



**ASSOCIATED SERVICES
FOR THE BLIND
AND VISUALLY IMPAIRED**

Karla S. McCaney, President & Chief Executive Officer

November 26, 2018

To Whom It May Concern,

This letter is our official endorsement for NexGen Consultants, specifically Keith Watters and John Schneider as Salesforce consultants, where they assisted us with our implementation of Salesforce Sales Cloud.

We are a nonprofit, headquartered in Philadelphia, Pennsylvania, where we support individuals who are blind or visually impaired to inspire self-esteem, independence, and self-determination. Our services include educational support, life skills, training resources, as well as providing care through community action and public education.

Previously, we experienced numerous challenges and hurdles with utilizing Microsoft Access while supporting clients who are blind and/or visually impaired. The current system was not easily customizable or intuitive enough to meet the needs of our organization as we want to grow our operation with additional staff but to add more clients. More so, we were not able to access or readily run reports for measuring data and as we expand our team does not have the ability to input and effectively manage classes, groups, attendees and client services. Lastly, we needed a system which is 508 compliant where our end users and staff can utilize Salesforce with visual aids or screen readers.

NexGen and their team were able to provide the capabilities for our organization to deploy a robust system for enhancing our business development opportunities but to allow our users who are blind and/or visually impaired access the platform. More so, they provided not only the capabilities for us to manage client services, programs, and intake forms but also communications for segmenting and engaging prospects and clients.

As a result, they were able to build an efficient data model for managing clients and prospects, customized to support our processes. The NexGen team partnered with us to provide recommendations around data management, structure and workflow automation to build out an optimal platform. This led to an increase in team collaboration for expanding our operation, reporting on existing programs and provide the ability to more accurately forecast growth while centralizing client data into one spot where multiple individuals (ex. Board of Directors) can view data at a high level.

NexGen was extremely detailed, analytical and skilled in gathering requirements while understanding our needs to build an optimal solution for our organization. Above all else, they always highlighted practical applications through experience, best practices, third-party applications, standard configuration and industry recommendations as their work for our team was pivotal for operational efficiency and incremental revenue generation!

As part of our implementation, NexGen completed the following items as part of our project:

- Data Migration from Microsoft Access
- NPSP Individual Contact Configuration

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- Business Analysis and Process Reviews for Client Services
- Deployed Capabilities for Intake Forms, Annual Reviews, Programs, Attendance, Feedback & Referrals
- Report, Dashboard & Analytics Development
- End User, Report & Dashboard & Administrator Training
- Advanced Process Automation, Leveraging Visual Flow, Process Builder, Mass Action Scheduler, & Declarative Lookup Rollup Summaries

Their team has been an exceptional consulting partner and firm guiding us on our Salesforce journey to design and implement a scalable solution while driving value with our team and ensuring user adoption. Their expertise to build an efficient design, data model, best practices and technical expertise, gave us the ability to be productive and efficient as we continue to grow as an organization serving the blind and visually impaired. Overall, they were very receptive, tenured and skilled to work with and we are pleased to have NexGen as our Salesforce consulting and implementation partner.

Please accept this referral letter as a recommendation for any nonprofit, organization or business considering NexGen as a Salesforce consulting and/or implementation partner!

Respectfully,



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