

congruentX GET CONGRUENT NEWSLETTER



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What's New?

We have THREE book available that our very own **JC Quintana** wrote that dives into all things CRM, Conversation Intelligence, Relationships and more.

Interested in receiving a FREE book. Claim one [HERE](#).

In addition to our monthly webinars we are starting a couple new congruentX series! Stay on the look out!

If you want to stay up to date follow us on LinkedIn.



FEATURED OFFERING

AI Fueled Revenue

Align and Accelerate Your Go to Market Strategy with
AI-Fueled Revenue
Without a Big Tech Project.

CRO's promise the board the GTM strategy that would align and grow the business.

AI Fueled Revenue from congruentX aligns your GTM strategy with your people, technology, and your revenue operations around profitable growth. All while Driving rapid value acceleration for your IT budget

Turn Friction into Fuel with AI Fueled Revenue

[Learn More](#)



"The congruentX Revenue subscription goes beyond systems support. It is a resource that ensures companies stay ahead of the curve with CRM technology and the growth of the business."

Subscription Client

As a part of our daily team calls a quote is shared to the congruentX Team. We'd like to share one of them with you each month.
Enjoy!

"Happiness is something that multiplies when it is divided."

– Paulo Coelho



What we've learned...

"So... You Want Me to Buy More Tech?"

What we learned from hundreds of Chief Revenue Officer (CRO) conversations and how it can help you drive your "Accelerate Revenue Generation" solution play with D365 Sales Enterprise and Customer Insights



Chuck Ingram, CEO

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What We Learned from Industry Experts Over the last five years –

- Companies have invested over \$250 billion and revenue related technology.
- 1200% increase in SDR and BDR headcount
- And how has that gone?
- Efficiency and activity metrics are up (are you getting more or less sales emails today?)
- Quote attainment rates are down
- Win rates are down.

What We Heard from CROs

- "I promised the board we would grow. I cant hire more people."
- "I developed a Go to Market Plan. I can't tell if its helping or hurting in the field or if they are even using it."
- "I want to be more involved in picking the software my team uses"
- "I care about effectiveness not so much about efficiencies."
- "I hear people on my team are using AI – how can we use it as a firm?"
- "I need rapid ROI not big projects"
- "I hear about Rev Ops from other companies. What does Microsoft bring to the table?"
- "I love Gong but IT says it costs even more than our CRM"

What Does CongruentX Do?

Our Reason to Exist

CongruentX helps intrapreneurial chief revenue officers change the way they use their revenue tech stack to outgrow their competitors.

How We Can Help

We will be sharing learnings about working with CROs and our solutions with you throughout this year.

Are some of the things I just mentioned not too familiar? Did you see the movie Moneyball? I hope you will check out our Blog.

We will also be hosing a series of webinars this year. All on how we can use D365 Sales to drive AI Fueled Revenue Growth.

[Read the Moneyball Blog Here](#)

Did you know...

Power Automate can be used to query, update, or interact with azure SQL Server databases, but there are two special field types that are needed in your SQL Server table that specifically enable triggering flows on create or update:

1. **TIMESTAMP:** A Timestamp field is required for Power Automate to trigger on update. This is not a datetime field, it is actually a synonym for the ROWVERSION field type which is an 8-byte hexadecimal value. A table can only have 1 TIMESTAMP column. The Update Trigger is triggered on both create and update
2. **IDENTITY:** Required for Power Automate to trigger on create. IDENTITY values are generated based on a current seed and an increment value. This is not a GUID and it does not guarantee uniqueness. A separate GUID primary id field will be needed for the table to be used by Dataverse as a Virtual Table. It may be preferred to use a GUID value as the table's primary key but add a trigger_id field of type IDENTITY for use by Power Automate if a trigger is needed only on create and not on update.

If the table does not contain the required field types, it will not appear as a valid selection in the trigger step.

