

congruentX GET CONGRUENT
NEWSLETTER



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ClickLearn congruentX

Maximizing ROI on your CRM Investment

Through Efficient Adoption Strategies



Fadi Kanaan
ClickLearn



Mike Hauck
congruentX

QR Code | Nov. 8th | 2:00-2:30pm Est.



What's New?

We had a great time at Community Summit NA just a few weeks ago!

We have a couple upcoming webinars. See below for registration.

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

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



FEATURED OFFERING

Envisioning Lab

This is a chance to Turn Tech from Friction to Fuel in this 2-hour Envisioning Lab.

An opportunity to accelerate growth and join companies experiencing AI-Fueled Revenue.

- 40% reduction in sales cycle time
- 30% increase in customer retention and enrichment
- 50% increase in lead generation
- 30% increase in sales productivity
- 20% increase in forecast accuracy
- 40% reduction in manual effort
- Tech investment ROI of 10x

[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!**

"Every single person we worked with was knowledgeable, professional, personable, and a true pleasure to work with! We had some bumps in the road and they persevered to get us through it."

Client

"Every great dream begins with a dreamer. Always remember, you have within you the strength, the patience, and the passion to reach for the stars to change the world."
- Harriet Tubman



What we've learned...

How you Start sets you up for Success

Starting a Customer Relationship Management (CRM) project can be daunting...especially if you've had a bad experience in the past.

Did you know that over 50% of people are unhappy with their CRM?!

We don't think that this is OK. This is why we highly recommend starting any CRM project with an [Envisioning Lab](#). This lab brings together key stakeholders from the business, IT, and end-users, and is crucial for setting the stage for a successful implementation.

Here's why:

- Alignment of Objectives
- Holistic Understanding
- Customization and Adaptation
- User-Centric Design
- Risk Mitigation and Project Ownership
- Reduced Resistance to Change

Read the entire Blog as I dive into each and explain.



Chuck Ingram, CEO

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[Read Blog](#)



Did you know...

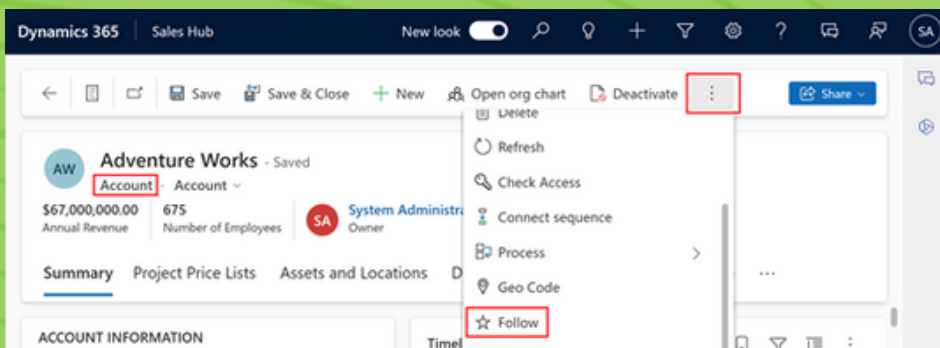
Do you know about the "Follow" feature within Dynamics 365? The Follow feature enables you to selectively keep track of specific records that are important to you, in a consolidated manner. It's a great feature to use when you have a large amount of records in your database but you particularly care about a subset of them for one reason or the other. This piece of functionality is one way that Microsoft Dynamics can save you time and make it easier for you to find those important and high-priority records that you need to access quickly.

For example, if you're in outside Sales, this feature will enable you to follow or "tag" your top 20 target accounts for the year, and help you access them more quickly as opposed to having to search for them individually amongst a large list of records. Or you may be a Customer Service Manager and you want to monitor the customer service activities that are happening across your top 20 customers, or even customers that you're at risk of losing.

