

Why Toastmasters International partnered with congruentX to implement a new integrated system for their call center.

How partnering with a CRM consultant helped the Toastmaster's International build a more efficient call center CRM with better data to more effectively serve their members.

Highlights of Customer Challenge

- Integrate the four or five disparate systems for the call center team
- Need help improving the customer service team's efficiency due to lack of integration causing the team to struggle to meet their SLA's
- Require a partner who will quickly and efficiently deliver an integrated system to get their new call center up and running before their busy season

Solution Highlights

- Provide knowledge and expertise on integrating and using Omnichannel for Customer Service
- Get business, IT, and marketing leadership involved at every stage
- Listen to and collaborate on solutions that fit the client's needs
- Roll out the solutions in a systematic three-phase process to ensure success of the implementation and improve user adoption rates



Client Details

- Nonprofit that teaches public speaking skills through a worldwide network of clubs
- 4,200 clubs in 148 countries
- Over 270,000 global members
- Over 100 years in business and counting

Toastmaster's International is a global nonprofit educational company with a presence in almost every city worldwide. With over 270,000 members across the globe, they focus on providing clubs where individuals can join to practice their public speaking and leadership skills. They also offer educational pathways and programs that individuals can purchase, allowing them to progress at their own pace.

The Business Challenge

Before implementing Microsoft Omnichannel, the team faced significant challenges with their call center contact. They had a different platform for every channel: one for chat, one for voice, one for email, and another for internal case creations and similar tasks. Essentially, there were four or five disparate systems, none of which were interconnected. This lack of integration created inefficiencies for their customer service team, as they had to navigate multiple platforms, leading to a disjointed and messy process.

About a year and a half ago, Jen Mahon, Senior Manager of Operations at Toastmaster's International, embarked on a journey to find a unified solution. After thorough evaluation, her team decided on Microsoft Omnichannel. However, they needed an implementation partner to help them integrate this new system seamlessly.



“This is where congruentX came into the picture. They provided the expertise we required to implement the solution effectively,” said Jen Mahon, Senior Manager of Operations at Toastmaster’s International

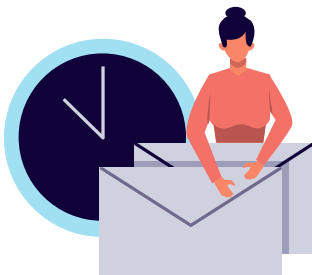
CongruentX: CRM expertise and improved communications

Toastmasters International first started working with congruentX on this implementation in December 2023. They partnered with congruentX after meeting them through a trusted referral. CongruentX took the time to understand their business and how everything worked before diving into the complex coding needed to deliver their solution.

The solution was to leverage their current Dynamics CRM for Customer Service through Omnichannel. By using Microsoft Teams to route calls to Omnichannel and an Omnichannel chatbot, everything was now living directly in the CRM eliminating the need to manually input data. This saved the employees time since they no longer had to “do CRM” and improved the CRM data quality and reliability. The agents are much happier having all their voice calls, chats, and history in one place and with the improved ease of connecting cases to conversations.



“Everyone was great to work with. The build was done perfectly. We didn't have any issues when it rolled out,” Mahon said. “Anytime we needed something, someone from the team had the knowledge and expertise to get it done. We had a very short timeline, and everyone from congruentX worked hard to make sure we finished on time”



The Results

Improved Productivity and Customer Service

CongruentX helped Toastmaster's International to achieve its goals by:

01

Providing unique expertise in CRM

CongruentX provided significant technical expertise that Toastmaster's International needed to implement the new system on the tight timeline.

They demonstrated an understanding of the business drivers and a willingness to listen to their concerns, focusing on the end goal of user adoption.

02

Supporting CRM integration

CongruentX helped Toastmaster's International integrate their CRM system in their new call center, ensuring the customer service team had everything they needed at their fingertips. Through a three-phase roll-out, congruentX ensured a streamlined transition when it was go live time.

03

Leveraged AI to enhance service

During this project, congruentX leveraged AI to help scan knowledge base articles that were stored in the Dynamics CRM and their website to answer questions through self-help for members and prospective members. This sped up the amount of support members could receive while allowing for an agent request if more assistance was needed.

“It's hard to find a good partner who truly understands Microsoft products,” Mahon said. “CongruentX doesn't just focus on one aspect; they understand the other platforms we have and how they all interconnect. I felt like the team wasn't just coming in and doing the high-level things. They got into the weeds and really understood our business so they could implement this new platform effectively.”

Best Practices Used

CongruentX employed the following best practices when working with Toastmaster's International:

01

Provided expertise in the use and management of the CRM

02

Supported transition of CRM systems and implementation of projects

03

Ensured consistent communications and understanding of issues

04

Built a queue to improve efficiency and effectiveness of client service team

05

Leveraged scheduling and automation to Improve customer service

06

Leveraged scheduling and automation to Improve customer service

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