Ready. Set. Go Live

A unique client nowadays as things move to the cloud, a Manufacturing company partnered with [congruentX](#) to upgrade their on-premise Dynamics system and database from v8.2 to v9. Not only was it a complete upgrade of their Dynamics system, congruentX also reconfigured their ADFS, assisted in deploying and training on App for Outlook and delivered end user training. congruentX was also tasked with replacing their existing Scribe integrations with KingswaySoft which included an evaluation and re-architecture of the current integrations for maximum efficiency. The engagement completed with a successful go-live in which the client received positive end user feedback of the new system. congruentX delivered a nearly seamless transition and provided endless support for any questions or concerns regarding the new functionality and setup

OUTCOMES NOT HOURS
CLIENTS NOT PROJECTS
PEOPLE NOT RESOURCES

[Case Studies](#)

CX Employee Spotlight

David Murray is a highly esteemed Senior Consultant at congruentX with over three decades of experience in the IT industry. He began his career in 1985, specializing in custom development before transitioning into consultancy work focused on the Microsoft platform. He is highly regarded for his technical expertise and dedication to client satisfaction.



David Murray
Senior Consultant

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At congruentX, David appreciates the CX culture that values open communication, collaboration, and the well-being of its employees. He finds great satisfaction in working alongside his colleagues and appreciates the camaraderie within the company. One of David's notable projects involved creating Power BI reports for a prominent client in the financial industry, showcasing his skills and delivering value. Looking ahead, David has ambitious goals to actively participate in Power Platform development initiatives. His passion for continuous learning and staying at the forefront of technology drives him to take on new challenges. David's dedication, work ethic, and commitment to client success make him an invaluable asset to congruentX. Outside of work, David cherishes his family and recently celebrated his 38th anniversary with his wife. He enjoys watching shows like "Terminal List" on Amazon Prime and "Poker Face" on the Peacock network. Attending a George Strait concert is on his bucket list, and he is excited to fulfill this dream in the near future.

David Murray's expertise, dedication, and passion make him an exceptional Senior Consultant at congruentX and we are blessed to have him as a part of the CX family.

Microsoft Spotlight

Mark brings a wealth of knowledge and expertise to his role. Having joined Microsoft in 2015, Mark is now entering his 9th fiscal year in FY24, demonstrating his commitment and dedication to the company's mission and vision.

Before becoming an integral part of Microsoft, Mark spent over 15 years in the Cisco contact center ecosystem, where he specialized in selling and consulting on customer service solutions for major US enterprises.

Mark's educational background also showcases his well-roundedness and diverse skill set. He holds an undergraduate degree in International Business from Appalachian State University and a graduate degree in Philosophy, Politics & Economics from the prestigious Oxford University.

Currently, Mark leads a team of seven seasoned enterprise sales professionals, overseeing their operations across the southeast region. Under his guidance, the team has achieved significant success, securing key D365 and Low Code customer wins.

When reflecting on his experience working with CongruentX, Mark provided positive feedback on the quality of the people, cx's customer-centric approach, and the focus on smaller micro-efforts that continuously build value and trust with customers.

Notably, Mark highlighted that congruentX's business model aligns seamlessly with Microsoft's sales model for business applications.. in the age of AI-powered copilots, Mark eagerly anticipates witnessing how congruentX will continue to support both customers and Microsoft sellers, further solidifying their impact in the technology landscape and continuing the solid partnership.

CongruentX acknowledges Mark Weaver as a seasoned Microsoft professional whose contributions to the Microsoft ecosystem are invaluable. His leadership, experience, and dedication make him an exemplary role model for aspiring professionals in the industry.

We are excited to celebrate Mark Weaver's achievements and showcase his remarkable journey



Mark Weaver
Microsoft
Regional Sales Director

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EVENTS



- Aug. 17th at 2:00pm est Webinar
"From CRM to AI Fueled, a workshop for Chief Revenue Officers"

[Register Here For Webinar](#)



COMMUNITY SUMMIT

October 15-20, 2023
Charlotte, NC

Visit T-Rex and the congruentX Team
at **BOOTH 523!**

Interested in Attending?!

Use Discount Code **Congruentx10** for 10% off

Don't Miss a
T-Rex Tuesday with
MaX!

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LinkedIn Today!

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