



12/1/18

This referral letter is our commendation for NexGen Consultants where Keith Watters, Maria Kelley and Chad Shaffer assisted us with our Salesforce project. Their team coordinated and managed a rapid implementation of Salesforces' Higher Education Data Architecture (HEDA) environment for our team.

The University of Mississippi, also known as Ole Miss, is a public research university located in Oxford, Mississippi. Across all of our campuses, the university comprises of roughly 24,000 students and it is one of the 33 colleges and universities participating in the National Sea Grant Program and a participant in the National Space Grant College and Fellowship Program as well.

As part of the growth at the university, the Division of Outreach was tasked for tracking the admission and major selection process for undeclared freshmen. This included keeping track of orientation attended, housing assignments, etc. as well as a series of communications to prospective and incoming new students. Prior to engaging Salesforce and NexGen, we did not have a central repository in place to track and report on the metrics for this constituent group and required a robust and scalable solution moving forward.

As a result, it is my pleasure to recommend the support of NexGen Consultants. We partnered with their team to build the necessary relationships in Salesforce for our datasets and for migrating account, contact and related data into Salesforce. More so, we were reliant on their expertise and knowledge to build out an efficient data model, to automate processes where applicable, and train us on bulk data loading to help reduce manual effort.

Prior to this, we had limited ability to manage activities and track incoming freshmen, and we did not have an efficient or easy way to analyze the information we were gathering. By partnering with NexGen, we've had the opportunity to grow our recruiting efforts, increase our effectiveness reaching out to our constituents and streamline our processes as we continue to add more members to our team.

This project was a critical component for us as we build out our operations and with the completion of the project, it now provides us with accurate and historical data input, standardization of a student engagement process, and more effective reporting capabilities for tracking our new student and marketing activities.

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

- Data Migration of Excel data
- Contact Configuration
- Activity Management (Tasks, Events and Email)
- Basic Chatter Rollout
- Attachments & Files (Standard Document Management)
- Business Analysis and Process Reviews for Sales and Marketing Activities
- Deployed a Data Visibility & Security Model
- Report, Dashboard Development
- End User, Report & Dashboard & Administrator Training
- Utilized Workflow, Process Automation & Process Builder

Their team took the time to listen to our needs and then translated them into a solution that addressed our unique challenges within a timely manner. Because of the success of this project, other departments at the University of Mississippi are now planning their own Salesforce build-outs. NexGen is a great implementation and consulting firm for any institution looking to maximize their use of Salesforce. We confidently recommend NexGen Consultants as a trusted and reliable partner!

Sincerely,

A handwritten signature in black ink, appearing to read 'Vanessa Cook', with a stylized flourish at the end.

Vanessa Cook
Project Manager
University of Mississippi
Outreach and Continuing Education
Marketing Department