

CongruentX uses Microsoft Copilot for Sales to boost CRM success

An AI-infused approach to CRM

CongruentX is a consulting partner started by customer relationship management (CRM) industry professionals that saw the need to approach CRM success a bit differently. Their founding principles were that engagements should focus on clients not projects, people not resources, and outcomes not hours. "By removing the focus on billing hours, we allow our teams to do what's right by the customer. That's how we achieve the best outcome for our customers," said Chris Cognetta, Chief Technology and Innovation Officer at CongruentX.

To maintain these ideals, the CongruentX strategy centered around driving smaller projects that delivered immediate business value versus lengthy million-dollar contracts. The Microsoft Dynamics 365 and Power Platform portfolio aligned extremely well with these goals, allowing the team to implement and adapt solutions incrementally to accelerate time to market. These tools also offer the added benefit of built-in AI capabilities that can be used to deliver even better customer results.

"The way we see it is people have bought half a trillion dollars work of CRM technology over the last five years, and yet large numbers of customers are still seeing win rates, quota attainment, and the number of meaningful activities fall," said Chuck Ingram, CEO of CongruentX. "AI is absolutely the technology we need to take a company's revenue engine and put it in overdrive, and Copilot for Sales and Dynamics 365 will help us get there."



About CongruentX

CongruentX helps companies align their people and technologies using data, AI, and a new approach to consulting that focuses on clients not projects, people not resources, and outcomes not hours.

Microsoft Business Applications focus
Microsoft Copilot for Sales

Headquarters
United States

Microsoft partner since
2019

Key customer outcomes

6-7 hours of time savings weekly
by removing manual note-taking

67% increase in deal close with
faster meeting follow-up



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Chuck Ingram
CEO, CongruentX

Why Copilot for Sales is a critical tool for improving CRM success

When Microsoft Copilot for Sales was released, CongruentX immediately saw the potential for helping its customers improve revenue generation outcomes because it removes the friction of collecting data for sales organizations. “One of the biggest hurdles to CRM success is adoption within sales teams,” said Ingram. “Using AI conversational intelligence and enterprise data, we can win over the sales teams because the system not only helps them remove manual data recording tasks, but give sellers AI-infused insights to be more successful in their work.”

For example, Copilot for Sales provides the ability to automate the creation of meeting summaries, which CongruentX has shown saves sellers an average of six to seven hours a week—almost a full workday. In addition, the CongruentX team has collected data that indicates sellers who send a summary and next steps to customers within three hours of a meeting increase the probability of closing the deal by 67 percent. Copilot for Sales makes this fast follow-up possible, meaning it not only saves time, but also directly improves seller results—positively reinforcing CRM usage practices. “That’s real money, real metrics, real benefits the sellers are seeing,” said Cогnetta. “And with AI, it’s really only the tip of the iceberg of what can be achieved.”

Because Copilot for Sales integrates directly with the tools that companies are already using—whether that is Teams or Dynamics 365, or even third-party solutions like Salesforce—CongruentX sees a huge opportunity to dramatically improve adoption of revenue generation best practices. “Copilot for Sales becomes a natural extension of what sellers are already doing in their day-to-day roles,” said Ingram. “For example, Forrester has indicated that more than 80% of buyers think that salespeople aren’t prepared enough for meetings. With AI technology, we can easily get the data a seller needs to get prepared for a meeting and have much higher customer satisfaction with seller interactions.”

SRB Capital improves onboarding of sales team with Microsoft Copilot for Sales

One company that has seen the value of Copilot for Sales is SRB Capital Management, a financial services firm that specializes in helping qualified, eligible businesses receive accurate wage reimbursement through the federal Coronavirus Aid, Relief, and Economic Security (CARES) Act Employee Retention Credit. To address the complex documentation needed to correctly apply for the refunds offered through this tax incentive program, SRB Capital



SRB CAPITAL MANAGEMENT
Managed Futures, Clearing & Execution

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developed sophisticated algorithms that comb through payroll “micro” details to ensure the employer meets all Internal Revenue Service (IRS) rules. This not only accelerates processing of applications and ensures prompt payment, but also prevents future claw backs for these reimbursements.

To meet the dramatic growth in demand for its services, SRB has had to add dozens of sales team members over the past three years. The financial services company needed a way to quickly onboard these new sellers and coach them to have the appropriate conversations to convert business. Using Microsoft Dynamics 365 Sales as its single point of truth for client data, SRB saw Copilot for Sales as a way to integrate data from client communications across Outlook and Teams, giving its new team members all the information required to rapidly close business.

Copilot for Sales was configured and actively used across the sales team within 3 weeks, surfacing CRM insights in Outlook to enable faster preparation for calls. By summarizing calls and providing recommendations on how to improve client conversations using AI capabilities, Copilot also helped sellers improve productivity and performance. CongruentX deployed its [DialoguePrime](#) IP solution, offering additional AI-fueled conversational intelligence capabilities that integrate with Copilot for Sales to help sales managers ensure call quality and effectiveness.

“CongruentX has helped fuel our rapid business growth,” said Rob Lucente, Chief Strategy Officer at SRB Capital. “Deploying Copilot for Sales and DialoguePrime was a no-brainer for us.”

Continuing to build AI momentum

CongruentX has been making rapid inroads with customers and partners interested in learning how AI can transform revenue generation operations. It has already implemented Copilot for Sales internally for its own sales teams and has three other projects lined up where its consultants will provide guidance on change management and driving Copilot adoption. The CongruentX team has also been busy sharing its AI expertise with other partners, conducting dozens of partner-to-partner trainings and joint customer presentations over the last six months.

“There are a lot of folks who are looking at Copilot as just another gadget that isn’t really going to move the needle,” said Cогnetta. “I can tell you that in our conversations, no matter what role we’re talking to, no matter what industry they are in, when we explain what Copilot for Sales can do, they are blown away.”

“We think that with Copilot for Sales, Microsoft has a unique opportunity to make a massive step forward and get CRM right,” concluded Ingram. “It is becoming the tip of the spear for us in all of our engagements.”