



# Get CRM Right

Increase User Adoption  
with a 2 Hour Value-Envisioning Lab



## Envision Your Adoption Transformation Strategies

**1**  
**Value Envisioning Listen and Consult 2 Hours**

- People - GTM Owner, IT Owner, User
- Process - Design Thinking - Identify Digital Friction
- Discuss goals and outcomes Benchmarks
- Prioritization

**Get Congruent**  
Align People and Tech

**Get Outcomes**  
Onboard Adopt and Achieve



## What changes are possible through improved Adoption!



- 40% reduction in sales cycle time
- 30% increase in customer retention and enrichment
- 50% increase in lead generation
- 30% increase in sales productivity
- 20% increase in forecast accuracy
- 40% reduction in manual effort



You don't need to start over. Adoption can be achieved with existing systems via simplification, prioritization and a user centric approach.



### People

- Adoption by persona/role
- Change Management
- Onboarding/Training
- Feedback/enhancements



### Process

- Are the current processes as desired?
- Does the system support the processes?
- What is being measured?



### Technology

- Data Stewardship
- Integrations
- Role/Persona specific apps



### Output

- Findings
- Backlog
- Recommendation(s)
- ROA



Using AI - **congruentX** can deliver a hybrid physical and digital workshop based on **Microsoft Catalyst IDEA** and congruentX **ValueX Framework** to deliver insights about your business and how congruentX can help improve your CRM adoption.



# GetCRMRight | Workshop Agenda

1

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## Pre-Meeting Surveys & Prep

- CRM Pre-workshop Questionnaire
- Business Canvas (CX Homework)
- Current Implementation history
- Desired Outcomes

## Hour 1 Design Thinking

- 5 min Review Biz Canvas
- 10 Min review responses
- Current Personas / Use Cases
- Digital Friction | Constraints

## Hour 2 Solution Envisioning

- Show “Challenger” Envisioning Use Cases
- Prioritization
- Solution Brainstorming (what if)

## What You Get Deliverables

- Results of Questionnaire
- Challenges & Priorities
- Top solution priority
- Preliminary ROI for that priority

