

How SRB Gave Their Sellers Back Nearly a Day a Week Without A Big Tech Project

Without A Big Tech Project

Overview

SRB Capital helps properly qualified, eligible businesses receive wage reimbursement from the IRS. Some CPA firms are not able to find these opportunities for their clients. **SRB Capital** has sophisticated algorithms that comb through the "Micro" payroll detail and apply 100 lines of code to each employee to ensure the employer meets all IRS and SBA rules and will not have to suffer any clawbacks from the IRS and/or SBA for these reimbursements.



“CongruentX has Helped Fuel our Rapid Business Growth”

Rob Lucente | Chief Strategy Officer

Challenge

SRB has experienced dramatic growth – over the last three years. As SRB grew, more sales team members were added, and more systems were introduced – it became clear SRB wanted to help sellers stay focused on selling and to have the right conversations.

The team at SRB has adopted **Microsoft Dynamics 365 Sales** as their single point of truth about its clients. As the ERC application process is complex – there is a need for communication tracking across Outlook and Teams as well.

SRB also needed a way to efficiently onboard new sellers and virtually “coach” the team as the new sellers had client conversations.

Solution

Rob Lucente and the team at **SRB Capital** decided to implement Sales Copilot with **CongruentX**. **CongruentX** is on the tip of the spear of AI Fueled services and had a 3-week engagement that was perfect for the fast-moving business.

The users at **SRB Capital** are just getting to use Sales Copilot but already see the benefit from the ability to have CRM insights surfaced in Outlook which keeps them flowing from call to call without large breaks to prepare.

They also are enjoying the conversation insights from **sales Copilot** that summarizes calls and insights on conversation improvements.

Client Information

SRB Capital, LLC

Address: 801 W. Cherry Street
Suite 200

Sunbury, OH 43074

Phone: 740-324-7001

Web | ERCApplication.com



“Sales Copilot and DialoguePrime was a No Brainer for us as SRB.”

