

Why U.S. LUMBER outsourced its CRM services to congruentX

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

Highlights of Customer Challenge

- Improve CRM adoption following migration from Salesforce to Dynamics
- Lacking a common language and common view of their customers
- Required an experienced and flexible partner to build an effective CRM for the long term

Solution Highlights

- Provide knowledge and expertise in integrating and managing CRM
- Get leadership involvement at all stages
- Listen and collaborate in providing solutions that fit the client's needs
- Implement partnership and subscription model



Client Details

- Privately held distributor of specialty building materials
- Serves more than 15,000 customer locations
- Over 4,000 employees
- Growing organically and through the acquisition

Lawrence Newton founded U.S. LUMBER in 1988, starting with one location in Birmingham, Alabama. More than 30 years later, the privately-held distributor of specialty building materials supplies forest and wood-alternative products to more than 15,000 local lumber yards, building supply dealers, and home improvement retailers across the U.S. and Canada.

The Business Challenge

U.S. LUMBER has gone through significant change and growth over the last few years. Since 2021, it has purchased three building supply companies. In addition to growing its customer base, the acquisitions added a large number of employees to its human resources, with nearly 600 people expected to use its CRM software. The company also transitioned from Salesforce to Microsoft Dynamics.

The company initially partnered with another service provider to migrate its systems and data to the new CRM. However, they did not spend enough time understanding U.S. LUMBER's business, problems and challenges, use cases, and workflows. This created a relatively unusable CRM system, which negatively influenced internal adoption. U.S. LUMBER decided to resurrect the CRM product, with David Livingston, director of IT, leading the search for a new CRM partner. Their first new partnership did not work out as planned, as the service provider ended up being too rigid and prescriptive for their needs.



“The company did not take the time to understand our business, nor were they willing to adapt the scope of work to meet our users’ needs,” said Esther Fournier, Senior Manager, Company Projects, U.S. LUMBER. **“After interviewing four or five other companies, David eventually met with Chris Cagnetta, chief technology and innovation officer at congruentX. Their mindset on building a partnership, their agility in addressing our problems, and their understanding of our business drivers were big factors in choosing congruentX for this project.”**

CRM expertise and Agile approach

U.S. LUMBER signed up with congruentX in September 2021. Before jumping into coding, congruentX took the time to develop a better understanding of their business drivers. They also worked on getting ownership engagement to ensure buy-in and agreement on the direction at every step in the process.

Since the outset of the partnership, they were impressed with congruentX's knowledge and expertise with CRM. They were pleased with how congruentX took an Agile approach to project management, rather than using the Waterfall approach that other firms employed to code strictly according to the scope of work. congruentX also acts more like a partner in the arrangement, ensuring that the solutions they provide are collaboratively developed and work over the long term.

“The people at congruentX feel like partners rather than salespeople,” said Fournier. “Their partnership approach and their subscription model really make them stand apart from other companies.”



The Results

Comprehensive views of the customer

congruentX helped U.S. LUMBER to achieve its goals by:

01

Providing unique expertise in CRM

congruentX provided significant technical expertise that U.S. LUMBER did not experience with other service providers. 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

Employing an Agile approach

congruentX employed a partnership approach and involved leadership in decision-making. They demonstrated flexibility in addressing user needs by using an Agile approach to project management and completion of tasks.

03

Supporting initiatives through the subscription model

congruentX implemented its unique subscription model in supporting U.S. LUMBER with different initiatives. This has enabled it to engage in several different projects that are expected to launch shortly.

We currently have three projects on the go with another one entering the queue,” said Fournier. “Although we have yet to deploy, I am very pleased with the progress. Based on the sprint reviews and what I’ve seen from congruentX so far, I am very confident in their ability to understand what we need and deliver us the desired results.”

Best Practices Used

congruentX employed the following best practices when working with U.S. LUMBER:

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

Deployed a subscription model to provide as-needed support

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.

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