



The Ashley Group

"A reputation you know, a commitment you can count on"

August 8, 2017

Keith Watters
NexGen Consultants
PO Box 541081
Cincinnati, OH 45254

Dear Keith,

As a health insurance broker, we were searching for the right implementation partner to make us successful with Salesforce.com. We spoke with many potential partners because we knew we did not want to do this project by ourselves. After talking with many, we selected NexGen to help us in migrating from Goldmine to Salesforce.com.

While data migration was a part of the project, we looked at this project as a way to revamp our processes and streamline much of what we do. With Matt Mountain's help, we did the following:

- Built some very extensive workflow processes for onboarding and renewals
- Automated the creation of renewal opportunities for our annual plans
- Implemented a design to easily see the performance of our carriers
- Provided customized end user training by group

NexGen did a great job with our implementation and the guidance, leadership and best practices that you provided were invaluable. I would highly recommend your organization as you exceeded our expectations and we look forward to a long-term partnership with you.

Sincerely,

Stephanie Oblander
Manager of Agency Development

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