

CX Success Subscription

How to Get Your CRM Right – Without Starting Over

What We are Hearing

Our IT team can't keep up with the business asks.



Covid has changed our Customer Expectations

Our Sales team says every call is a **do over** and CRM is not helping.

We need to best leverage the new **changing features** in CRM



The Business keeps asking for **more fields** on our forms



We are losing credibility with the business because of our CRM

Our internal resources are stretched thin

Why is everything a **change order** for our partner?

Our CRM Partner only is focused on **BIG projects**



CRM Market Dynamics

You Are Not Alone



Customer Experience is Critical

89% of Companies expect customer experience to be their **key differentiator** today



Companies are Buying Lots of CRM

Companies are **investing in CRM** to help Their Employees Get Closer to their Customers



They Are Struggling with it

Companies are only satisfied with their CRM implementations **50% of the time**

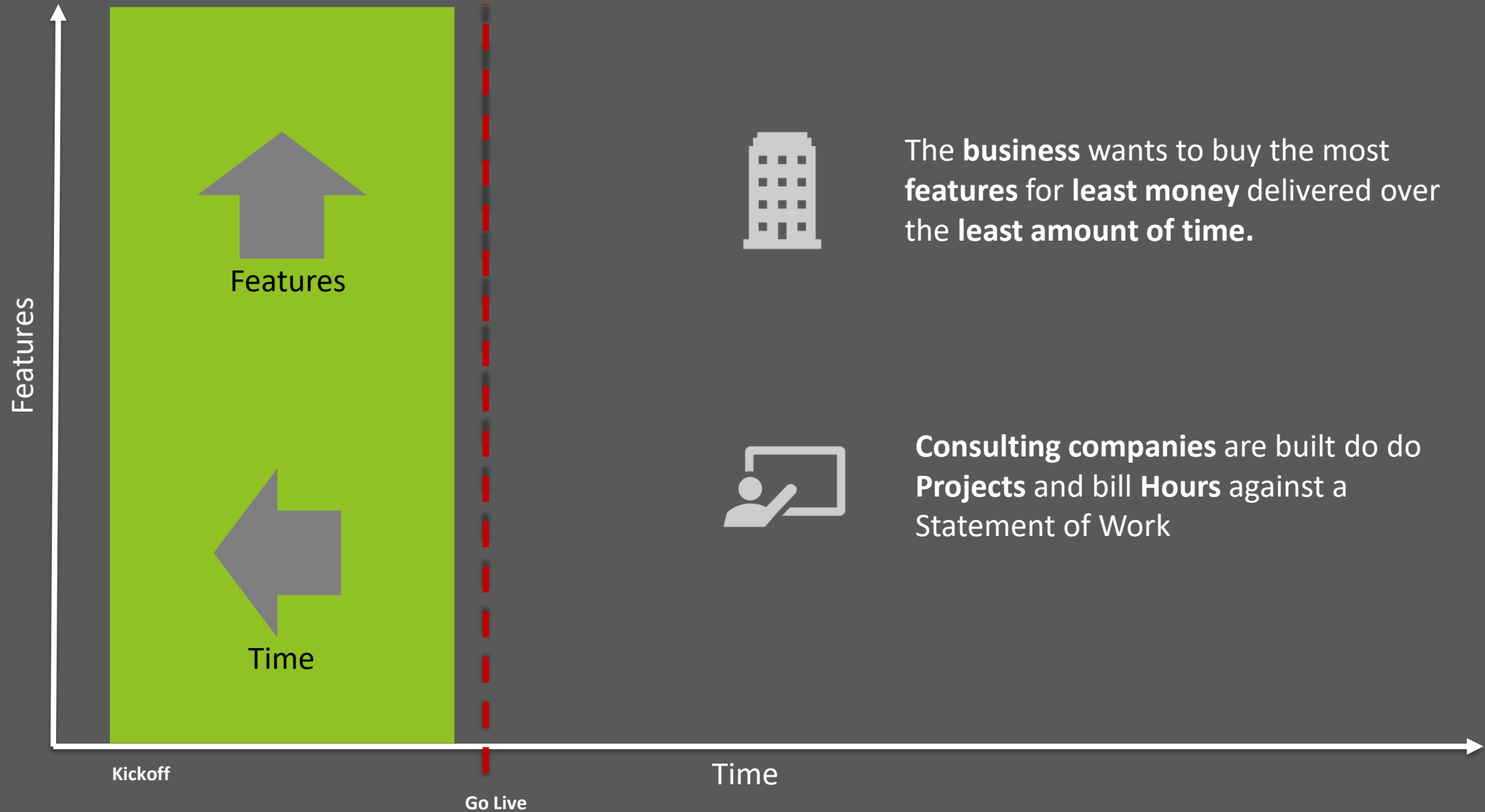


Why?

