Is Your Business Asking Questions
Your CRM Can't Answer? You Are Not Alone...

We Need to Do More with What We Have. While economic shifts have impacted internal costs and profitability – Customers are often willing to trade **loyalty** for **experience** and **availability**.

Customers accelerating needs for **experiences, insights** and **outcomes** from companies who already are resource crunched – have created **overwhelmed employees**. And one size fits all CRM is not helping.

We have all heard it – Low Code Platforms like **Power Platform** can help your users with a better more **connected**, **contextual** experience and your IT team to go faster, plus extend the life of your line of business solutions. We need to bring the **Business** and **IT together** to figure out how to **innovate** while **maximizing** our **tech investments** – now!

What We Are Hearing

We are struggling with CRM system credibility..

We are only **using** a fraction of the features we **paid** for

We want to learn how to get more from our **Power Platform Investments**

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

We are Struggling with Adoption

The Business keeps asking for **more fields** on our 365 forms for its front-line workers

Our internal resources are stretched thin

Why is everything a change order for our partner?

Our CRM Partner only is focused on BIG projects

You Are Only 30 Days Away...
Get CRM Right for Dynamics 365 Sales

congruentX
PEOPLE | TECHNOLOGY | ALIGNED

Amplify Innovation and People Experiences - using the Power Platform and AI - With Dynamics Technology You Already Own

HOW DO WE MEET THE BUSINESS GOALS WE NEED TO ACHIEVE?

HOW DO WE GET STARTED WITHOUT A BIG PROJECT?

WE HAVE TO MAXIMIZE OUR INVESTMENTS

functional   easy   enjoyable

How Do I Get Started?
Tactics | How We Do It

30 Day Get CRM Right Challenge
What to Expect
Bring IT and Business together with fast moving, interactive engagement featuring design thinking discovering **Digital Constraints**. Art of the Possible learning on the low code power platform. **Make it Real** with collaborative low code sprints.

Week 1
Align GTM with People and Tech. Create Journey Maps. Discover **digital friction** Prioritize one with 10X ROI

Week 3
Action Plan to **Onboard Adopt** and **Achieve** Outcomes with the Initial Solution.

Week 2 & 3
Rapid, iterative **sprints** to develop low code high value solution with an eye on outcomes

What You Get
Maturity Assessment High fidelity **prototype** **10X Outcomes Plan** **Backlog** for 3 others 12 Months **Roadmap**

What Clients are Saying about the 30 Day Get CRM Right Challenge

SRB CAPITAL

We changed our focus when we changed partners. We changed our focus from our project to our users and business outcomes and we went from processing 20 applications a week to 30 a day.

Rob
COO, SRB Capital LLC

RealNex
Real Power. Real Value. Real Simple.

"We were literally going to junk our system and start over, Then we realized – it wasn't the software – it was the way it was implemented" "Big Project then gone" We are getting 10X the value we used to get from other System Integrators"

Mark
CEO, RealNex