

This letter is KnowledgeWorks commendation for NexGen Consultants, specifically Matt Scholl, Heather Glenn and Michaela Riestenberg as Salesforce consultants where they partnered with our organization for the re-deployment, optimization and migration to the Lightning User Interface in Salesforce.

We are a nonprofit and national organization committed to providing every learner with meaningful personalized learning experiences that ensure success in college, career and civic life. We carry a presence in more than 30 states, develop the capabilities of educators to implement and sustain competency-based personalized learning as we partner with federal, state and district leaders to remove policy barriers that inhibit the growth of personalized learning. We engage and provide national thought leadership around the future of learning while locally StrivePartnership improves outcomes along the cradle to career continuum.

Prior to engaging NexGen, we experienced challenges with user adoption, process silos, capabilities to deploy an enterprise wide solution, cross-functional collaboration, activity management, pro-actively engaging grants and lack of appreciation for transparency in lead, contact and corporate relationships or affiliations.

The NexGen project team added immense value and gave us the capability for our organization to implement a robust system for reducing manual effort and technical debt but also providing us the opportunity to grow efficiently with the use of Salesforce. More so, they enabled a resourceful and insightful way to view and connect our ongoing interactions with the various contacts and organizations we support. With their insights and experience, this has centralized our ongoing focus to operate as one unified organization and provided us the ability to access, manage, qualify or quantify our internal and external efforts as an organization.

As a result of their expertise, they were able to design an effective data model for managing opportunities, grants and projects which is customized to support our unique processes. Their team partnered with us to provide recommendations around data management, structure and workflow automation to build a foundational model to capture business intelligence, opportunity details, relationship mapping (affiliation/hierarchy) and project time, expense and forecasting.

NexGen was exceptionally thorough, methodical and accomplished on gathering requirements while understanding these needs to build an optimal solution for our team. Also, they always emphasized practical applications through experience, best practices, third party applications, standard configuration and industry (nonprofit) recommendations as their work for our team was essential for operational effectiveness and incremental revenue generation.

As part of our optimization, the NexGen team completed the following items as part of our engagement:

- Migration from Classic to Lightning
- Opportunity Enhancement (including Record Types)
- Pipeline Analysis & Revenue Forecasting
- Deployed an in-depth Data Visibility & Security Model
- Report, Dashboard Development

- End User, Report & Dashboard & Administrator Training
- Utilized Workflow, Process Automation & Process Builder

The NexGen team has been an exceptional consulting partner and firm guiding us on our Salesforce journey to design and implement a scalable solution while driving added value with our team and developing user adoption.

Their proficiency to build an efficient design, optimize our data model and recommend best practices combined with their technical expertise, gave us the ability to be productive and efficient as we continue to grow as an organization! Overall, they were very receptive, tenured and skilled to work with and we are pleased to have NexGen as our Salesforce consulting and implementation partner as we plan on continuing to work with their firm with future phased projects.

Please accept this referral letter as a recommendation for any nonprofit or business considering NexGen as a Salesforce consulting and/or implementation partner!

Sincerely,



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