

**CARAVEL**

BPM Technology Solutions

CUSTOMER PROFILE

Industry: Financial Services

The Cason Group



The Cason Group provides sales support and service to insurance agents throughout the Southeast. Founded in 1991, we represent over 20 carriers and our staff of over 150 employees is available to assist agents in finding the best coverage for their clients.

HQ: Columbia, SC **Founded:** 1991 **Employees:** <200

Existing ERP: QuickBooks

Other systems: Salesforce, Ramp, Paylocity, Excel, Banking

Customer Challenges: Intercompany & Consolidation, Revenue Management

Deal Competitors: Intacct, NSPS, ScaleNorth

Why we Won: We won with our expertise in Insurance and by offering multiple delivery options - full process optimization or a leading practice phased approach

Caravel teams: Frank Herr, Jake Waters

NetSuite Implementation

NetSuite sales team: Stephen Troio

NetSuite: Financials First

Methodology: SuiteSuccess

Modules: Record to Report, Procure to Pay

Interfaces: Banking, Ramp, Salesforce, iPipeline

Approach: The Cason group will deploy NetSuite in a multi-phase going live in month three. Phase one will include core financials and csv imports with third parties before exploring NSAW + BPM Caravel's NSAW accounting hub feature in phase two to help summarize policy details.

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