

# congruentX GET CONGRUENT NEWSLETTER



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## What's New?

We are growing...again!  
We've added two sellers to  
the congruentX Family!

Scott Bryd & Mike Gargan!  
Join us in welcoming them!

We have many amazing  
upcoming events  
coming up... Community  
Summit NA in just a  
couple weeks as one of  
them.

Stay up to date follow  
us on LinkedIn.

## FEATURED OFFERING

### CX Pulse Subscription

CX Subscriptions are a new way to scale your IT team while generating high adoption, expansion, and ultimately business outcomes.

Did you know CRM can Help Generate Outcomes like –

- \$8.71 for every dollar spent (Nucleus Research).
- Increases sales (by up to 29%),
- Improves productivity (by up to 34%)
- Boost Forecast Accuracy (by up to 40%)
- Customer Retention (by up to 27%)

CX Pulse Subscription offers Monitoring, Training, Unlimited Support, and Ongoing Enhancements. Managed Network Infrastructure. All aligned to your business outcomes.

[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!**

"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

"It's easy to come up with new ideas; the hard part is letting go of what worked for you two years ago but will soon be out of date."

—Roger von Oech

## What we've learned...

I believe Microsoft has the best revenue platform in the industry. Regrettably – Our market share does not reflect that.

Depending on whose numbers you decide to use – Salesforce has between 4 to 6 times the market share that we have in the Microsoft ecosystem. I hope you agree with me – it's time to change that.

Salesforce grew its business by talking to business leaders and certainly has admirable chops there. I recognize it's a different conversation to talk to revenue leaders than IT. While it will take time for many of us to start talking about all the ins and outs of Rev Ops – we can absolutely make an immediate impact on most Salesforce customers. There is a hack though.

Without data – all Go to Market plans fall. Rev Ops metrics mean nothing. Salesforce – as compelling as its market share is – suffers from adoption issues as much or more than any other CRM. We are in a unique moment in time to remedy that.

**Sales Copilot** can unlock CRM adoption like nothing any of us has seen. When implemented right – not just tuned on – Sales Copilot can create an almost frictionless way to capture CRM data and help Salespeople be more efficient.

In just a few weeks – the CRO can understand if their GTM strategy is working or not while at the same time buying back a half day a week or more of seller time.

Rapid revenue, rapid impact, and starts the serious business case for Salesforce replacement. It gets us a seat at the business table and maybe takes the price off it.

Ping us to get your potential customers engaged in a **Free Envisioning Session**.



Chuck Ingram, CEO

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## Did you know...

Power Automate can be used to query, update, or interact with azure SQL Server databases, but there are two special field types that are needed in your SQL Server table that specifically enable triggering flows on create or update:

1. **TIMESTAMP:** A Timestamp field is required for Power Automate to trigger on update. This is not a datetime field, it is actually a synonym for the ROWVERSION field type which is an 8-byte hexadecimal value. A table can only have 1 TIMESTAMP column. The Update Trigger is triggered on both create and update
2. **IDENTITY:** Required for Power Automate to trigger on create. IDENTITY values are generated based on a current seed and an increment value. This is not a GUID and it does not guarantee uniqueness. A separate GUID primary id field will be needed for the table to be used by Dataverse as a Virtual Table. It may be preferred to use a GUID value as the table's primary key but add a trigger\_id field of type IDENTITY for use by Power Automate if a trigger is needed only on create and not on update.

If the table does not contain the required field types, it will not appear as a valid selection in the trigger step.

## Ready. Set. Go Live

A unique client nowadays as things move to the cloud, a Manufacturing company partnered with [congruentX](#) to upgrade their on-premise Dynamics system and database from v8.2 to v9. Not only was it a complete upgrade of their Dynamics system, congruentX also reconfigured their ADFS, assisted in deploying and training on App for Outlook and delivered end user training. congruentX was also tasked with replacing their existing Scribe integrations with KingswaySoft which included an evaluation and re-architecture of the current integrations for maximum efficiency. The engagement completed with a successful go-live in which the client received positive end user feedback of the new system. congruentX delivered a nearly seamless transition and provided endless support for any questions or concerns regarding the new functionality and setup

OUTCOMES NOT HOURS  
CLIENTS NOT PROJECTS  
PEOPLE NOT RESOURCES

[Case Studies](#)

## CX Employee Spotlight

In this month's Employee Spotlight, we introduce Rod Guimaraes, Director of Customer Care at congruentX. Rod's IT journey began in 1992, assembling computers at home and earning his Certified Novell Administrator certification in 1993. With 8 years of experience in Dynamics CRM, he's become an integral part of our team.

Rod's decision to join the congruentX was easy...he had worked with Chris Cогnetta and Mike Hauk was previously. This helped drive his excitement for the move.

