



ROUNDSTONE
TURNING RISK INTO RESULTS

This reference letter is our official recommendation for NexGen Consultants as Salesforce and Pardot consultants. NexGen assisted our business with the implementation of Pardot and with enhancements to our Salesforce Sales Cloud environment.

Roundstone Management, headquartered in Lakewood, Ohio, is a multi-faceted insurance organization engaged in developing, underwriting and servicing alternative insurance programs and products. Based on each specific opportunity, we will work directly with brokers and their end clients (employers) as part of our solution offering.

The business challenges we encountered prior to purchasing Pardot and partnering with NexGen was utilizing MailChimp for email marketing. We ran into limitations around the integration capabilities, the ability to pull complex reports and analytics and the restrictions on what we could automate between the two systems. This was limiting our ability to drive and increase efficiencies around our marketing capabilities and effectiveness.

NexGen was extremely skilled, attentive and analytical on gathering requirements while interpreting these requests to build an effective solution for our team. Most importantly, they always indicated and applied proven solutions through best practices and recommendations, and their work for our team was pivotal for future revenue generation.

With NexGen's support, Roundstone was able to scale and ramp up our marketing efforts, measure our data more effectively, obtain more leads and opportunities, increase revenue and have the ability to provide analytics to senior leadership with a 360 view of prospects and clients.

NexGen has been an outstanding partner in leading us on our journey to design and implement Pardot—driving value with our team and ensuring effectiveness. Their expertise to deploy an efficient data model, best practices and technical expertise, has given us the ability to be productive and efficient as we seek to obtain incremental revenue. Their team was responsive, experienced and pleasant as we are delighted to have NexGen as our Salesforce and Pardot implementation partner.

Please let this referral letter serve as an endorsement for any business considering NexGen as a Salesforce and Pardot partner!

Respectfully,

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