

congruentX GET CONGRUENT NEWSLETTER



INSIDE THIS ISSUE

- We're Headed back to Community Summit
- What's New at congruentX
- Featured Offering
- What we've learned- From Chuck Ingram, CEO
- Did You know...
- Monthly Spotlights
- Upcoming Events

We're Headed Back to Community Summit!
Join Us! Use CongruentX10 to receive 10% Off



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



What's New?

We are delighted to inform you that T-Rex and the congruentX Team are returning to the Community Summit. We'd love for you to join us at Booth 523, where you can meet our team and engage in fruitful conversations. Register today! Recieve a 10% discount by using t CongruentX10.

You might have noticed the newsletter sporting a fresh new look. We've revamped the design and included some incredible additional information!

FEATURED OFFERING

AI Fueled Selling For Insurance Distribution

Insurance carriers who distribute through independent agents strive to establish strong and long-term relationships with the right partners and the right agents, so they can grow Wallet Share.

What we have heard is their current technologies are hindering their productivity and costing them valuable time.

[Learn More](#)


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!

"The congruentX Pulse 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."

CX Pulse Subscription Client

"Whatever words we utter should be chosen with care for people will hear them and be influenced by them for good or ill.
– Buddha"

What we've learned...

AI Fueled Selling is a Seismic shift in sales

We all have heard Satya talking about the seismic shift that AI is fueling. We're living in a time of seismic shifts, and we are learning that sales is right in the epicenter.

Check this out: Gartner reports that over half of customers would skip the sales rep spiel. They're not over us, they just want more – they don't need product data sheets. They want insights that make a difference.

But here's the CRO challenge: marketing and service have caught the digital transformation wave. They're out there riding it. Sales? We've got to stop trailing and start leading.

A way to start leading in the seismic shift is a focus on AI-Fueled Selling.

At CX – we have seen higher win rates, and positives like CRO engagement. This happens when we use playbooks driven by tools like Dialogue Prime for Viva Sales plus our Digital Value Acceleration Rooms.

To wrap it up: we're in the midst of a seismic shift in sales. AI-Fueled Selling is about delivering an experience, offering real value, and using AI to knock it out of the park with the insights customers want. And you know what? We're adding more AI fueled horsepower to kickstart FY-2024.

Ask our team to walk you through what we have learned and what we are doing about it with our AI Fueled Selling approach.



Chuck Ingram, CEO

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Did you know...

Did you know....In the first month of Power Platform Co-Pilot, new solutions completed 50% faster than before, along with 70% less errors per Charles Lamanna, Microsoft Vice President of Business Apps.

Fun Fact...DialoguePrime has created over 449 contacts since joining our firm!

That's a savings of 1347 minutes, or 22 hours of time gained back by our team!

How? When using DialoguePrime to record your calls, any person that joins your call whether on the invite or not will be scanned into your CRM. If the user doesn't exist, it will be created for you!

Ready. Set. Go Live

A Management firm 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 they 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 their 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 they expressed how well the congruentX team managed not only the delivery of the technology but also the relationship with them being a true partner for their success.

[Case Studies](#)

OUTCOMES NOT HOURS
CLIENTS NOT PROJECTS
PEOPLE NOT RESOURCES

CX Employee Spotlight

Meet Connor Ingram, a Power Platform Senior Consultant who has been a part of the congruentX team for just over two years. Connor initially started in the industry as an audio engineer with a live event production company, where he discovered a need for an inventory management system and began exploring PowerApps. Connor loves problem-solving and takes pride in creating solutions that help clients' businesses operate smoothly and achieve desired outcomes.

When asked about his favorite aspect of working at congruentX, Connor replied that it's the people. He's thrilled to work alongside brilliant and fun individuals. The company culture is supportive, and the leaders' approach to servant leadership is evident through their proactive attitudes of asking "How can I help?" rather than "Why did this fail?".

Connor's passion for building and creating solutions that solve problems is the driving force behind his work, and he takes immense pride in the relationships he has developed with the cx team and clients. Connor hopes to educate more individuals about the industry and draw them into the field.

Outside of work, Connor enjoys spending time with his wife, playing music, and watching TV shows like "New Amsterdam" and "Shadow and Bone". A little-known or maybe unknown fact about Connor is that he toured the country as a drummer in a country band when he was 18. If Connor could have any superpower, he would choose to fly.

Connor's passion for problem-solving, dedication to his clients, and commitment to building strong relationships make him an essential member of the congruentX team, and we are grateful to have him.



Connor Ingram
Senior Power Platform Consultant

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Microsoft Spotlight

Bob Grohovsky is a highly experienced Business Applications Sales Executive at Microsoft, with a long history of working in various roles within the company since 2005. Known for his passion for solving customer problems and driving partner-driven success, Bob has recently been collaborating closely with [congruentX](#).

BobG is renowned for his natural ability to build relationships, which he establishes through empathetic listening aimed at understanding the core business problems that need to be solved. Once these problems are identified, he aligns them with ideal outcomes and maps out the role that technology will play, providing a clear and agreed-upon return on investment (ROI).

The partnership between BobG and congruentX has been particularly fruitful. BobG appreciates congruentX's unique approach to simplifying the complex nature of CRM platforms, offering a fixed and easy-to-understand solution that allows customers to "Think BIG, Start SMALL, and Move FAST!" He values congruentX's commitment not only to addressing immediate needs but also to setting customers up for long-term success.

We highly value our partnership with BobG, who is a valuable asset to both Microsoft and congruentX, as well as their joint customers. BobG's dedication to delivering industry-leading customer experiences and providing solutions to business clients aligns perfectly with congruentX's values and vision for success. We look forward to continuing our work together and achieving great things in the future. And...Don't forget to ask BobG for the "BobG, Places to Visit in Nashville list" if you ever travel that way!



Bob Grohovsky
Retail & Consumer
Packaged Goods

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EVENTS



- July 12th at 12:10pm est – Fireside Chat with **Chris Cagnetta**, congruentX CTIO, Microsoft MVP about the Future AI, CRM and Does it Replace Me? hosted by **Connor Ingram**

[Register Here For Webinar](#)



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Don't Miss a
T-Rex Tuesday!

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