



Matt Mountain
President
NexGen Consultants

February 10, 2017

Dear Matt:

As you know, in 2016 we successfully completed the implementation and conversion project to Salesforce.com. I would like to commend the work that was done by Doug Heilbrun and Justin Davis. Justin Davis should be given the 'golden consulting award' for his flexibility working with me. Throughout the project, I regularly missed deadlines. Justin always helped get me back on track and 'got it done.'

Our project consisted of the following:

- Activity Management - Training the team on this enabled both our sales team and our sales support group to be ready to go on April 1.
- Accounts /Contacts Tabs – While I had an idea of what we needed, Justin was able make additional recommendations. I appreciate working with professionals that 'think ahead' for me rather than just doing what I ask.
- Opportunity Tab to track Sales Pipeline – Our opportunity structure required the creation of formulas for bucketing revenue in specific ways for every proposal. Justin did this almost as fast as I could describe it. I was also trained so I could do it myself – and have done so regularly thanks to Justin's help.
- Revenue Quota for Sales Reps – I stretched the limits here in that I needed three separate quotas – proposals, sold plans and first year revenue on sold plans. Justin had to do some extra research to develop a solution. This was a KEY deliverable that we had to adapt during the project.
- One-Time Data Migration of Ebix SmartOffice – Justin's mastery of taking the data we had and morphing it to the Salesforce.com requirements was critical.
- Training – Justin gave me what I needed to be efficient from the start. Managing 13 sales people and a proposal and implementation group require that I be able to hit the ground running and Justin made that happen. This, in spite of my unwitting effort to undermine his progress by not responding timely, missing calls and being what you might call a difficult customer in that way.
- Reports and Dashboards to measure proposals generated, and activities logged for each of the named Salesforce.com users.

I realize this is what your firm does and that on some level you 'just did what the contract said.' But I can assure you that delivery was of the highest order I could have asked and I cannot say enough about... so I may as well stop there. **Fantastic!!**

Thank you to your entire team with my best wishes for continuing success,

Sincerely,

Lance Kesterson
VP, National Sales & Consulting
United Retirement Plan Consultants