

**CARAVEL**

BPM Technology Solutions

# Customer **PROFILE**

## Cabrillo Coastal



Cabrillo Coastal General Insurance Agency, LLC specializes in residential property insurance for hurricane-exposed areas. Through sophisticated pricing techniques, quality and timely claims handling, careful reinsurance pricing, experienced underwriting and a friendly staff, they provide the quality service and competitive pricing their customers deserve.

### Demographics

**INDUSTRY** Financial Services**HEADQUARTERS** Gainesville, FL**FOUNDED** 2010**EMPLOYEES** 93**EXISTING ERP** Great Plains**OTHER SYSTEMS** Concur, Paylocity,  
Mid Florida Bank, Proprietary Insurance  
Platform

### Sales Teams

**NETSUITE** Nate Foggy, John Meadows**CARAVEL** Corey Ruane, David Tillotson

### NetSuite Solution

**NETSUITE** Financials First**MODULES** Financials, Record to Report,  
Procure to Pay**INTERFACES** Payroll, AvidXchange, Policy  
Management Platform

### Implementation

**TIMELINE** 4 months**METHODOLOGY** SuiteSuccess + Optimization**APPROACH** Cabrillo Coastal will deploy NetSuite  
in a single phase with core functionality going live  
in month 4 and integrating to various 3rd party  
systems in phase one.

### CONTACT US

info@caravel-partners.com | 714-253-4455 | www.caravel-partners.com