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Hello Doug,

Earlier this year we wrapped up our migration from the wealth management template to the Orion overlay of Salesforce and it's been successful. My life has quickly become everything Salesforce and will continue for the foreseeable future. I have learned a ton about the software and everyday I'm surprising myself with my new knowledge. Kristen Crane is awesome. Her knowledge and her patience is top notch. I think in the beginning my lack of understanding Salesforce had me frustrated because I didn't know how things worked or even how to create new things in the system. After the actual migration occurred is when the magic started to happen for me. It's been a great exercise in re-visiting all of our clients and their relationships, understanding the software and how to use it to make things more efficient.

We were able to accomplish the following:

1. Data Migration from Salesforce's Wealth Management template of Salesforce.com to Orion's customized Salesforce.com
2. Build out a custom Opportunity object
3. Mail Chimp integration
4. Survey Monkey integration
5. User Training
6. Admin Training
7. Reports and Dashboard Training

With Kristen's help we have already created some new processes around our meeting notes that are going to help efficiencies improve tenfold in the future. Through her creation, I was able to mimic what she had done for another process in our financial planning department.

If we are asked to make a recommendation for a firm like yours to one of our peers, I would definitely have them use NexGen and Kristen. As I became more excited about things in the new org she saw that and rolled with it, creating something we hadn't even requested but are now using daily. She's been awesome throughout the whole process and I would give her a 10 (I'm always hesitant to give a full 10 but she nailed it).

Sincerely,

Robert S. Mikulski
Operations and Client Service Manager