

congruentX GET CONGRUENT NEWSLETTER



INSIDE THIS ISSUE

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



What's New?

We have 5 of our very own speaking at Community Summit next month! Be sure to them to your agenda.

In addition to our monthly webinars we are starting a couple new congruentX series! Stay on the look out!

If you want to stay up to date follow us on LinkedIn.



FEATURED OFFERING

AI Fueled Revenue

Align and Accelerate Your Go to Market Strategy with
AI-Fueled Revenue
Without a Big Tech Project.

CRO's promise the board the GTM strategy that would align and grow the business.

AI Fueled Revenue from congruentX aligns your GTM strategy with your people, technology, and your revenue operations around profitable growth. All while Driving rapid value acceleration for your IT budget

Turn Friction into Fuel with AI Fueled Revenue

[Learn More](#)



"The congruentX Revenue 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."

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!

"Creativity is part of human nature. It can only be untaught."
- Ai Weiwei

What we've learned...

AI Fueled Revenue Growth. Why paving Cow paths faster might not be the best Idea. Especially when talking to CRO's



Chuck Ingram, CEO

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Curvy Roads Aren't Too Efficient.

When I was a kid – every Sunday we would drive the 20 miles to my grandparents' house. During the trip - My brother and I were always fighting a combination of car sickness and impatience in traffic as my dad took back roads. I remember my sick faced brother rolling up the window long enough to ask why the roads were so curvy. My dad answered – “Well they probably just paved old cow paths. Eventually they will straighten these roads out and make highways out of them.”

It's actually a pretty good analogy for some of the mistakes that we see made on the technology front.

Working with IT Works Great Until...

With all the best of intentions - we work with our client's IT team to implement a brand new piece of revenue technology. 3 months later - realize all we've done is automate clients process that was probably not optimized to start with. Adoption suffers, consumption suffers then expansion and renewal becomes almost impossible.

If we get that far... we often work with IT to design a presales solution. We have automated emails, automated data entry, automated Teams integration (you can fill in some more blanks). Sounds great to our IT friends. But...

A Different Perspective. The Chief Revenue Officer

In walks the CRO. The Chief Revenue Officer is thinking about one thing. Revenue growth. The CRO asks us about how we can help them -

- Identify right clients
- Align to their go to market strategy
- Have the right conversations at the right time
- Drive predictable revenue.

While we on the Microsoft side have a good relationship with IT. The team at Salesforce has often done a really great job of aligning with the business side - specifically the CRO and their team. They have developed points of view and solutions for the CRO.

In many cases Salesforce solutions - to a technical person does many of the same things but their focus and conversation - is on a connected set of specific revenue related stories. Yes, efficiencies are important - to them - effectiveness and revenue trumps all.

They also often walk in with an ecosystem of unicorn type applications that fill CRM cracks or make things much more easy to use.

Cont.



It's Time to Change our Approach with an AI Fueled Revenue Platform

First, we need to speak the CRO's language. A CRO is less concerned with IT language like "Workloads" than they are "Business Processes or Go to Market (GTM) processes". While Microsoft SKUs are important because we get paid from them - a CRO is going to light up more when we talk about outcomes like win rates, conversion rates, forecast accuracy. CROs are also less worried about cloud consumption than revenue operations.

The good news is - We all really do know the language. Because we sell. We just have to remember to "flip the switch" when we talk to CRO's.

CongruentX is helping by leveraging the language of revenue and revenue functions in describing the components of our **AI Fueled Revenue** solution. We are also building a set of over 150 features that will help revenue teams focus on the right alignment, the right data, the right clients, the right conversations, and the right metrics.

Under the covers - it will retire quota on Dynamics 365 Sales Premium, Dynamics 365 Customer Insights, Power Platform Power BI Sales Copilot, consume Azure and even use Fabric.

Whether the play is sales app consolidation, Salesforce surround or Salesforce replace - we can get started with a 2 hour no cost no ECIF required AI Fueled Revenue Envisioning session.

Does it seem like to you – trying to sell Business applications for revenue generation by only talking to IT is kind of like Paving cow paths? Faster way to drive a bit of a broken process?

New fiscal year and time to make some new habits (and CRO friends) together!

Ready. Set. Go Live

The recent partnership between CX and a medical company has enabled them to move from a system of completely disparate databases to a singular platform that combines all of their data for access in a single place. What before used to take users hours to review, clean and qualify report on is now taking them seconds, as we are combining key data points from their systems to bring important data to the forefront and enable users to find exactly what they need quickly. This new power platform implementation is allowing them to automate much of their invoicing and data clean up process, and simplify their reporting needs. After a successful go live of their new customer and contract management platform, they've already joined on as an on-going partner through one of our subscriptions to further develop their reporting capabilities, as well as human resource management.

