



# Industry: Financial Services

## Crumdale Specialty, LLC



Crumdale Specialty is a diversified insurance firm providing custom, self-funded healthcare solutions to a bespoke set of brokers, consultants, and agents nationwide. Ranked on the Inc. 5000 Fastest Growing Companies and Best Workplaces, we leverage industry expertise, superior talent, data analytics, and a disruptive mindset to manufacture, underwrite, and administer agile, transparent, and cost-saving solutions. We optimize the fragmented health benefits supply chain to reduce health benefit costs and create better outcomes for employers and employees. Our company culture is rooted in alignment, innovation, and integrity. We believe when our clients win, we win. We become part of your team, so you can do what you do best.

**HQ:** Paoli, PA **Founded:** 2014 **Employees:** 150+

**Existing ERP:** QuickBooks

**Other systems:** Salesforce, Concur, Paylocity, Proprietary Policy Management System

**Customer Challenges:** Reporting and AR Management

**Deal Competitors:** Microsoft, Intacct

**Why we Won:** Due to our overall experience in the insurance space and ease of integration and reporting in NetSuite.

### Caravel teams:

Corey Ruane  
David Tillotson

## NetSuite Implementation

### NetSuite sales team:

Max Jacobs  
Bryan Daley  
Marta Thordarson

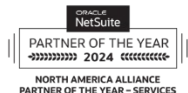
**NetSuite:** Financials First

**Methodology:** SuiteSuccess + Optimization

**Modules:** Financials, AP, AR, NSPB

**Interfaces:** Banking, UKG, Policy Management, Salesforce, Concur

**Approach:** Crumdale will deploy NetSuite in a single phase with all functionality in ERP and EPM going live in 5 months and integrating with various 3rd party applications.



### CONTACT US:

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