

DERBY & COMPANY

INVESTMENT AND RETIREMENT COUNSELORS

December 14, 2017

Randy Davis
NexGen Consultants
P.O. box 541081
Cincinnati, Ohio 45254

Dear Randy,

I just wanted to share the standard Compliments, Comments and Complaints regarding our recent conversion from ACT! to Salesforce and integration with Orion.

Compliments: Doug Heilbrun was our lead contact and Elise Pottinger was our technical contact. You have two “keepers.” Both were extremely courteous, responsive, knowledgeable, and nice. It was a pleasure to work with them. They both were available all the time, not just 9-5, which is really appreciated when going through a conversion. I set a deadline and they met the deadline. That is important to note. As I have already contracted with NexGen to further help me with my Salesforce needs, there is no higher praise I can offer.

Comments: No doubt about it, converting from Act! to Salesforce was a lot more work than we thought it would be. Not more than Doug and Elise cautioned, but more than we thought. NexGen was instrumental in helping us migrate our data from Act! to Salesforce allowing us to have our client’s financial account information be pulled in from Orion. Elise took much of the “sting” out of this complex conversion by her can-do attitude and her ability to problem solve. What made the project more challenging was deciding to implement Orion at the same time. Our lack of understanding of how Salesforce works, how Orion works, and how they integrate created an additional hurdle for Elise to address. She helped us stay the course despite the complexity of the project. In addition, she consulted on our Microsoft Outlook integration, on how to select and utilize a third-party mail merge application and helped configure an automated backup solution for our data.

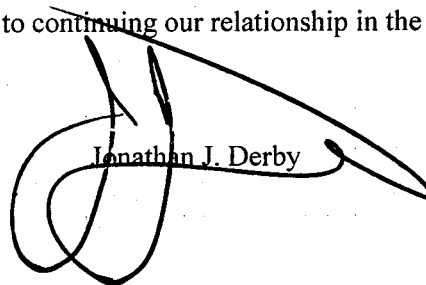
If I had one suggestion to future Act! “converters,” it would be to spend some time with Salesforce to better understand that Act! focusses on contacts while Salesforce focuses on Accounts that have direct and related contacts. Also, spend more time with NexGen on the planning and skip short deadlines!

Bottom line: NexGen did what we asked and on time, and that is why I am happy to endorse them.

Complaints: None!

Thanks very much to NexGen. We look forward to continuing our relationship in the years to come.

JJD:lrs



Jonathan J. Derby