

WalletShare.AI



Is Your Business Asking Questions

Your CRM Can't Answer? You Are Not Alone...

Insurance carriers who distribute through independent agents strive to establish strong and long-term relationships with the agents, but many say **Customer Relationship Management Software** is not helping.

As a **territory manager** for an **insurance carrier**, I need to optimize the interactions I have with my agents.

I am spending almost **a day a week** in technology tools – most of which I think add no value?

Am I showing up for the meeting with valuable insights to help the agent, or am I just “touching base”?

Does the agent understand the value proposition of our products versus those from our competitors?

Does the agent have a clear understanding of our commission plan, bonus structure, and where they stand?

What We Have Learned

With traditional **CRM**, these types of insights or extremely difficult to capture. Traditional CRM systems are centered on **activity management**. In other words, CRM allows **management** to capture activities (quantity) versus content (quality). This is equivalent to a batting coach simply telling a batter to just get to the plate more, with no regard to helpful batting techniques.

CongruentX has years of experience in working specifically with insurance carriers to help them address these types of challenges with their CRM.

In addition, **CongruentX** leverages conversation intelligence to provide true intelligence into the quality of interactions, not just the quantity.

AI Fueled Solutions for – Wallet Share | Conversation Intelligence | Trip Reports and Follow Ups | Territory and Account Management | Personalized Industry and Regulatory News Triggers

You Are Only 30 Days Away...

Get CRM Right with AI Fueled Selling

Turn Tech from Friction to Fuel and Increase Wallet Share



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

Discover **digital friction constraints**. Prioritize one with 10X ROI

Week 2 & 3

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

Week 4

Action Plan to Onboard Adopt and Achieve Outcomes with the Solution

What You Get

High fidelity prototype **10X** Outcomes Plan Backlog for 3 others Future Blueprint

What Insurance Distribution Clients are Saying about the congruentX



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.”

Kenneth
One Digital Insurance



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.

Kelly
Vp Sales, SRB Capital LLC