

# congruentX GET CONGRUENT NEWSLETTER



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### What's New?

Did you also see we are growing and added a couple new members to the congruentX team.

Please join us in welcoming Mindy Waters and Jean-Paul. Nicophene. We're thrilled to have them a part of the congruentX Family.

We are were excited to unveil our NEW T-Rex mascot in mid June and asked our community to vote for a name. Drumroll please....T-Rex name is.... **MaX** (even with his short arms he can now **MaX**imize his CRM and ROI parterning with CX.

If you missed it scroll down to the bottom and be sure to follow us on LinkedIn!



## FEATURED OFFERING

### AI Fueled Selling

Selling Has Changed...  
Is Your Selling Technology Keeping Up?

According to an EY Study - Digital-selling companies are **5.7 times more likely to secure prospect meetings** and **hit 150 percent of their quotas** on average

The world has changed.... Customer Expectations have shifted from needing information to expecting insights and outcomes. Customers believe salespeople are unprepared for sales calls 80% of the time.

According to Gartner 83% of buyers don't even want to work with a sales rep.

On the other side - for salespeople - the old way is harder in the digital world. Booked all day on video calls with no time to prepare or follow up. And one size fits all CRM is not helping.

Turn Friction into Fuel with AI Fueled Selling

[Learn More](#)



"I am seeing how subscriptions and a membership mindset are transforming the world of professional services--you're **definitely a pioneer in that area!**"

CX Pulse Subscription 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!

The beginning is the most important part of the work.- Plato

## What we've learned...

### The “Naked” Truth About Building Trust in Sales

What We Learned About How to Get Out of the “I Need More Details” Death Spiral Without Making Stuff Up in Your Sales Proposals.

Even if you are not a Chief Revenue Officer – Sales methodology and sales tech is a huge topic these days. Companies must grow; they can't hire more people and they have bought a lot of sales techs – And none of it seems to be helping. One especially tricky topic that comes up a lot is companies, and their potential buyers are getting stuck in seemingly endless iterations around sales proposals. It can often feel like a high-stakes game of whack a mole, with client conversations around getting more information before making a commitment.

Just when you think you have answered a question – another one pops up. At some point – and we have all been there – the answer becomes – “we don't know that yet” – or (please don't do this) we will have to start making things up.

This scenario signals an underlying issue: a lack of trust and confidence. In this era of all thing's digital disruption and AI, it seems perhaps unpopular but nonetheless important to revisit the human element in business relationships and better conversations to reinvigorate this trust.

Read the entire blog [Here](#)



Chuck Ingram, CEO

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## Did you know...

To all of our Power Platform administrators out there, be sure to check out [this recent announcement](#) by Microsoft, which could increase your system performance, and provide cost savings, too!

Traditionally when you saved emails to Dataverse, let's say through the D365 App for Outlook, they would be stored in your Dataverse database.

Now, Microsoft will be storing emails in Azure Blob storage, which brings its own set of benefits!

## Ready. Set. Go Live

A restaurant franchise and [congruentX](#) partnered on a two-part modernization of their call center and field service technology. They were utilizing an older application in the contact center and with the field service organization that services their nationwide restaurant locations that operate 24 hours a day. Key business outcomes for the engagement included eliminating nonproductive time spent by their service technicians in using the older technology and creating a consistent case entry process for the contact center analysts. To deliver another business outcome by not doing too much at once contact center was successfully migrated to the D365CE online environment and subsequently the Field Service organization was brought on board with the Dynamics Field Service App. During the staggered Go Lives the congruentX teamed worked closely with the clients business and IT teams to deliver another business outcome; A partner that can work with the business stakeholders and IT. As a result, they gained efficiencies in both case management and field service delivery, processing thousands of Cases and Work Orders per week.

OUTCOMES NOT HOURS  
CLIENTS NOT PROJECTS  
PEOPLE NOT RESOURCES

[Case Studies](#)



## CX Employee Spotlight

Stephanie Lemmers, congruentX Senior Consultant, has been an invaluable asset to the team for the past 2.5 years. With a career spanning over a decade, her journey began in 2011 as a customer. Inspired by the excellent consultants she worked with, she leaped from being a CRM Administrator to becoming a consultant herself, setting the stage for her career. When asked about her favorite part of congruentX, she said congruentX is not a family, but rather a guild. Each member brings unique strengths. Together, they collaborate, leveraging their expertise to conquer challenges and ensure the best outcomes for their clients.



**Stephanie Lemmers**  
Senior Consultant

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One of the aspects Stephanie enjoys most about her work at congruentX is the variety of clients she gets to engage with. Unlike focusing on specific industries, congruentX embraces diversity.

When asked about the most interesting project she has worked on at congruentX, Stephanie highlights an engagement that despite the challenges posed by this client, Stephanie views it as an exciting opportunity to consistently deliver value and ensure client satisfaction. She sees herself as a relationship builder and advocates for her clients, committed to understanding their unique needs and aligning the tech to help their businesses thrive and achieve their desired outcomes.

Looking ahead, Stephanie's goals for the next few months and years revolve around obtaining more Microsoft certifications. Although she admits she's not a fan of test-taking, she remains resolute in showcasing her expertise and accomplishments through these certifications.

If Stephanie could offer advice to her younger self, she would encourage herself to persevere and believe in her abilities. Her message to her younger self is simple but profound: "You got this. Keep going, because it's worth it."

When asked about her bucket list, Stephanie dreams of traveling through Europe. Having explored various parts of the United States, Central America, and the Caribbean.

Stephanie Lemmers is a dynamic consultant, an integral part of congruentX's success.

## Microsoft Spotlight

Jody Detzel, regional director SMC EAST, has been an integral part of Microsoft for 3 years. Jody's unwavering dedication to collaboration and shared success has been invaluable. As a seasoned sales and services expert, Jody's passion lies within the realm of Business Applications.

Being an integral part of Microsoft Biz Apps in SMC, Jody is able to directly engage with customer executives, addressing complex and intriguing business challenges. This unique position fuels Jody's enthusiasm, as he finds immense joy and fulfillment in helping customers navigate these hurdles.

Jody greatly appreciates congruentX's innovative and straightforward approach to marketing and customer engagement. He stated "I appreciate the creativity and simplicity in how congruentX markets to and engages our customers. We have had great success in our partnership as a team and look forward to more of the same as we move into FY24!"

Jody's unwavering dedication to his clients and prospects, along with presenting a united front with congruentX, is a testament to his understanding of the power of collaboration.

The partnership between Jody and congruentX has been a blend of expertise and a shared vision for success. We look forward to the continued partnership.



**Jody Detzel**  
**Microsoft**  
**Regional Sales Director**

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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](#)



# 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

Don't Miss a  
T-Rex Tuesday!

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