

 **Microsoft GET CONGRUENT MONTHLY**



Have you checked out the NEW Microsoft

Get Congruent

web page that was created for
Microsoft Sellers only!

<https://resources.congruentx.com/msgetcongruent>

CLIENTS NOT PROJECTS
QUOTE OF THE MONTH

"Everything you said to me – Clients not Projects, Outcomes not hours, and People not Resources you have walked out.

It was completely different working with CX and I will tell anyone that"

FEATURED OFFERING
DIALOGUEPRIME FOR VIVASALES

"Stop doing CRM, so you can focus on what really matters – More Revenue, Better Customer Experience and Long-Term Relationships"

DialoguePrime integrates seamlessly with Dynamics CRM. It reduces data entry for all users and ties all phone calls, activities and action items back to your CRM, so you can focus on building and maintaining strong relationships with your customers, not managing your data. And because its stored in your CRM, your charts, dashboards all light up with your user activity without you doing anything!

Learn more at

<https://resources.congruentx.com/dialogueprimeforvivasales>

Upcoming Webinar see below.



CASE STUDY



WHY U.S. LUMBER MADE CONGRUENTX THEIR PARTNER OF CHOICE.

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

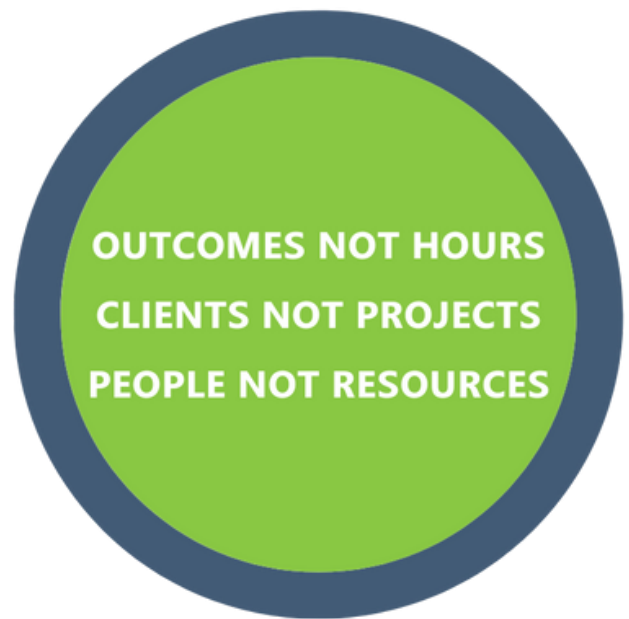
SOLUTION HIGHLIGHTS

- 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

National Advisors Trust(NAT) - NAT was looking for a partner that could assist in migrating their Dynamics platform from 2011 to the latest Dynamics 365CE online. In addition to the platform upgrade NAT needed help with adoption and utilization of Dynamics to increase efficiencies and maintain quality of support to their clients. The congruentX team in a very short time of approximately 12 weeks designed, built, tested, and trained the NAT team in use of a new case management process in Dynamics including data migration from the legacy system. This onboarding was followed by subsequent waves to add additional features and functionality. Throughout the engagement NAT expressed how well the congruentX team managed not only the delivery of the technology but also the relationship with NAT being a true partner for NAT success.



PEOPLE NOT RESOURCE

MICROSOFT SPOTLIGHT



Kevin Oppe
Business Applications
Sales Executive

Kevin Oppe is dynamic when it comes to Dynamics Biz Apps. As one of congruentXs newest partners, and relatively new to Microsoft as well, Kevin came out of the gate strong. He was first introduced to Tap & Jesse as they brought him into an opportunity that was near the finish line. In a very short period, Kevin was able to assess his account list, identify those with the highest propensity to invest in Dynamics, and work with Tap and Jesse at congruentX to develop a strategic target list and a plan to execute. Together they were able to close their first Dynamics opportunity with West Bend Mutual Insurance in less than three months. After the project kicked off, the client had nothing but positive things to say about Kevin and the CX team. Their implementation is going exactly to plan and will introduce many expansion opportunities for new users and workloads. Kevin feels “Tap is a great customer facing resource and Jesse is always open to collaborate on Business Development ideas. I’m looking forward to bringing them into two of my recent Contact Center engagements.” The feeling is mutual and we look forward to working with Kevin to continue to grow his book of business in H2.

CX EMPLOYEE SPOTLIGHT

When someone at a college career fair told Abby Goodwin that her love for “people and databases” would make for a great career in computer science they were right. Armed with a degree in communications and computer science Abby has been showing the love for over seven years. Abby says that collaboration makes all the difference, especially when you work with a team that values it and makes every effort to succeed together. In an environment where people are “willing to pitch in and help one another... all of the time, you never feel alone or stuck on a problem,” Abby says. That feeling of achievement extends to her interactions with clients. One of her favorite things is to make her clients’ lives easier and to see them excited about using the products she helped implement and launch. Because when people are excited to adopt a solution, it also improves the way they use it to manage their business. Abby knows that with solutions like CRM, people must see the value it brings to their role, function, and organization. She recounts with excitement a specific engagement where she helped a new organization join the CRM efforts of their parent company. Helping the company join the current CRM effort while being mindful of the individual needs of the new organization so that both organizations benefit is important to Abby. She sees her job as a marriage of building software and understanding people. Abby feels that “to build something useful, you need to understand the pain points, the job, and put yourself in their shoes.... It is also knowing what the client wants vs. what they really need (and just don’t know about yet)”. This approach is why so many of her former clients still stay in touch with her years after. An avid reader, Abby plans to continue learning more about the products and business practices that make her clients even more effective. Of course, she will first have to take some time away from binge-watching Yellowstone or reading one of the 30 books she has lined up this year.



Abby Goodwin
Solution Consultant

UPCOMING EVENTS



- **2/15/23 CLIENT/PROSPECT FACING WEBINAR- STOP DOING CRM DIALOGPRIME**

[HTTPS://EVENTS.TEAMS.MICROSOFT.COM/EVENT/0CAE9F37-0333-4AEB-9B67-3823D99B174D@E68A9377-A482-425F-8518-383CC69EECDC](https://events.teams.microsoft.com/event/0CAE9F37-0333-4AEB-9B67-3823D99B174D@E68A9377-A482-425F-8518-383CC69EECDC)

- **2/22/23 MICROSOFT ONLY WEBINAR- GET OVER THE HURDLE! HOW TO ACCELERATE SELLING VIVA SALES WITH DIALOGUEPRIME**

[HTTPS://EVENTS.TEAMS.MICROSOFT.COM/EVENT/7D674996-D6AA-4065-A30C-FBE68B0A83BE@E68A9377-A482-425F-8518-383CC69EECDC](https://events.teams.microsoft.com/event/7D674996-D6AA-4065-A30C-FBE68B0A83BE@E68A9377-A482-425F-8518-383CC69EECDC)