



Strategic Customer Intelligence + Engagement Solutions

Plan Now for 2026 Success

Forward-thinking leaders are already aligning customer strategies for the next planning cycle. Congruity's specialized offerings deliver immediate value **today** while positioning your organization for measurable growth in **2026 and beyond**.

Our Featured Offerings

Limited Availability: We are accepting only a select number of engagements through December to ensure high-impact delivery for each client. Secure your spot now.



The Customer Truth Report

6-8 Weeks

Expose blind spots before they cost you. We uncover hidden risks, competitive threats, and opportunities directly from strategic customers—insight leadership teams can't access on their own.



Growth Catalyst Sessions

3-4 Weeks

High-stakes sessions bring executives and customers together in candid dialogue. Build trust, co-create solutions, and produce boardroom-ready strategies that accelerate growth.



Alignment Lab

1-2 Weeks Prep + Session

When leadership teams aren't aligned, execution falters. This high-energy workshop brings executives together around customer-led priorities and delivers a clear 90-day action plan for growth and retention.



The Customer Truth Report

6-8 Weeks

A focused customer intelligence gathering initiative targeting 5-7 key customers on specific strategic questions. Leverages Congruity's exceptional customer interview and relationship management capabilities to deliver actionable insights for critical business decisions.

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

Qualifying Criteria

- ▶ Specific strategic decision pending within next 6 months
- ▶ Existing strong relationships with 5-7 customers willing to participate in strategic dialogue
- ▶ Recognition that internal customer conversations haven't provided needed strategic clarity
- ▶ Budget authority for strategic customer intelligences.

Decision-Maker Profile

- ▶ CEO, President, or Chief Strategy Officer
- ▶ Has specific strategic questions requiring customer validation
- ▶ Values professional facilitation for sensitive strategic conversations
- ▶ Understands that customers share different insights with external experts

Best For

- ▶ \$25M+ annual revenue with established customer relationships
- ▶ Facing specific strategic decisions where customer input is valuable
- ▶ Strong existing relationships with 5-7 key customers willing to participate
- ▶ Leadership team recognizing value of professional customer engagement

Expected Outcomes

- + **Strategic Validation**
Customer perspective on specific strategic decisions or market direction
- + **Revenue Insights**
Customer feedback of pricing, product development, or market expansion
- + **Implementation Roadmap**
Specific next steps based on systematic customer feedback
- + **Competitive Intelligence**
Customer view of competitive landscape and positioning
- + **Relationship Strengthening**
Enhanced relationships with key customers through strategic engagement

Components

Weeks
1-2

Project Design & Customer Engagement Strategy

- ▶ Strategic question formulations and interview framework development
- ▶ Customer selection based on strategic value and relationship strength
- ▶ Interview guide customization for each customer relationship
- ▶ Discovery interviews of associates in key customer-facing roles

Weeks
3-6

Customer Interview Execution

- ▶ 5-7 professionally facilitated 45-60 minute strategic customer interviews
- ▶ Expert interview facilitation ensuring candid strategic feedback
- ▶ Real time documentation and insight capture

Weeks
7-8

Analysis & Strategic Recommendations

- ▶ Thematic analysis identifying patterns and strategic implications
- ▶ Customer-by-customer insight documentation
- ▶ Strategic recommendations with specific implementation actions
- ▶ Executive presentation and strategic planning session



Growth Catalyst Sessions

3-4 Weeks

A comprehensive assessment and optimization of current customer engagement practices, delivering immediate improvements and strategic recommendations. Combines analysis of existing customer relationships with expert facilitation to optimize customer engagement for revenue growth and retention.

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

Qualifying Criteria

- ▶ Retention is critical to business success
- ▶ Engagement practices are ad-hoc or inconsistent
- ▶ Leadership committed to implementing improvements
- ▶ 3-5 customers willing to provide candid feedback
- ▶ \$10M-\$100M revenue with significant customer dependencies

Decision-Maker Profile

- ▶ Chief Customer Officer, VP of Sales, or CEO
- ▶ Experience customer retention challenges or competitive pressures
- ▶ Values systematic approach to customer relationship optimization
- ▶ Needs actionable recommendations with clear implementation path

Best For

- ▶ Chief Customer Officer, VP of Sales, or CEO
- ▶ Facing retention challenges or competitive pressures
- ▶ Seeking systematic, external perspective on relationships
- ▶ Needing actionable recommendations with a clear path

Expected Outcomes

- + **Immediate Risk Visibility**
Understand retention risks + revenue vulnerabilities
- + **Customer Journey Optimization**
Enhanced engagement touchpoints
- + **Team Alignment**
Unified leadership + customer-facing teams
- + **Quick Win Implementation**
5-8 improvements in 90 days
- + **Revenue Protection**
Strategies to protect + grow key accounts

Components

Week 1-2

Current State Assessment

- ▶ Relationship mapping + engagement review
- ▶ Satisfaction and loyalty data analysis
- ▶ Revenue risk + account vulnerability review
- ▶ Feedback system evaluation and gap analysis

Week 3

Strategic Customer Roundtable

- ▶ One facilitated session with 3-5 customers + leadership
- ▶ Candid customer feedback on relationship experience
- ▶ Competitive vulnerability assessment
- ▶ Insights on evolving needs + future requirements

Week 4

Strategy Development and Implementation

- ▶ Engagement strategy optimization with specific improvements
- ▶ Quick-win identification + 30-60-90 day plan
- ▶ Customer journey enhancement recommendations
- ▶ Executive workshop + team alignment session



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