



Tonya Coon
VP of Credit Union Solutions
7701 York Ave. S., Suite 250
Edina, MN 55435
517.522.3453
tcoon@primealliancesolutions.com

August 7, 2012

Matt Mountain
NexGen Consultants
665 Balbriggan Court
Cincinnati, OH 45255

Dear Matt,

Having completed our initial project with your company, I wanted to thank you and your team for the work NexGen completed for our organization. As you know, we had an existing Salesforce.com environment with over 20 users on Enterprise Edition. In an effort to "automate" our Sales Process on our own, we added custom fields and changed page layouts. However, after just six months of working with these changes, it was obvious we needed methods to drive behavior and encourage adoption of Salesforce as our sales tool. That is when we reached out to NexGen. Your consultant, Kristen Crane, worked with our team to accomplish the following:

- Validation Rules were built to ensure our Account Executives were updating their Opportunities properly at each stage of our Sales Process
- Workflow Rules were built to automatically create tasks and send email alerts for important milestones and to encourage adoption of Salesforce
- A custom object was created to store data uploaded to Salesforce from an external source via the Data Loader tool
- Both Management and Account Executive level Salesforce reports and dashboards were created to track the Sales Process and measure its effectiveness

Kristen Crane was excellent to work with. She kept us organized and on track throughout the entire process. We utilized your two-step approach and found it very beneficial in allowing us to work through the requirements and design. The project was completed on time with our goals met.

It was a pleasure working with you and Kristen. Please feel free to share this letter with any future prospects or customers of NexGen. I would highly recommend NexGen as a Salesforce.com consultant.

Sincerely,

A handwritten signature in black ink that reads "Tonya Coon".

Tonya Coon
VP of Credit Union Solutions