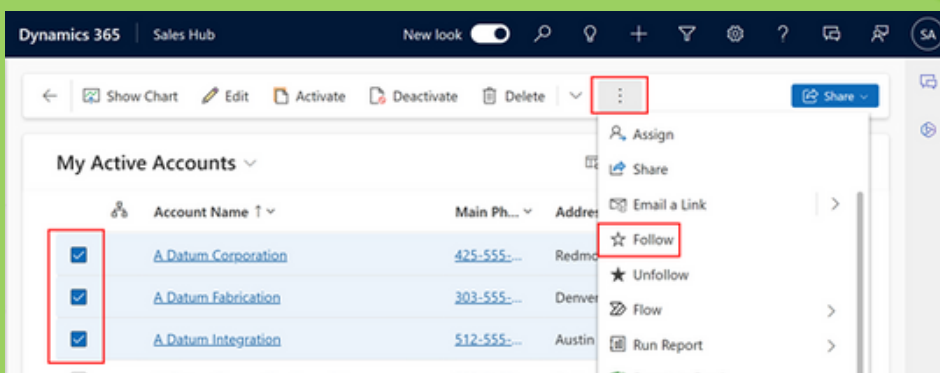
How to Follow a Record

There's two ways of following a record. Either from the record itself, or from the list view of records for that table. Following records from a table's view of records allows you to follow multiple records at once. Below I've shared two screenshots showing both ways.

From the record itself



From the list view of records

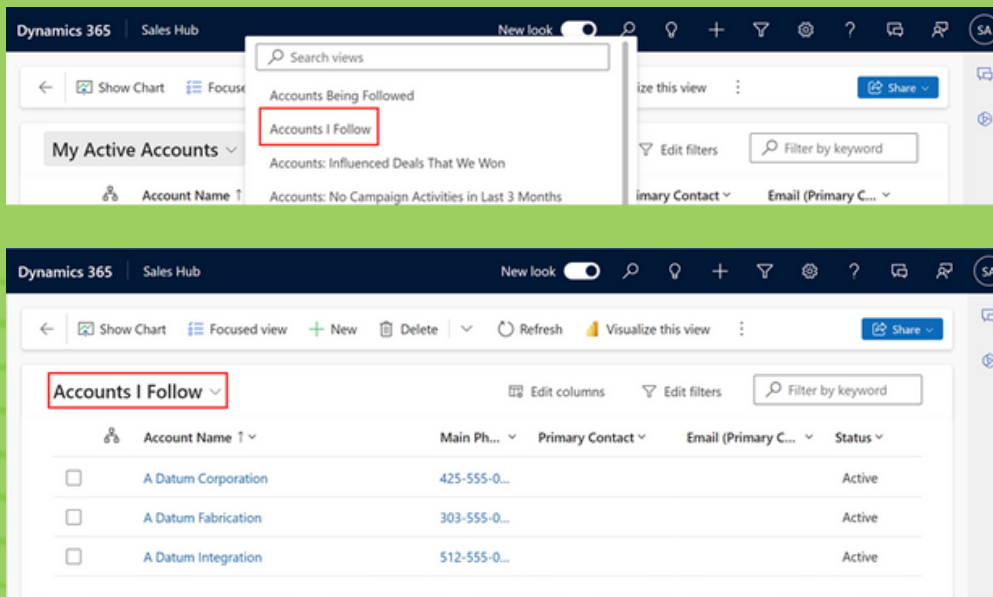


How to View Your Followed Records

To see all of the records you're following in a consolidated list, let's say for Accounts, then you'd click the Account's view selector and choose the "Accounts I Follow" view.



Did you know continue...



Out of the box, this functionality works for standard record types such as Accounts, Contacts, Leads, Opportunities, and Cases. But it can be configured to work for custom tables as well.

Feel free to reach out to us if you have any issues or have questions about how to set it up for your custom tables.

Ready. Set. Go Live

A company in the Financial sector 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 the the clients team in the 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 and being a true partner for their success.

OUTCOMES NOT HOURS
CLIENTS NOT PROJECTS
PEOPLE NOT RESOURCES

Case Studies



CX Employee Spotlight

Patrick DiLullo, Client Success Manager. With a wealth of experience spanning over two decades, Patrick's career journey began when he assumed the role of managing a CRM implementation, with earlier experiences involving voice and data systems implementation.



