



To NexGen:

Now that our first Salesforce project has come to a close, I want to take the time to explain why I would recommend NexGen Consultants to any company looking to implement Salesforce.

During the past few months, I worked alongside our consultant, Michaela Riestenberg, to design a CRM environment that reflects how our business operates. Michaela was articulate, patient, informative, responsive, knowledgeable, approachable, and took the time to understand our business model. It is clear that NexGen is more than just a team of consultants -- they are truly invested in making sure clients have a successful implementation to help improve their business processes.

Before we implemented Salesforce, our business was manually tracking data via spreadsheets and emails, and the need for a better system to help service our clients was apparent. NexGen representatives Doug Heilbrun and Randy Davis gave us guidance to help us gather this data and even reviewed it with us before we had even signed up for their services. This gave us a big head start as we started down the implementation path. While sales are important to us, serving our clients is our first priority. NexGen developed a project plan to get us up and running to be able to track the various types of interactions our users have with people across the country. At 'Go-Live' we had all of our data in one place thanks to the massive data migration Michaela completed for us. Since a lot of our business is done via email, an Outlook integration was needed. This daunting task was made simple by web conference and training provided by NexGen.

I have worked with several CRM systems over the years so I knew learning a new one is a major ask. Michaela was sure to train me throughout the implementation and was always willing to show me any configuration changes she had done. Once the system was fully designed, Michaela hosted various trainings for our users, system admin and even a reports and dashboard training for our "Power Users". All were helpful in making sure our Salesforce journey started off on the right foot.

I would highly recommend NexGen Consultants to anyone looking to implement Salesforce. We are already preparing to start another project with them and look forward to working with them and continuing this business partnership in the future.

With kind regards,

Terri Grogan  
Senior Consultant