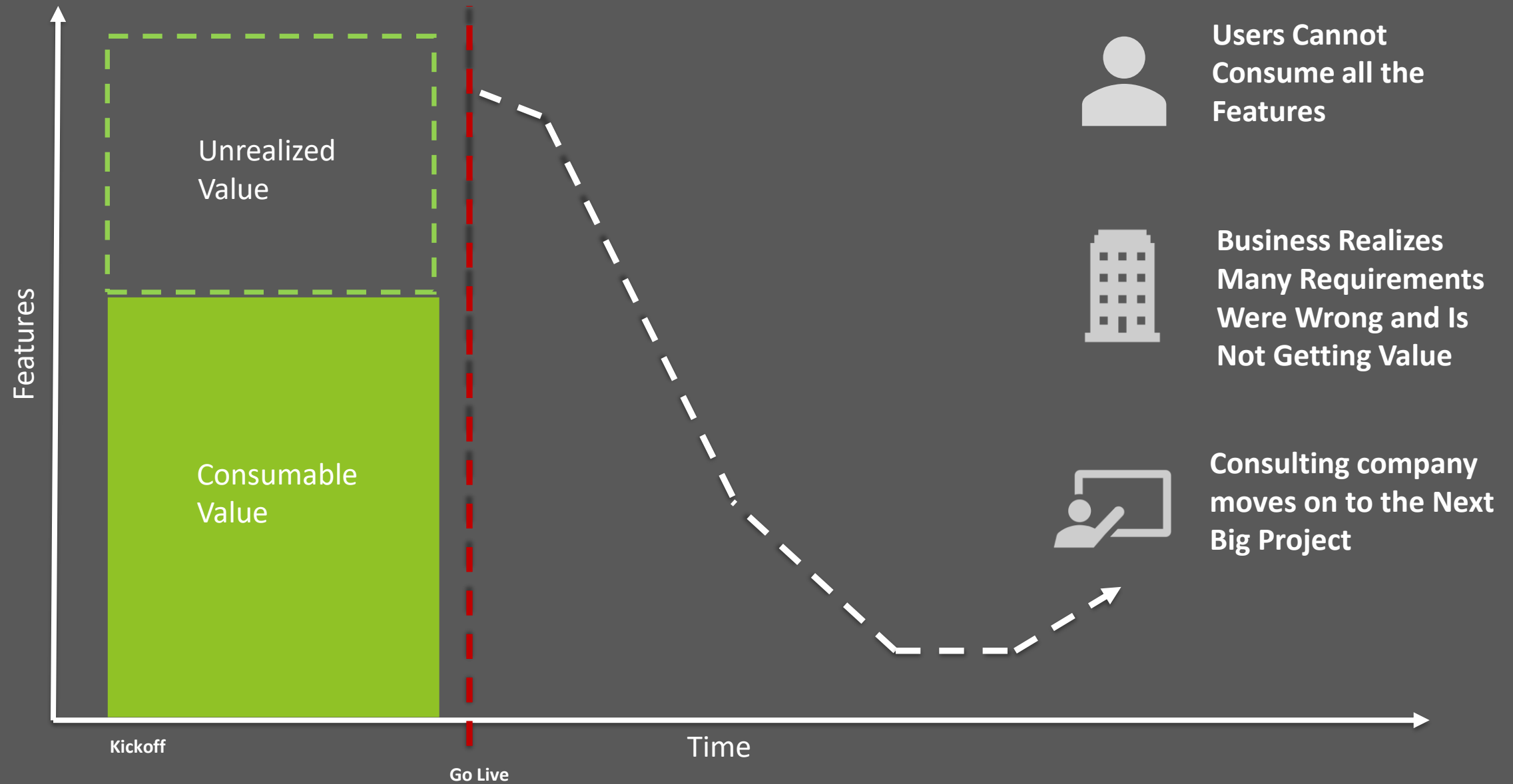
The Way We **Consume Tech**
The Way CRM is Implemented



20-Year-Old Way to Implement CRM...

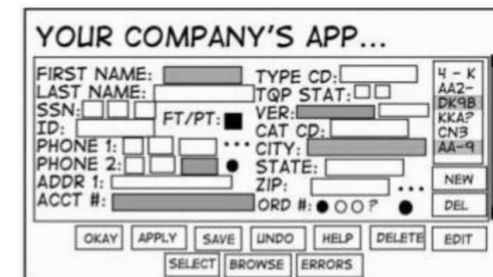
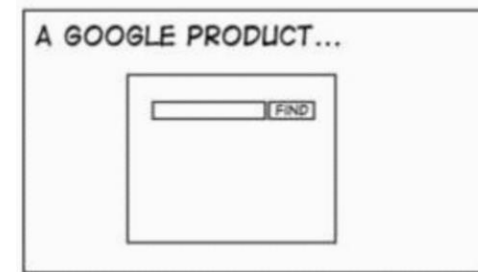
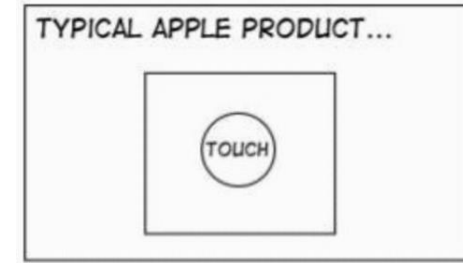


20-Year-Old Way to Implement CRM...



