

Microsoft GET CONGRUENT MONTHLY

WELCOME MICROSOFT SELLERS WHO WANT TO **LAND AND EXPAND** IN Q4

Make Winter Your Season How to Crush Q4 Quota Without Big Consulting Projects Slowing You Down

3 Offerings – Each with 30 Day Results Guaranteed.

Grab a 30-minute Pipeline Consultation to Discover our Step-By-Step Blueprint to Unlock Revenue, Customer Adds and Active Usage in Q4 In Your Territory

Get CRM Right

Dialogue Prime for Viva
Sales

Get Low Code Right

Winter is Coming... Make Winter Your Season



During recessionary times – Companies are looking for rapid ROI and to extend on existing investments. CongruentX is built for Winter

CLIENT NOT PROJECT QUOTE OF THE MONTH

"We have been working with many partners over the years... We have never seen a model like this - it is so adoption and results focused vs just project focused."



FEATURED OFFERING DIALOGUEPRIME



DialoguePrime Conversation Intelligence helps you identify elements of your internal and external conversations that represent risk. It alerts you of opportunities to be more effective in your selling efforts and more proactive in building customer relationships.

CASE STUDY



WHY US LUMBER OUTSOURCED ITS CRM SERVICES TO CONGRUENTX

HIGHLIGHTS OF CUSTOMER CHALLENGE

- IMPROVE CRM ADOPTION FOLLOWING MIGRATION FROM SALESFORCE TO DYNAMICS
- LACKING A COMMON LANGUAGE AND COMMON VIEW OF THEIR CUSTOMERS
- REQUIRED AN EXPERIENCED AND FLEXIBLE PARTNER TO BUILD AN EFFECTIVE CRM FOR THE LONG TERM

SOLUTION HIGHLIGHTS

- PROVIDE KNOWLEDGE AND EXPERTISE IN INTEGRATING AND MANAGING CRM
- GET LEADERSHIP INVOLVEMENT AT ALL STAGES
- LISTEN AND COLLABORATE IN PROVIDING SOLUTIONS THAT FIT THE CLIENT'S NEEDS
- IMPLEMENT PARTNERSHIP AND SUBSCRIPTION MODEL

GO LIVES OUTCOMES NOT HOURS



A unique client nowadays as things move to the cloud, Hamilton Manufacturing 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 Hamilton 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.

PEOPLE NOT RESOURCE



Morgan Johnson
Business Applications
Sales Executive

MICROSOFT SPOTLIGHT

Morgan joined the Microsoft team a little over a year and a half ago. She lives in Dallas, TX and is a part of Suzanne Clarke's team. With more than 9 years of enterprise software experience, Morgan is a true asset to her clients. Morgan's clients appreciate her business acumen and dedication to their success, and they respond as you would expect. She appreciates and recognizes the value of effective partnering and how transparency of shared goals will help drive wins together. Over the past few months she's been working with Tap Haley and Markus Lacher on a couple Dynamics 365 projects for the customer, and has had excellent experience working with the congruentX team. Before engaging congruentX, the customer was in the middle of a difficult, transformative Business Applications implementation with another partner. Half of their business was in the process of implementing Dynamics 365 Sales, while the other half was still using Salesforce. Morgan chose to bring in congruentX to help migrate the side of their business using Salesforce to Dynamics 365 Sales after the challenges the customer faced with their previous implementation partner. CongruentX jumped right in to help Morgan and her client and was dedicated to solving the customer's problems quickly. Morgan was impressed with congruentX's organized implementation plan and simplistic approach that really turned the customer around and made them feel confident about the transition. As a result, Woolpert has asked congruentX to partner with them on additional Dynamics 365 projects and now sees them as a trusted advisor for their digital transformation journey. Like congruentX, Morgan is passionate about helping her clients achieve business outcomes. congruentX is one of Morgan's go-to partners and she looks forward to working with them on many more customer wins.

CX EMPLOYEE SPOTLIGHT

Erin Shamblen, a professional problem-solver and solution architect at congruentX. Erin has a versatile history of helping people use and learn the technology that helps our clients support their customers. Twenty years ago, she seized the opportunity to teach Microsoft Office applications and the rest is history. She went on to teach programming languages and then to work as a website developer. Over the past several years Erin has served in senior consultant and solution architect roles for various technology companies. Now a key member of the congruentX team, she refers to her peers as siblings. Erin appreciates the way the team supports one another. It is one big collaborative and down-to-earth family of people, many of whom have been working together at previous companies over the years. What Erin appreciates most is the agility.

She notes that when a company needs a consulting company like congruentX, they generally know what they want. But what they "want" and what they "need" can be in drastic contrast. It changes and evolves. Keeping the focus on the right outcomes helps her and the team make clients successful. She is all about making people's work lives easier and is most proud of helping turn routine and stressful tasks into better and more effective ways to use technology. Erin loves disaster movies and has a great love for animals. She is currently learning French in preparation for an upcoming family trip to Paris where she hopes to also visit Disneyland Paris as part of her Disney Parks adventures bucket list.



Erin Shamblen
Solution Architect

UPCOMING EVENTS



- 12/2 MSDW PANEL "GETTING CRM RIGHT: WHAT WE'VE LEARNED FROM THE RECENT MICROSOFT BUSINESS APPLICATIONS SHOW SEASON"
REGISTER HERE:
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