

mon roc ADMINISTRATORS

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To Whom It May Concern:

This reference letter is our recommendation for NexGen Consultants where Keith Watters & Janelle Hunter as Salesforce.com consultants where they assisted us with our implementation of Salesforce.

At Mon Roc Administrators, we serve as the administrator for unions and employers 401k plans on behalf of John Hancock and our core business challenge prior to working with the NexGen team was not having a scalable or an efficient CRM platform in place as our business continues to grow. The value of the solution built by NexGen for our team was to measure, quantify and qualify service opportunities but also to effectively manage renewals as we continue to expand as a business.

More so, we had limited experience deploying Salesforce and required a knowledgeable partner to provide consultation, best practices and guidance on how to effectively implement Salesforce. As a result, it improved our ability to manage activities, improved client support processes, manage our contract pipeline and easily report on the necessary opportunity metrics.

NexGen was extremely professional, diligent and analytical on gathering requirements while interpreting these requests to build an effective solution for our team. Most importantly to us, they always indicated useful applications through best practices and recommendations as their work for our organization was crucial for future revenue generation.

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

- Account/Contact Configuration (Including Multiple Record Types)
- Business and Process Reviews around Sales Activities
- Custom Object Configuration (Contracts & Union/Contract Relationships)
- Data Migration from Excel
- Report & Dashboard Development
- Basic Administration & End User Training
- Outlook Integration
- Utilized Workflow Automation & Process Builder

NexGen has been an exceptional partner in leading us on our Salesforce journey to design and implement Salesforce for driving value with our team and ensuring user adoption. Their expertise to deploy an efficient data model, best practices and technical expertise, has given us the ability to be productive and efficient as Mon Roc Administrators seeks to obtain incremental revenue.

Their team was responsive, experienced and pleasant as we are delighted to have NexGen as our Salesforce partner. Please let this referral letter serve as an endorsement for any company considering NexGen as a Salesforce partner!

Sincerely,



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