



**North Star Resource Group**  
Changing Lives, Forever®

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North Star Consultants, Inc.  
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Securities and Investments  
Investment Advisory Services  
  
Securian Financial Services, Inc.  
Variable Products and Securities  
Investment Advisory Services

December 13, 2017

To: Mr. Randy Davis  
NexGen Consultants,  
Cincinnati, Ohio

Dear Randy,

North Star Resource Group is a financial services firm committed to helping steer our clients on the path to financial security. We are a new division of that company providing health insurance options to the individual market. As a newly formed division, we knew we had to start strong and pick a CRM system that would be flexible enough to help us run our business effectively. We had worked on the Salesforce CRM platform for about 9 years in our previous role and knew we wanted to implement the same familiar CRM tool with our newly formed division. The ability to document information quickly and in an efficient manner helps us provide the best experience possible to our clients. We chose Salesforce for all of our day to day tracking, client relationship needs, and servicing. Salesforce is a very powerful tool and we knew we needed to work with a knowledgeable implementation partner for guidance and best practices.

As a new division we could not afford inefficiencies and did not want to be working out of multiple systems with inadequate tracking abilities. We worked with Doug Heilbrun who took the time to understand our needs and provide us direction. We opted for NexGen's Quickstart package and just two weeks after signing our work order, our assigned consultant Michaela Wilson had us up and running and automating our processes. She helped integrate Salesforce with Outlook, helped configure Salesforce's mobile app so we can work from our phones, created reports and dashboards for us, and she configured the Salesforce Campaign module so we could track our marketing efforts. The amount of time this saved allowed us to focus on what really matters – our clients. Michaela's quick responses and the easy to follow training she provided was a crucial part in making this project work. Now my team can focus on creating lasting business relationships like (the relationship we have developed with NexGen!) Our experience working with NexGen was outstanding, and we would recommend their services to any organization in need of professional services and consulting on a Salesforce.com implementation. We know we have a trusted partner in NexGen who can provide us the help we need as our business needs and Salesforce capabilities continue to evolve.

Thank you!

Chris Abbott  
North Star Medicare Supplement Division  
Salesforce Administrator

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