



Alignment Lab

1-2 Weeks Prep + Facilitated Session

A facilitated strategic planning session focused on customer strategy for 2026, designed to align leadership teams and develop actionable customer engagement priorities. Leverages Congruity's exceptional facilitation expertise to drive strategic alignment and decision-making.

Scan or click the code to schedule a meeting with us!

Qualifying Criteria

- ▶ Customer engagement identified as strategic priority for 2026
- ▶ Leadership team availability for full-day strategic session
- ▶ Recognition that current customer strategy could be optimized
- ▶ Commitment to implementing strategic planning outcomes

Decision-Maker Profile

- ▶ CEO or executive team collectively
- ▶ Planning 2026 strategic initiatives with customer engagement focus
- ▶ Values professional facilitation for strategic planning and team alignment
- ▶ Recognizes need for systematic customer strategy but lacks internal facilitation and customer engagement expertise

Best For

- ▶ \$5M - \$75M annual revenue with customer-dependent business model
- ▶ Leadership teams recognizing customer engagement as competitive advantage
- ▶ Organizations needing strategic planning facilitation and external expertise
- ▶ Companies with multiple stakeholders requiring alignment on customer strategy

Expected Outcomes

- Leadership Alignment**
Complete executive team agreement on customer strategy priorities for 2026
- Clear Roadmap**
Specific quarterly actions and initiatives for customer engagement improvement
- Resource Allocation**
Informed decisions on customer engagement investment and resource allocation
- Quick Wins**
Immediate opportunities to improve customer relationships and engagement
- Measurement Framework**
Success metrics and tracking systems for customer engagement initiatives

Components

Week
1

Strategic Preparation

- ▶ Leadership team interviews on customer strategy challenges and priorities
- ▶ Customer portfolio analysis and strategic segmentation review
- ▶ Current customer engagement assessment and best practice research
- ▶ Session agenda customization and materials preparation

Full Day
Strategic Session

Strategic Session (Full Day)

- ▶ Customer strategy alignment and priority setting
- ▶ Revenue growth opportunity identification through customer lens
- ▶ Customer engagement strategy roadmap development
- ▶ Implementation planning with specific accountability and timelines

"We trusted Congruity's process and it continues to **pay big dividends.**"

Jessica Wesley
Chief Marketing Officer, Onix