

August 12, 2019

NexGen Consultants
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Matt,

NexGen and specifically Elise Pottinger did a great job at migrating us from our "older" Salesforce data model into the new FSC data model. Your Quickstart program was exactly what we needed and although we migrated a lot of data, Elise made the transition of data an easy process.

Since the data model with FSC was vastly different than our past data model, we wanted someone with the deep understanding of FSC to ensure that we were successful. Elise not only knows FSC well but she is excellent at providing best practice recommendations to ensure that we are setting us up properly for the future. When starting this project, I had real questions as to how we were going to get to where we needed to go. Elise and NexGen answered all of those questions, and the end result was a Salesforce system that was cleaner and more powerful than what we had come from, and the transition process was easier and more seamless than I imagined it could be.

Finally, Maria Kelley's knowledge of Pardot was very beneficial in helping us be setup for our marketing automation future.



Chuck Zodda
Partner, Financial Advisor