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To Whom It May Concern:

This reference letter is JM Wilson's official recommendation for NexGen Consultants, specifically Randy Davis, Keith Watters, Gretchen Allnutt and Michaela Wilson as Salesforce.com & Pardot consultants where they assisted us with our implementation of Salesforce Sales Cloud, and Pardot, for 100+ users.

We are a Managing General Agency specializing in Excess and Surplus Insurance where we provide independent insurance agents access to specific markets and top rated carriers for Commercial Transportation, Property & Casualty, Brokerage, Professional Liability, Bonds, Surety and Personal Lines.

Our core business challenge was not having a scalable, robust or efficient CRM platform in place for our sales and marketing teams as we increase the number of agencies and agents we partner with. Additionally, we had a large gap, due to our operating complexities, with tracking, reporting and accessing Quote and Submission data in Lotus Notes.

The importance of the solution built by NexGen was to provide the ability for our team to measure, quantify and qualify lead and sales opportunities as we continue to grow as a business while minimizing manual processes for tracking activities (visits, calls and emails). Additionally, our team worked extensively with NexGen on building a data integration with AS/400, which houses commission and production data, to have it centralized within Salesforce.

As a result of their support, we were able to centralize and master all data, with the exception of production data, in Salesforce while pushing out specific data elements to other systems. This was a key element of our success as NexGen advised and provided solutions based on the flexibility of Salesforce as an enterprise wide solution.

Another key enhancement we received from our solution was the ability to measure the end-to-end life cycle tracking of Submissions and Policies which allows us to track close ratios and retention rates more efficiently. Lastly, this gave our team the ability to quickly, and effectively, measure the production of agents by measuring the number of new agents signed each month, submission data, number of activities completed and total amount of premium.

NexGen was extremely thorough, analytical and proficient on gathering requirements while understanding these needs to build an effective solution for our team. Most importantly, they always indicated 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, the NexGen team completed the following items as part of our engagement:

- Account/Contact Configuration (including Record Types)
- Lead & Campaign Enhancements
- Pardot Implementation
- Pipeline Analysis & Revenue Forecasting
- Email Integration (LinkPoint 360)
- Business Analysis and Process Reviews for Sales and Marketing Activities
- Opportunity Management to track Prospective Agencies, Submissions & Individual Policies
- Full Data Migration from Lotus Notes
- Implemented an in depth Data Visibility & Security Model
- Report, Dashboard & Analytics Development
- End User, Report & Dashboard & Administrator Training
- Utilized Workflow/Process Automation
- Nightly Batch Integration with AS/400 for Commission & Production Data

NexGen has been an outstanding consulting partner for leading us on our Salesforce journey to design and implement Salesforce while driving value with our team and ensuring user adoption. Their expertise to deploy 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 a business. Their team was receptive, tenured and enjoyable as we are delighted to have NexGen as our Salesforce consulting partner.

It is with great pleasure to write this referral letter to serve as a recommendation for any company considering NexGen as a Salesforce consulting and/or implementation partner!

Sincerely,



Erin Dey  
Director of Sales  
Salesforce Project Champion  
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