Patrick DiLullo
Client Success Manager

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What Patrick finds most invigorating about his role at congruentX is the ever-evolving landscape it offers. He enjoys the opportunity to engage with cutting-edge concepts and technologies, ensuring that no day is ever mundane.

However, what sets congruentX apart for Patrick isn't solely the technology; it's the familial company culture that truly distinguishes it.

He enjoys helping clients achieve their business objectives. Among the numerous projects that Patrick has been a part of, one in particular stands out - a large-scale field service implementation. This project involved a comprehensive modernization of call center and field service technology. The results were nothing short of transformative, as the client experienced increased efficiency in case management and field service delivery, processing thousands of cases and work orders every week. For Patrick, it's not just about technology; it's about the people behind it. He firmly believes that a collaborative team can achieve the extraordinary and make complex tasks seem routine.

Beyond his professional life, there's a lesser-known fact about Patrick. He once auditioned to be the guitarist in a famous rock group's touring band, a unique chapter in his life's narrative. If he could have any superpower, Patrick would choose "perfect pitch," a reflection of his deep passion for music.

When asked about his three wishes, Patrick emphasizes kindness and respect for everyone, universal happiness and good health, and, of course, a Super Bowl win for the Cleveland Browns, displaying his unwavering support for his hometown team.

Beyond work, Patrick's current passion is music, and he's currently listening to The Travis Larson Band's "The New Exhibit" and Roy Hargrove's "Nothing Serious."

On his bucket list, you'll discover the dream of producing music in a professional recording studio, a goal that beautifully combines his love for technology and music.

At CongruentX, Patrick's unwavering commitment, dedication, and hard work are deeply valued, and it's a genuine pleasure to have him as an integral part of the congruentX family.

Microsoft Spotlight

We've had the privilege of collaborating closely with Peter Amendola, a Business Applications Specialist at Microsoft, for the past two years. Peter brings to the table a unique blend of industry experience, technical expertise, and an unwavering enthusiasm for collaboration that sets him apart.

Peter's dedication to the partnership shines through in his commitment to effective communication. He understands the importance of sharing comprehensive account

His meticulous approach to account vetting and strategic planning is truly commendable. He goes the extra mile to not only identify opportunities but also to craft well-thought-out strategies for that all-important first meeting. This level of preparation demonstrates his dedication to delivering the best possible outcomes for his clients.

What truly sets Peter apart is his contagious enthusiasm and creativity. He approaches each engagement with a genuine passion for finding innovative solutions and winning deals for his clients. This drive to explore new possibilities and think outside the box is a valuable asset in the dynamic world of technology and business applications.

In his spare time, Peter is a family-oriented individual who enjoys quality time with his two toddlers. While his professional life is dedicated to excellence and partnership, his personal life revolves around daycare, lessons, playdates, and outdoor adventures. Peter's love for the outdoors, fishing, camping, boating, skiing, biking, and various sports reflects his adventurous spirit both inside and outside the workplace.

We've had the opportunity to work together on several clients and prospect engagements with Peter. Notables include the American Type Culture Collection, Bioventus, and a range of prospecting and customer calls. He has worked closely with a dynamic group of individuals within the congruentX family. These collaborative efforts have involved Pat Schanen, Mike Hauch, Chuck Ingram, Markus Lacher, Avi Gupta, and Chris Cognetta.

His commitment to excellence, his collaborative spirit, and his proactive partnership approach makes him an invaluable asset. We appreciate his dedication to driving success for mutual clients and prospective clients, and we're excited to continue working alongside him. Thank you, Peter, for being an outstanding collaborator and partner.



Peter Amendola
Business Application Specialist

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EVENTS



- **Nov 1st**- Community Summit NA Recap: What we learned and Key Takeaways - [Register Here](#)
- **Nov. 8th** Maximizing ROI on your CRM Investment - [Register Here](#)

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

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