



VOLUME 14

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congruentX

GET CONGRUENT

# NEWSLETTER



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### What's New?

We are thrilled to announce the addition of **Mitch Cannady** as Senior Director of Sales.

Our events page is packed with upcoming webinars! Check **it out!**

A new addition coming soon is a Video Series, "howtochange.us."

Be sure to subscribe to our YouTube channel. Check it out **here!**

Stay up to date! Follow us on **LinkedIn.**



# FEATURED OFFERING

## Get CRM Right

Finally...You can Increase Adoption, Productivity, and ROI- Guaranteed!

**Get CRM Right with the Power Platform and AI**  
Amplify Adoption and People Experiences  
With Technology You Already Own

**Increased Adoption and Productivity!**

- Reduction in sales cycle time
- Increase in customer retention and enrichment
- Increase in lead generation
- Increase in sales productivity
- Increase in forecast accuracy
- Reduction in manual effort

**What to Expect**

Align	Adopt	Achieve
<ul style="list-style-type: none"> <li>Deploy Essential Revenue Acceleration Features with AI Onboarding Assistant</li> <li>Consumable and impactful features aligned to GTM only</li> </ul>	<ul style="list-style-type: none"> <li>Adopt and Monitor Relationship Sales   Buyer aligned stages and Playbooks   Sales Forecasting</li> <li>Train   Monitor   Enhance   Support</li> </ul>	<ul style="list-style-type: none"> <li>AI Fueled Rev Ops</li> <li>Use AI to fuel unit economics like customer acquisition retention metrics pipeline and activity metrics</li> <li>Achieve KPIs</li> </ul>

**You only pay full when KPIs are Achieved**

[Learn More](#)



EXACTLY the kind of engagement model we were looking for!

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!**

"Do not follow where the path may lead. Go instead where there is no path and leave a trail."

—Ralph Waldo Emerson

## "I've Been Burned In the Past..." Part Deux

Finally.... How To Get CRM Right And Get Real Business Outcomes – Without All The Risk.



Chuck Ingram, CEO

Connect

Customers are hesitant to buy new CRM. Rightly so.

Over the last five years, companies have invested nearly half a trillion dollars in revenue technology.

About half also say they aren't getting the results they are looking for.

They feel like they have been "Burned in the Past."

Quota attainment, sales meetings, deal size, sales cycle length, and customer satisfaction with sales are going in the wrong direction. Sending more AI-generated prospecting emails is not the correct answer either.

Deciding on what to do with CRM can feel like no decision is the safest. It would be best to have a solution to streamline processes, boost sales, and enhance customer relationships. However, the plethora of options, marketplace noise, and fear of making a wrong decision leave you paralyzed. On top of that – if you hire a consulting company to help – they typically put all the risk on YOU!

But why all the indecision? Matt Dixon, author of "The Challenger Sale and the JOLT Effect," sheds light through his research on "no decision losses" – situations where customers abandon the buying journey without making a choice.

He discovered a surprising culprit: fear. Customers aren't just overwhelmed by choices; they're petrified of choosing the wrong solution and facing the consequences. This fear gets them stuck when making a decision, and then they end up making no decision at all.

They feel like they have been "Burned in the Past."

[Read the Entire Blog Here](#)

## Did you know...

Copilot for Sales has had 3 names in roughly over a year?

Viva Sales launched in Q4 2022. Viva Sales was renamed to Sales Copilot on July 18, 2023. This change was part of the rebranding of Viva Sales to Microsoft Sales Copilot, integrating its capabilities and features into the Sales Copilot platform. The renaming affected the product experience, icon, and subscription name with the transition in September 2023. The name change from Sales Copilot to Copilot for Sales occurred on January 24, 2024.

Microsoft announced that the Microsoft Copilot for Sales subscription would replace the existing Microsoft Sales Copilot subscription, indicating the transition from "Sales Copilot" to "Copilot for Sales" as the new name for the application.

## Ready. Set. Go Live

The recent partnership between congruentX and a medical company has enabled them to move from a system of entirely disparate databases to a singular platform that combines all of their data for access in a single place. What used to take users hours to review, clean, and qualify reports is now taking them seconds as we combine vital data points from their systems to bring essential data to the forefront and enable users to find what they need quickly. This new power platform implementation allows them to automate their invoicing and data clean-up process and simplify their reporting needs. After a successful go-live of their latest customer and contract management platform, they've joined as an ongoing partner through one of our subscriptions further to develop their reporting capabilities and human resource management.

OUTCOMES NOT HOURS  
CLIENTS NOT PROJECTS  
PEOPLE NOT RESOURCES

Case Studies



## CX Employee Spotlight

We are pleased to shine the spotlight on one of our team members, Abbey Corbin. Abbey is one of our senior consultants and delivery leads. She has been a true asset to our team, demonstrating a remarkable drive to learn and assist our clients in achieving their goals. Her passion and dedication are evident in every project she undertakes, making her an invaluable part of our congruentX family.