Rod's favorite aspect of congruentX is our "friendly and inclusive" company culture, fostering a positive work environment. We deeply appreciate Rod's contributions and value his presence within the CX family.

Collaboration is at the heart of Rod's work. He praises the support he receives from teammates and leadership, highlighting our collective approach to problem-solving. Among the projects Rod's tackled, Dynamics 365 cloud migrations stand out as challenging yet rewarding. Guiding clients through transformation is a source of immense satisfaction, aligning with his passion for learning and innovation.

Acknowledging the occasional challenges in his role, Rod finds fulfillment in addressing client pain points. His extensive IT experience is a point of pride, and congruentX values his expertise.

Rod's goals involve staying current in this ever-evolving industry. He aims to acquire and apply knowledge, pursuing certifications in Power Platform and Azure to fuel his growth.

Reflecting on advice he'd give to his younger self; he'd invest in Amazon stocks at IPO prices and travel with his spouse more before parenthood.

Beyond his professional life, Rod's hidden talent is he was previously a Brazilian martial arts (capoeira) instructor. His current interests include learning Italian through audio books and watching the series "11.22.63." High on his bucket list is to travel to as many countries as possible.

We appreciate Rod's dedication to our clients and his invaluable contributions to our CX family.



**Rod Guimaraes**  
Director of Customer Care

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## Microsoft Spotlight

We could not be more fortunate to have Sherrine Cancilla-Bradani as our Senior Partner Development Manager (PDM). Sherrine has a remarkable journey in the tech industry, spanning nearly four decades. This is a testament to her unwavering dedication, innovation, and desire to excel.

Sherrine's tech odyssey began in 1984 and spanned from a time when the computer revolution was in its infancy. Her first job was ComputerLand in Capitola, California to HP and now Microsoft. Achieving numerous accolades along the way.

Joining Microsoft 5 years ago, Sherrine has made an indelible mark here. She recently added congruentx as part of her portfolio and we have no doubts that together we will exceed the goals we have set for both congruentX and Microsoft's success.

Sherrine's approach of going above and beyond in removing the obstacles and keeping us updated as she helps navigate the complexities of the organization is a breath of fresh air.

Recently, Sherrine, Chuck, and Avi encountered a significant challenge when one of the Microsoft Sellers experienced difficulties tagging CX in MSX to share a Co-sell opportunity. This roadblock was particularly frustrating for Chuck and Avi, who had invested considerable effort in building relationships with Sellers only to be hindered by unforeseen obstacles that prevented us from co-selling. Despite the frustration, they were not deterred. With the assistance of numerous individuals from Microsoft, they spent several weeks navigating through a myriad of tickets, striving to understand and resolve the issue. Their perseverance paid off; after much hard work and dedication, they successfully rectified the problem.



**Sherrine Cancilla-Bradani**  
**Sr. Partner Development  
Manager**

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## Microsoft Spotlight Cont.

Sherrine said that “the most remarkable aspect of this experience was not the resolution of the issue itself, but rather the unwavering patience and steadfastness exhibited by Chuck and Avi throughout the process. They never questioned or doubted my approach; instead, I felt an overwhelming sense of support, tenacity, and enthusiasm as we collectively navigated our way through this challenge. Chuck and Avi’s approach to problem-solving is indicative of their overall attitude towards their work. Their ability to maintain composure under pressure and navigate challenges with grace is undoubtedly a significant contributor to their success with Microsoft and their customers. Their unique approach sets them apart from others; they are truly exceptional partners.”

In the tranquil moments of leisure, Sherrine finds solace in a myriad of activities that bring joy to her life. Her beloved wife, Laura, and she cherish the serene beauty of their waterfront home, often spending time aboard their boat. Their home is a bustling hub of love and laughter, thanks to their large family. Travel holds a special place in their hearts. They are constantly planning their next adventure, with an eye always on the horizon for new experiences. Their wanderlust will soon take them to the charming city of Amsterdam in March 2024, a journey they both eagerly anticipate.

Recently, she’s discovered the simple pleasure of unwinding on their back deck, captivated by the dance of hummingbirds around the feeders. The quest to have one land on her has become a delightful pastime. Intriguingly, she has also found herself drawn to ‘birding’ through the latest AI technology. It’s a fascinating world that she highly recommends exploring.

Sherrine’s journey in the tech industry, her dedication to our partnership with us, and her rich personal life are all a testament to her exceptional character and abilities. We always speak with our clients about using Microsoft AI as fuel to drive revenue. Sherrine does so many things that we are confident that she will help fuel our revenue, from removing constraints to ideating on offerings to opening doors within our partner Microsoft’s organization. We are honored to have her, helping fuel us toward mutual success.

## EVENTS

- **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 Cognetta**

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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**congruentX**  
PEOPLE | TECHNOLOGY | ALIGNED

**COMMUNITY  
SUMMIT**  
Community of Users

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

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LinkedIn Today!

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