



### Newfront

Newfront is a modern insurance brokerage that leverages technology to vastly simplify the buying process for clients and the selling process for brokers. Their experienced insurance brokers help our clients save money and find the right coverage for their risk. Newfront is one of the fastest-growing retail insurance brokerages in the US.

### DEMOGRAPHICS

- **INDUSTRY** | FINANCIAL SERVICES
- **HEADQUARTERS** | SAN FRANCISCO, CA
- **FOUNDED** | 2017
- **EMPLOYEES** | 700+
- **EXISTING ERP** | VERTAFORE AMS360
- **OTHER SYSTEMS** | ACCOUNTING SEED, BILL.COM, CONCUR, MS EXCEL, VENA, ADP, CITY NATIONAL BANK, SVB, DASH, BIGQUERY

### SALES TEAM

- **NETSUITE** | N/A
- **CARAVEL** | SCOTT CURRY, CAILA COHEN

### NETSUITE SOLUTION

- **NETSUITE** | SUITESUCCESS FINANCIALS 1<sup>st</sup> PRM
- **MODULES** | FINANCIALS, RECORD TO REPORT, AP INVOICE TO PAY, AR INVOICE TO CASH
- **INTERFACES** | BANKING, ADP, OCR, CONCUR, VENA, BIGQUERY, STRIPE

### IMPLEMENTATION

- **TIMELINE** | PHASE 1 = 5 MONTHS, PHASE 2 = 3 MONTHS
- **METHODOLOGY** | SUITESUCCESS + OPTIMIZATION
- **APPROACH** | NEWFRONT WILL DEPLOY NETSUITE IN A MULTI-PHASE WITH CORE FUNCTIONALITY GOING LIVE IN MONTH 5 AND INTEGRATING TO VARIOUS 3RD PARTY SYSTEMS IN PHASE 1 AND 2.