



This reference letter is our official recommendation for NexGen Consultants, specifically Keith Watters, Randy Davis, Kristen Crane and Michaela Riestenberg as Salesforce consultants where they assisted us with our Sales Cloud optimization and enhancement project for 100+ users.

Prime Risk Partners, headquartered in Alpharetta, Georgia, serves as an insurance brokerage and holding company for ONI Risk Partners, Roblin Insurance and Cook Moran. Prime Risk Partners is an active acquirer of insurance agencies and currently ranks as the 37<sup>th</sup> largest brokerage firm in the United States. We specialize in commercial, personal and employee benefits insurance.

Prior to our engagement, the ONI Risk business group did not have a central and robust CRM tool for tracking leads, accounts, contacts, activities and sales opportunities. As our group had a strong focus on service and retention, a key objective for 2018 and beyond, is to focus on growth with the acquisition of new business with the goal of doubling our sales operations in five years. Other PRP business units were utilizing Salesforce and had it custom tailored to support our existing sales and marketing processes but lacked some of the key functionality that we needed.

The core objectives of our project with NexGen was to enhance our existing Salesforce environment with configuration to support targeted prospecting, activity and sales goal tracking, sales cycle management (up to the submission process) and analytics such as close ratios, referral tracking and referral success rates.

The key goals addressed and completed by NexGen were the following:

- Enriched insight into prospect interactions
- Driving/Increasing sales prospecting activities
- Enhanced identification of the prospect journey
- Providing the ability to more accurately forecast new business
- Analytics to quantify/qualify new sales business initiatives to facilitate better decision making by senior leadership
- Centralizing prospect, account, contact, activity and opportunity data into one spot where multiple lines of business can view data at a high level

The team was extremely skilled, thorough and methodical on gathering requirements while interpreting these requests to build an effective solution for our team. Additionally, their expertise in the platform coupled with insurance experience deploying Salesforce solutions, was pivotal for obtaining incremental and future revenue generation.

NexGen has been an excellent partner to engage and we feel their consultation, recommendations and best practices were key to ensuring user adoption. Overall, the NexGen team was responsive, experienced and enjoyable. We made the right choice in our decision to partner with this team.

Please let this referral letter serve as a commendation for any company considering NexGen as a Salesforce partner!

Sincerely,

A handwritten signature in black ink, appearing to read "Robert C. Smith", written over a light blue horizontal line.

Robert C. Smith  
Prime Risk Partners  
COO