

Harness the power of AI to deepen client relationships and maximize your service value

Is Your Business Asking Questions

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

Professional Service companies who delivers tailored, innovative solutions and build long-term relationships with their clients, many are saying that their **Customer Relationship Software** is not helpful at all.

As a **sales manager** for a **professional service company**, I need to be able to streamline the interactions with my clients and obtain real-time insights for Service Customization.

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 prepared with all insights I need? or am I just “touching base”?

Do my clients understand the value proposition of our products?

What We Have Learned

With traditional **CRM**, these types of insights are 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 professional service companies to help address these types of challenges with their CRM.

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

AI Fueled Solutions for – Conversation Intelligence | Personalized Client Interactions
| Efficient Project Management Tools | Tailored Industry Insights for Strategic Advice

You Are Only 30 Days Away...

Get CRM Right with AI Fueled Selling

Turn Tech from Friction to Fuel and Transform Your Business with Guaranteed Results



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 4

Action Plan to Onboard Adopt and Achieve Outcomes with the Solution

Week 2 & 3

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

What You Get

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

What Professional Services Clients are Saying about the congruentX



“Everything you said to me – Clients not Projects, Outcomes not hours, and People not Resources you have walked out.” It was completely different working with CX and I will tell **anyone** that”.



“CongruentX has given us the large company expertise with the small business cost and personal touch.”



“We have been working with many partners over the years... We have never seen a model like this - it is so adoption and results focused vs just project focused...”