



congruentX

GET CONGRUENT

# NEWSLETTER

VOLUME 13

JANUARY 2024



## INSIDE THIS ISSUE

- What's New at congruentX
- Featured Offering
- What we've learned
- Did You know...
- Monthly Spotlights
- Upcoming Events



### What's New?

Hope you had a wonderful Holiday!

We have a few upcoming webinars. And a NEW Events Page! Check [it out!](#)

Have you Subscribed to our YouTube channel? You will find a variety of valuable content. Check it out [here!](#)

Stay up to date follow us on [LinkedIn.](#)



# FEATURED OFFERING

## Get CRM Right

### Get CRM Right with the Power Platform and AI

Amplify Adoption and People Experiences  
With Technology You Already Own

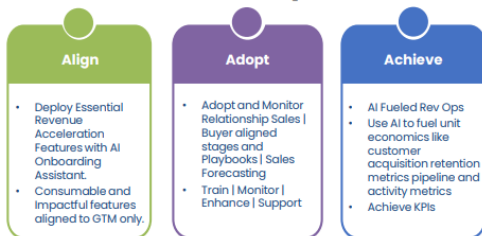


#### Increased Adoption and Productivity!

- 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



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

[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!**

“Cherish your human connections: your relationships with friends and family.”

– Joseph Brodsky

“CongruentX has a heart for our mission”

Client



## What we've learned...

The Playbook for Winter is Different than the Playbook for Other Seasons

2023 was definitely a year of challenges and learning. We thought winter was coming... and it certainly has. We have learned a lot of important things that will keep fueling us after winter is over

. But one thing that stands out is the way to protect your business during a financial winter it is not through growth at all costs but certainly not short-term cuts either.

I know it sounds a little different because we are so used to hearing about layoffs, cost-cutting, and restructuring balance sheets, and while those can be important and sometimes needed. I'm going to share three things we've learned that nobody is talking about today, that might offer a completely different perspective on the way you take advantage of an economic winter.

So, what is it that everyone is missing about thriving in economic winter?  
It is Data.

Specifically starting with CRM data and how you can use data to create a diagnosable, predictable revenue engine that aligns with your Go to go-to-market strategy.

The thing we've learned is simply that we must take the friction out of collecting data – specifically data about how we interact with our prospects and customers.



Chuck Ingram, CEO

[Connect](#)

[Read Entire Blog Here](#)

## Did you know...

That effective Jan 1, 2024, Dynamics 365 for phone and tablets (iOS and Android) will be deprecated for online users. Online users will need to migrate to the Power Apps mobile app. This app will provide updated capabilities, experience and faster load times.

You can learn more at <https://learn.microsoft.com/en-us/dynamics365/mobile-app/migration>

## Ready. Set. Go Live

A financial Company was looking for a partner that could assist in migrating their Dynamics platform from 2011 to the latest D365CE online. In addition to the platform upgrade the client 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 the clients 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.

OUTCOMES NOT HOURS  
CLIENTS NOT PROJECTS  
PEOPLE NOT RESOURCES

Case Studies



## CX Employee Spotlight

Meet Rob Amity, one of our seasoned Solution Architect based in Tampa, FL, with an impressive 15-year journey in the industry. Rob's career kickstarted as a Web/SQL developer tasked with migrating data into Dynamics CRM 4, showcasing his early expertise.



Rob Amity  
Technical Architect

[Connect](#)

Rob values congruentX for its emphasis on career development and opportunities, aligning with his passion for continuous learning.

Describing the company culture as innovative, inclusive, and flexible, he appreciates an environment that nurtures both individual and professional growth.

A standout achievement in Rob's career was successfully implementing a complex e-commerce platform for a major health and nutrition client. This not only showcased his technical prowess but highlighted his effective collaboration and communication skills, emphasizing the importance of innovation and problem-solving.

Looking forward, Rob aims to master Microsoft Fluent UI, deepen his understanding of Microsoft Fabric React, and contribute to MS Fabric open source projects.

If Rob could have a superpower his preference would be of time manipulation, teleportation, or invisibility. This reflects his desire for versatility

Rob brings experience and forward-thinking to contribute to the our culture of innovation and growth.



## Microsoft Spotlight

Meet David Millaud, a seasoned Business Application Specialist residing in Atlanta, GA, and a valuable member of the Microsoft community for the past 20 months.

As part of Jody Detzel's team, David brings 5 years of industry expertise to the table. His journey with congruentX has been marked by a focus on expanding deals in the SMC space.

David has actively engaged with clients like Greystone, Riverside, Valley Health, and Pent Fed. Within the congruentX family, he has collaborated with Chuck Ingram and Mike Hauck. Greystone, in particular, stands out as the most interesting engagement for David.

What he enjoys most about his role is the freedom to think outside the box. David appreciates the responsive nature of the congruentX team, highlighting their proficiency in uncovering opportunities during discovery calls for D365 use cases.

In his spare time, David finds joy in exercising. A shoutout goes to Chuck Ingram, Mike Hauck, and Crystal Ziegler for their collaborative spirit. David Millaud's partnership with congruentX is a testament to innovative thinking and proactive collaboration in the dynamic world of Microsoft solutions.



**David Millaud**  
Business Application Specialist

[Connect](#)

# EVENTS



Jan. 24th Joint Webinar Mike Hauck, congruentX and MSCRM-Addons Bailey Moss. Register [Here](#)

Feb 7th Continued Series PE Firms with Chuck Ingram & Crystal Ziegler. Register [here](#)

Feb 14th Sales Copilot, DialoguPrime and AI-Fueled with Chris Cognetta. Stay Tuned

WEBINAR

**Enhance User Experience and Productivity**  
with congruentX and MSCRM-Addons.com

DATE: Jan. 24th    TIME: 11:30-12:00 EST    REGISTER NOW

 CPXD  
Mike Hauck  
congruentX

 SALES DIRECTOR  
Bailey Moss  
www.addons.com

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 Ziegler  
Marketing  
Sales Enablement

 Chuck Ingram  
congruentX  
CEO

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

Follow us on LinkedIn Today!

Follow Us

