 1.888.204.0101

Web: support.cargas.com

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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