

Why National Advisors Trust. Made congruentX Their Partner of Choice

Keep up with CRM Innovation

Highlights of Customer Challenge

- Outdated Systems Running
- Supporting service and support challenges
- Building a roadmap for CRM success

Solution Highlights

- Subscription-based support
- On-demand technical guidance
- Extending Functionality and effectiveness of CRM



Client Details

- National Advisors Trust is an independent trust and custody provider
- Headquartered Kansas City, MO
- Serves clients across the United States

National Advisors Trust is an independent trust and custody provider that was founded in 2001 as the nation's first independently owned national trust company. The company offers a range of trust and custodial services, including personal trusts, charitable trusts, institutional trust and retirement services, and unique asset services. National Advisors Trust is committed to providing quality trust solutions while enriching lifelong relationships with their trusted advisors and the clients they serve. National Advisors Trust has a team of experts who have led the company to become one of America's leading independent trust and custody providers.

The Business Challenge

National Advisors Trust is a financial services company that needed to upgrade its CRM system. Denny Butler, the IT portfolio specialist tasked with supporting the company's pipeline development efforts, had to find a way to get their outdated systems running. Denny came into the organization about 2 1/2 years ago and realized quickly that their version of CRM that was out of support on a server that was out of support, putting the organization at high risk of losing their CRM environment. Denny contacted the Microsoft Dynamics User Group for recommendations and was introduced to congruentX .



An important factor in getting CRM right, specifically for NAT was addressing our current state while keeping them functional and operational.

“Many companies want to come in, do a lengthy and expensive evaluation, do a statement of work, and then you get a CRM,” says Denny. “Then after that they expect you to ‘go forth and conquer’ with no guidance. I have done that too many times before and it doesn’t work. It just ends up becoming a money pit”

The Results

CRM & IT Solutions for Aligning Sales, Marketing and Business Growth

CongruentX helped National Trust Advisors to achieve its goals by:

01

Serving as a trusted advisor & partner

congruentX has been a trusted partner throughout the implementation of CRM and systems changes that improve adoption

02

Supporting CRM

congruentX serves in multiple roles to augment the IT team and ensure there are no interruptions to business-critical processes.

03

Providing leverage through the Subscription model

The CxPulse subscription model.

NAT describes the relationship with congruentX “a God-sent.” They can rely on a partner to outsource their support and have peace of mind that experts are keeping the system current and addressing administrative challenges. The company continues to adopt new functionality like case management and implementation of email templates regularly in partnership with congruentX.

“We started with an initial delivery of a base product that would get us up and running, followed by continued support and development that would keep us iteratively growing the product and adopting it”.

Best Practices Used

congruentX employed the following best practices when working with National Trust Advisors:

01

Provided expertise in the use and management of its CRM system

02

Solved problems and reduced complexities in the system

03

Supported transition of CRM systems and implementation of projects

04

Implemented a subscription model to augment internal teams

05

Improved the client platform to drive and improve user adoption

We help companies align marketing, sales, and service with IT for better business results. Our goal is to Get CRM Right so our clients can better serve their customers. We do this by focusing on people not resources, clients not just projects and outcomes not hours.

Connect Today