The Way We Consume Information

Innovation is Now Outside In | Not Inside Out



Insanity:

doing the same thing
over and over again
and expecting
different results

-Albert Einstein

Who is CongruentX

What Makes Us Different?

congruentX is a different kind of consulting firm. We help companies get value from their CRM investments. We do this by focusing on

- **Clients** not **projects**
- **People** not **resources**
- **Outcomes** not **hours**

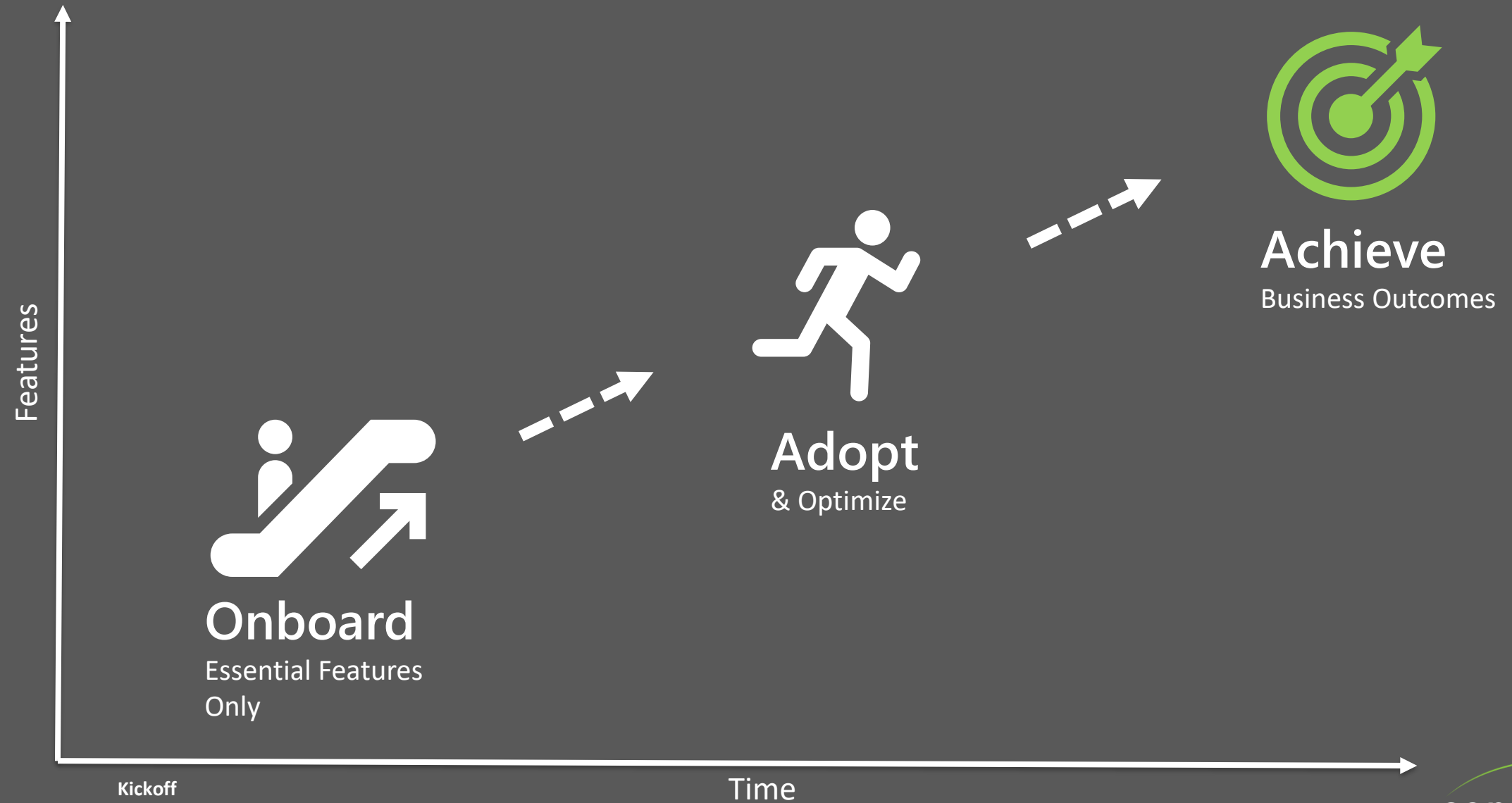
Our team – has run the largest practices in the industry, worked with the most complex solutions, and includes Microsoft MVPs, plus Microsoft Certified Trainers (MCTs).

We work through a **new consulting model** built for client **outcomes** not the consulting companies' **billable hours**



A New Way

CX Success Subscription



Kickoff

Time

A Fresh Approach

CX Success Subscription



Onboard | Optimize | Achieve

A Fresh Approach

CX Success Subscription



Advisory

Business Outcome Alignment | New Features | Architectural Advisory Board | Roadmap Strategic Planning |

Sprints

Course Corrections
Deliver Backlog

Training

What's New Webinars | Tips and Tricks Webinar | Quarterly Training Support

Monitoring

Uptime | Performance | Consumption | Adoption |

Solution Support

Unlimited Support
Service Level Agreement
Inquires

Onboarding

Get Congruent
Essential Features
Backlog



congruentX