# Case Study

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# Why OneDigital Health and Benefits outsourced its CRM services to CongruentX

How partnering with a CRM consultant helped
the firm to improve user adoption

## Highlights of Customer Challenge

- Moving CRM data and services from on premises to the cloud

- Needed help with solving issues after going live with online CRM

- Required a partner who would listen and understand business' unique needs, as well as provide best practices

## Solution Highlights

- Provide expertise on integrating and managing CRM

- Understand and solve CRM-related issues

- Listen and collaborate in providing solutions that fit client's unique needs

- Implement subscription model to augment teams

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## Client Details

- Employer benefits consulting and technology solutions

- 2,400 advisors

- More than 85,000 clients across the country

- Committed to technology and innovation

Originally founded in 2000 as Digital Insurance LLC, OneDigital Health and Benefits provides strategic advisory consulting and technology-forward solutions. It advises employers on employee benefits, wellbeing, pharmacy consulting, and property and casualty solutions. It also offers retirement and wealth management services through OneDigital Investment Advisors.

# The Business Challenge

In the last few years, OneDigital has grown beyond being a health insurance broker. It has expanded into adjacent verticals, including retirement planning, product casualty, HR consulting, and financial services. The firm has used data and insights from its existing product and service lines to target other markets, products, and services. OneDigital has driven its industry-leading business both organically and through the acquisition of entrepreneurial companies.

The infusion of entrepreneurial thinking in acquired offices has created a culture of looking for new ways of doing things, such as implementing new sales strategies and identifying new sources of data. Kenith Threatte, OneDigital's Director of Enterprise Applications, felt the company was ahead of the curve in identifying product insights and market demand, thanks to its frontline sales staff. However, they needed help with automating their sales processes and data collection, which were essential for supporting product and market development.

> Our sales processes and data collection efforts are a work in progress," said Threatte. "Our salespeople and consultants are leading the way on product insights and market demand. We needed the support systems, including sales processes and data collection, to catch up to where they were."

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## CRM expertise and domain knowledge

OneDigital first started working with CongruentX in mid-2020, meeting them through their Microsoft partnership. They contracted with CongruentX to help manage the post-go-live phase in migrating their Dynamics CRM from on-premises to online.

Threatte and his team had many years of experience with the Dynamics CRM, and he had a solid understanding of the system. However, he had to manage numerous stakeholders with different ideas on how the business should work. Threatte was impressed by the acumen of the CongruentX team, as well as their ability and willingness to listen, collaborate, and address the firm's unique needs. He appreciated the benefit of their insights and best practices, but also how they were able to listen and articulate what the business needed.

> "We formed a truly symbiotic relationship with CongruentX, which will definitely help us to grow," said Threatte. "Just from talking to them briefly, I could tell they knew what they were talking about. In addition to having the required knowledge, there's the relational aspect, as they're willing to work with us to help us become what we want to be."

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# The Results

## Access to CRM expertise and teams

CongruentX helped OneDigital to achieve its goals by:

### 01

**Delivering unique expertise in CRM**

CongruentX provided significant technical expertise that OneDigital did not have within its organization. They also developed domain knowledge and an understanding of their client's business, which helped them be more effective and efficient.

### 02

**Supporting CRM transition**

CongruentX helped OneDigital to transition its largest office, which was working on a customized CRM, to its corporate-wide Dynamics CRM platform. The transition went smoother than expected and received praise from all stakeholders.

### 03

**Providing leverage through the subscription model**

CongruentX augmented OneDigital's internal teams and domain knowledge with its people. This helped the company with quicker implementation of projects.

"Being able to leverage CongruentX's people has given us a great lift when we have needed it the most," said Threatte. "I wholeheartedly consider them part of my team, and they are embedded within my organization. They have more domain knowledge than some people within the firm."

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# Best Practices Used

 CongruentX employed the following best practices when working with OneDigital:

### 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**

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