

July 25, 2019

NexGen:

Now that we have completed Phase I of our Salesforce project, I wanted to thank Cathy Bedell, John Schneider and Maria Kelley for their help in getting us up and running. Complete Service Solutions is an integrated accounting, finance, risk and information technology company that provides services to the HBH Holdings family of companies as well as other firms in the manufacturing, construction and maintenance business. HBH Holdings, headquartered in Cincinnati, owns Enerfab, WDJ Holdings, CSS and other firms.

We were running QuickBase as our CRM system however it was not widely used so we decided to move to Salesforce.com's Sales Cloud. Your team did a great job at helping us setup Salesforce so that we could better track our opportunity pipeline. We also setup a security model that limited the data visibility across all companies.

You also helped us setup Pardot so we could improve our marketing efforts and better manage our campaigns. In addition to your QuickStart, you also provided the consulting to help us get up to speed quickly.

Finally, we setup a batch integration with SAP where data could update Salesforce with key financial data by client on a nightly basis.

I would highly recommend your firm to any manufacturer that is interested in moving onto the Sales Cloud and Pardot products.

Thanks again,

A handwritten signature in blue ink that reads 'Rajesh Kapoor' with a stylized flourish at the end.

Rajesh Kapoor  
Vice President of IT