Abbey Corbin  
Solution Consultant

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Abbey's journey in the industry began eight years ago, following the completion of her MBA program from Florida State University. She stepped into the consultancy world, bringing fresh perspectives and innovative ideas to the table. Her dedication and skill have seen her rise through the ranks to her current position, where she continues to excel and inspire.

When asked about her favorite aspect of working at congruentX, Abbey highlights the deep sense of familiarity and camaraderie within the team. She values the history she shares with her colleagues, believing that this connection enhances her ability to serve clients effectively. This unique environment allows for a 'phone a friend' culture where everyone is eager to support each other, fostering a collaborative and productive workplace.

Reflecting on her most interesting project, Abbey recalls the on-premise to cloud CE migrations, which introduced her to new challenges and learning opportunities. She wishes people knew that her job demands not just mastery of products but also a deep understanding of clients' industries to truly 'own' the business processes involved.

Abbey takes pride in the strong relationships she has built with clients over the years, surpassing the goals set out for her at the start of her career. Looking ahead, she aims to deepen her knowledge in AI, particularly in CoPilot and DialoguePrime, and enhance her skills in power automate to improve internal processes.

Outside of work, Abbey has some fun facts about herself: her unique ability to touch her tongue to her nose, her experience as a high school drum major, her role as a mother of three, and her love for monthly challenges. If she had a superpower, it would be time manipulation to cherish moments with her family even more. Her three wishes include owning a homestead, the ability to teleport, and running a marathon with her husband.

Currently, Abbey enjoys watching the series "Suits" and reading the ACOTR series. A passionate traveler, she aspires to visit all the national parks, with Olympic National Park, Sequoia, and Kings Canyon among her favorites.

Abbey's journey and achievements at congruentX serve as an inspiration to us all. Her dedication, expertise, and vibrant personality make her not just an employee but a cherished member of our team. We are truly blessed to have her with us, and we look forward to many more years of your outstanding contributions.



## Microsoft Spotlight

Suzanne Clark, the Biz Apps Director for SMC East at Microsoft, stands out as a remarkable figure in the tech industry. Based in Dallas Fort Worth, her journey with Microsoft spans 13 years, showcasing a deep commitment to technological innovation and customer success. Her role transcends beyond just leadership; it's about fostering a true partnership and collaboration.



**Suzanne Clarke**  
Business Application Sales  
Director

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Her adventure in the Microsoft ecosystem began in 1996. Her entry into this world was marked by her work with a small partner specializing in project work on Solomon, setting the stage for a career defined by growth and expertise in the field. Over the

years, her dedication and skill have only amplified, leading her to her current position, where she has been making significant contributions for over a decade.

In her collaboration with congruentX, Suzanne has found a partnership that aligns perfectly with her drive and focus. What she values most about congruentX is their customer-centric approach, consistently striving to deliver the best client outcomes. Her dedication to customer needs highlights the synergy between her goals at Microsoft.

Numerous high-impact engagements mark Suzanne's professional journey. She guides her team through complex CRM projects, deepening their understanding of the competitive landscape. This collaboration, especially with team members like Scott, Chuck, and Tasha, has opened the conversation beyond traditional CRM approaches; this showcases her ability to drive innovation and growth. In her role, she thrives on coaching her team and working closely with customers and partners, demonstrating her commitment to maximizing technology benefits and navigating Microsoft's resources for the her desired results.

Away from the corporate world, Suzanne is an enthusiast of remodeling and construction, having built her 47th home, a testament to her creativity and love for bringing designs to life. Her mantra, "gratefulness," also shines through in her professional interactions. She gives a heartfelt shoutout to the team at congruentX, especially Chuck, for being remarkable partners. This gratitude and appreciation for teamwork resonates deeply within her work, contributing significantly to her success and positive collaborations.

## EVENTS



**Feb 7th Continued Series PE Firms with Chuck Ingram & Crystal Zeigler. Register [Here](#)**

**Feb 21st How to Embrace AI without Heartbreak with Chris Cagnetta. Register [Here](#)**

**WEBINAR SERIES**

What The Top Private Equity Portfolio Companies Are Doing With CRM And AI To Accelerate Revenue Growth And Increase The Value Of Their PE Partnership

**Episode 2: The Challenge of CRM Adoption and Data Quality**

**DATE** Feb. 7th **TIME** 12:00-1:00 EST

**REGISTER NOW**

Crystal Zeigler, Microsoft Sales Executive

Chuck Ingram, Ingrammatt, CEO

**Webinar**

**How to Embrace AI Without Heartbreak**

**When: Feb. 21st 12:15-12:45 pm est**

**Chris Cagnetta, CX CTIO, MS MVP**

**Scott** I've seen an increase in ROI!

**Ralph** So easy to use! It saves me time!

**AI** **Sales Collab** **Chat-GPT** **Outgarph**

**congruentx**

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

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