



Have you Registered for the upcoming Workshop?!

Get CRM Right

Turn your CRM from Friction to Fuel

Join Us and invite your Prospects and Clients!

<https://events.teams.microsoft.com/event/fc473e6c-1d65-4526-b344-6211d6c10f92@e68a9377-a482-425f-8518-383cc69eecd>



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 **GET CRM RIGHT**

Get CRM Right in 30- Days is a different approach to CRM engagements that combines human-centered design and collaborative prototyping to align the needs and expectations of business and IT stakeholders. No “big bang,” one-size-fits-all, monolithic projects here.

This solution can also be located in the Microsoft Partner Solution Offerings. Get CRM Right in 30- Days

www.getcrmright.com

GO LIVES

OUTCOMES NOT HOURS

Whataburger and congruentX partnered on a two-part modernization of their call center and field service technology. Whataburger was 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 Whataburger business and IT teams to deliver another business outcome; A partner that can work with the business stakeholders and IT. As a result, Whataburger gained efficiencies in both case management and field service delivery, processing thousands of Cases and Work Orders per week.



PEOPLE NOT RESOURCE



Vanessa Mesler

Business Application Specialist

MICROSOFT EMPLOYEE SPOTLIGHT

Vanessa Mesler is a Business Applications Sales Executive at Microsoft with a wealth of experience in various roles within Microsoft for the last 9 years. Her insatiable curiosity and entrepreneurial spirit are contagious and bring a great energy to every peer, customer, and partner engagement. Vanessa's approach to building trusted relationships is centered on collaboration, thought leadership, and a commitment to excellence, which are just a few of the core fundamentals of her work.

CongruentX has had the pleasure of partnering closely with Vanessa recently, and it's been a fantastic experience. Vanessa's persistence and professionalism have earned her a reputation as a trusted advisor to her clients, who rely on her insights and expertise to help them navigate complex licensing opportunities. Vanessa's partnership with CongruentX has been especially fruitful. She values the collaborative nature of the team, who are always willing to talk through funding, approach, and enablement to ensure that customers get the best possible outcomes. Vanessa appreciates that congruentX is not just focused on addressing immediate needs but also setting customers up for future success. CongruentX enjoys the partnership with Vanessa, who is a valuable asset to Microsoft, CongruentX, and their joint customers. Her dedication to delivering industry-leading customer experience, and solutions to business clients aligns with congruentX's values and vision for success. We are looking forward to continuing to work together and achieving great things.

PEOPLE NOT RESOURCE

CX EMPLOYEE SPOTLIGHT



Jessica Tse
Senior Consultant

Jessica Tse is a consultant at congruentX. With over nine years of experience working with CRM software, Jessica is an expert in developing and customizing systems to help clients streamline their processes and achieve greater efficiency.

Her journey into the tech industry started in 2014 when she decided to take classes in Centriq to pivot her career into the world of CRM.

What sets Jessica apart is her dedication to continuous learning and growth. Despite having years of experience, she is always willing to learn new things and take on new challenges. In the next month or so, Jessica plans to work towards the Microsoft Certificate: Power Platform Solution Architect Expert

At congruentX, Jessica is known for her positive attitude and supportive teamwork. She loves that everyone at congruentX is willing to help each other and contribute to the company's success. Her favorite part of working at congruentX is the positive energy that surrounds her every day.

When Jessica is not working, she enjoys reading Chinese fiction online and is a big Marvel fan. She is still learning to play the dizi, a Chinese transverse flute, which has been a personal goal since joining congruentX in 2021. She hopes to take a cruise one day...it is on her bucket list!

Jessica's positive outlook, dedication to growth, and passion for helping clients and the team make her an excellent asset to congruentX, and we are grateful to have her as part of our team.

EVENTS AND MORE



WEBINARS

- 5/17/2023 - Get CRM Right-
Turn your CRM from Friction to Fuel
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Don't Miss a T-Rex Tuesday!
Follow us on LinkedIn Today!



<https://www.linkedin.com/company/40843911>

