



Industry: Financial Services

Bridger Insurance Services

**Bridger Insurance**

Bridger Insurance Services is an innovative auto insurance company based in Pleasanton, CA, founded in 2017 but building on a legacy dating back to 1974. The company emphasizes digital technology in its business model, offering a mobile app for self-service and maintaining a network of over 1,500 broker locations. With 51-200 employees, Bridger specializes in property casualty insurance and provides various auto coverage options with benefits and discounts to ensure affordability for their customers.

HQ: Pleasanton, CA **Founded:** 2017 **Employees:** 63

Existing ERP: QuickBooks

Other systems: Snapshots, Informs, Socotra, Amazon RA3, PowerBI, One Inc, Trinet, California Bank of Commerce

Customer Challenges: Leveraging multiple systems that didn't integrate well, Challenging to consolidate 10 entities, reporting and tracking audit trail was very manual and tedious

Deal Competitors: N/A

Why we Won: Because of value driven demos, comfort around and holding in implementation methodology and meeting price expectations.

Caravel teams:

Andrew Mathews, Erica Kyriakides

NetSuite Implementation

NetSuite sales team:

Kierstyn Yardley, Madison Applegate, Caleb Ward

NetSuite: Financials First

Methodology: SuiteSuccess + Optimization

Modules: Record to Report, Procure to Pay, Shared Vendor Bill BPM Suite Bundle

Interfaces: Banking, Credit Cards, Trinet, Informs & Socotra, Snapshots

Approach: Bridger Insurance will deploy NetSuite in a single phase with core functionality going live in 4 months & integrating to various 3rd party systems in phase one.