CX Employee Spotlight

We are thrilled to shine a spotlight on one of our exceptional Senior Consultants, Katilyn Vaz. With a passion for helping clients streamline their operations and a dedication to continuous learning, Katilyn has been a valuable asset to our team for the past few years. Bringing five years of industry experience and an unyielding commitment to client success. Inspired by her father's career, Katilyn embarked on her path early, securing the right degree and Microsoft certifications.



Katilyn Vaz
Senior Consultant

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Katilyn's admiration for congruentX goes beyond its solutions; it's about the people. She values the team's collaborative spirit and their collective willingness to innovate, attributes that define the company's motivating, respectful, and innovative culture. At the core of her dedication is the joy of helping clients optimize operations and achieve their goals, underscoring her enthusiasm for her work every day.

Her ambitions remain steadfast, with plans to earn another Microsoft certification and attain a master's degree within the next couple of years. Beyond her professional pursuits, she's a culinary enthusiast who loves exploring global recipes and sharing the experience with her family (not just eating the food together but preparing it too 😊). If she could give advice to her younger self it revolves around cherishing and spending more time with family and who she wants to be around. If bestowed with a superpower, Katilyn would choose speed, aiming to accomplish more in a day. Her aspirations to one day own a house, embarking on culinary adventures worldwide, and mastering multitasking.

Outside of work, Katilyn's appetite for knowledge extends to binge-watching nature documentaries, and her bucket list includes snorkeling in Australia's Great Barrier Reef. With her passion, dedication, and unrelenting pursuit of growth, Katilyn Vaz continues to drive success at congruentX, leaving an indelible mark on the team and the clients she serves.

Microsoft Spotlight

Ajay joined the Microsoft team two years ago, as an Enterprise Business Application Specialist. He is anchored in the vibrant epicenter of New York City/New Jersey. With a distinguished 15+ years of enterprise software experience, he is committed to helping customers tackle complex problems, and uncovering new business opportunities. His present focus lies in the Financial Services sector, where he contributes to the thriving Capital Markets business, and is part of Adam Beacher's team.



Ajay Bhambri
Microsoft
Business Enterprise
Application Specialist

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Ajay's unwavering commitment to cultivating impactful partnerships and driving sales growth is a testament to his professional prowess. Within the collaborative realm of congruentX, he has found a harmonious partnership. He values the MSFT experience brought by some of the CX team members, which significantly enhances their grasp of licensing and product competency. Moreover, Ajay appreciates the delivery and approach of congruentX (land and expand), applauding their seamless business scalability, while maintaining a consistently accessible demeanor, which makes them a trusted advisor. His collaboration with the CX team underscores the shared growth and success achieved through genuine teamwork.

Ajay has been an incredible account lead. He's upfront with the client on what they should be expecting with Microsoft solutions and does not leave anything to be assumed. He is resourceful and brings in experts when needed, to clarify any questions one might have. Ajay takes time to understand the client's pain points, the partner's delivery approach, and provides necessary support when having difficult conversations with the client.

All in all, the best partnership you can ask for is what Ajay provides. We look forward to continued collaboration and achieving more success together in FY24 and beyond.

EVENTS



- **Sept 13th** AI-Fueled Revenue Demo
- **Sept 27th** Community Summit NA – Roar into Community Summit 2023: Tips and Tricks
[REGISTER HERE](#)
- **Oct 18th**– Live from Community Summit NA Booth 523 (stay tuned)
- **Nov 1st**– What we learned from Community Summit NA 23 (stay tuned)
- **Nov. 8th** Click Learn and congruentX (stay tuned)

Speakers

Come Join the Adventure



Chuck Ingram
10/19 9:45am:
Revolutionizing Revenue Operations with Dynamics 365 CE and the Power Platform: A Guide to Effective RevOps Strategies



Christopher Cagnetta
10/18 9:45am:
How Conversation Intelligence, DialoguePrime for Sales Copilot can help you STOP doing CRM



Connor Ingram
10/18 2:30pm:
How to Create Your Own Azure Service with Zero Code
10/20 9:45am:
Battle of the Apps: Canvas vs. Model



Mike Hauck
10/20 8:30am:
How an effective Business Liaison maximizes your chance for Bizapps Adoption






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