

## Microsoft GET CONGRUENT MONTHLY



### **Happy New Year!**

We're thrilled to provide you a one stop resource to help you Crush your Quota!

Check out the NEW Microsoft Get Congruent web page that was created for Microsoft Sellers only!

https://resources.congruentx.com/msgetcongruent

# **CLIENT NOT PROJECT QUOTE OF THE MONTH**

"The congruentX Pulse 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."



# 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.



#### **CASE STUDY**



## WHY DOSATRON MADE CONGRUENTX THEIR PARTNER OF CHOICE.

#### HIGHLIGHTS OF CUSTOMER CHALLENGE

- ADDRESSING PREPAREDNESS & RECOVERY
- SUPPORTING SERVICE AND SUPPORT CHALLENGES
- BUILDING A ROADMAP FOR CRM SUCCESS

#### **SOLUTION HIGHLIGHTS**

- SUBSCRIPTION-BASED SUPPORT
- ON-DEMAND TECHNICAL GUIDANCE
- EXTENDING FUNCTIONALITY AND
   EFFECTIVENESS OF CRM

# GO LIVES OUTCOMES NOT HOURS

Treliant and congruentX, though only partners as of this year, have completed multiple successful engagements together. Beginning with their migration to the cloud, congruentX successfully migrated Treliant's on-prem D365 system to the cloud. Throughout this migration, congruentX took on the role of advisor and supporter in helping them make decisions with the future in mind. By utilizing congruentX training sessions and advisory, Treliant has already taken advantage of many new features available with being online and received positive end user feedback and adoption of their new Dynamics system. Upon completion of their migration to the cloud, they quickly engaged congruentX to merge their newly acquired business unit from Zoho CRM into Dynamics. Not only did they have a tight deadline, approximately 7 weeks, it required a complete database migration and customizations unique to the new BU. congruentX quickly engaged several team members to tackle these requirements. We were able to migrate the thousands of records required to support historical reporting and our functional team seamlessly configured the solution to merge existing functionality with the new team's unique requirements. We also utilized PowerApps to provide necessary automation for live currency rate reporting for financial queries and the ability to clone engagements for faster efficiency. With this successful go-live congruentX has now moved into a support relationship where we are available to support Treliant for all of their Dynamics administration, support or enhancement needs



### **PEOPLE NOT RESOURCE**



Reed Kockanek
Business Applications
Sales Executive

#### MICROSOFT SPOTLIGHT

Reed joined the Microsoft team a little over 3 years ago. He lives in New York City and is a part of Paige Zartman team. With more than 6 years of software experience Reed is exactly what his clients need. Reed treats his clients with professionalism and quickly establishes a mutual respect, and that is evident in how his clients engage with him. He expects the same professionalism from his partners, which makes him a great fit for congruentX. By establishing clear objectives with his partner for what he needs for his clients, he creates a true collaborative environment, which is the key to success in the Microsoft partner channel Currently Reed is working with Tap Haley, Director of sales at congruentX on two contact center opportunities in the financiial services industry. CongruentX presented a quote 10X lower than other partners Reed had spoken to. This automatically gave Reed and MSFT a better chance of winning this deal versus it going to a competitor. It is the first time Reed has collaborated with a partner where the deployment costs helped the overall chances of winning the deal, whereas it usually makes the project a non-starter due to bloated implementation estimates. Reed has found "Thus far, working with congruentX has been a game changer." In the past he has collaborated with partners that usually come in and do the minimal discovery call and give a quote that is 2X over the client's expectation. He found that congruentX approach is the opposite, it is very agile, taking the time to understand the client's case and start small, then expand, rather than the big project. CongruentX and Reed look forward to an ongoing partnership.

#### **CX EMPLOYEE SPOTLIGHT**

In 2017 Chase Pedersen attended a CRM and business consulting presentation that not only intrigued him but sent him on the path to congruentX. He describes the journey as solving a puzzle every time you meet with a new partner to help them succeed and grow in new ways." For Chase, that kind of partnership with clients is something he has also enjoyed with other teammates, particularly with the company founders over the years. He thinks that internal and external partnerships need more than smarts. You need kindness and transparency in addition to the skills needed for the job. Chase likes the like-mindedness of his peers and the focus on the human elements that lead to lots of interesting work and fulfilling engagements. This is one of his favorite things about the company: human-driven partnerships. He says that his favorite thing about working at congruentX is a toss-up between the genuine treatment he sees from the founding partners and the work of developing and implementing innovative solutions to solve client problems. A recent project is a great example of that. Chase started helping the client with a support ticket issue that turned into redesigning and improving the client's document management system using custom integrations with SharePoint. Chase is proud of his growth from minimal experience as an MBA graduate to his current knowledge and confidence in helping companies across many industries. He continues his learning journey diving deeper into the world of PowerBI, Power Platform, and low-code solutions. If Chase could give his younger self advice, he would ask his parents to invest in Apple when the first iPhone was being developed. He is a huge outdoors guy who loves going on hikes, ski trips, and touring the national parks with his family and dog (visiting Redwoods out West and Yosemite Valley are on his bucket list). His love for the wild came in handy when he worked in South Africa for six months researching wild animals. If Chase could have superpowers, it would be super speed. And if he could make three wishes come true, they would all be about making world peace, unlimited clean energy, and elimination of plastic waste a reality.



**Chase Pederson Solution Consultant** 



### **UPCOMING EVENTS**



• 1/18 WEBINAR - W378: GET CRM RIGHT IN 30 DAYS! IS YOUR BUSINESS ASKING QUESTIONS YOUR CRM CAN'T ANSWER? - UST EDUCATION REGISTER HERE: HTTPS://USTEDUCATION.ORG/EVENT/W378-GET-CRM-RIGHT-IN-30-DAYS-IS-YOUR-BUSINESS-ASKING-QUESTIONS-YOUR-CRM-CANT-ANSWER/