

 **Microsoft GET CONGRUENT MONTHLY**

ABOUT US

Welcome to the first addition of our Monthly Newsletter. Let's start by telling you a little bit about who we are. We are a different kind of consulting firm to help companies to align their people and technologies using Data, AI, and a New Approach to consulting so that they can drive better customer experience and ultimate business outcomes. Our clients get value from their CRM investments – often leveraging what they already own.

We do this by focusing on

- Clients not Projects
- People not Resources
- Outcomes not Just Hour



**CLIENT NOT PROJECT
QUOTE OF THE MONTH**

"We formed a truly symbiotic relationship with congruentX, which will definitely help us to grow," said Threatte. "Just from talking to them briefly, I could tell they knew what they were talking about. In addition to having the required knowledge, there's the relational aspect, as they're willing to work with us to help us become what we want to be."



**FEATURED OFFERING
GET CRM RIGHT IN 30 DAYS**

WWW.GETCRMRIGHT.COM



Week 1- Align

Bring IT and business stakeholders together to identify key constraints via design thinking workshops. Where can we reduce digital friction by making sales, marketing, and support tasks more functional, effective, and easier?

Week 2 & 3- Adopt

Engage in development sprints to rapidly design and prototype a low code high-value solution with a continued focus on outcomes.

Week 4- Achieve

Train and deploy only the essential custom IT features to your pilot group for feedback and course corrections. Plan for outcome measurement and realization in the next phase of the journey.

CASE STUDY



WHY ONEDIGITAL HEALTH AND BENEFITS OUTSOURCED ITS CRM SERVICES TO CONGRUENTX

HIGHLIGHTS OF CUSTOMER CHALLENGE

- MOVING CRM DATA AND SERVICES FROM ON PREMISES TO THE CLOUD
- NEEDED HELP WITH SOLVING ISSUES AFTER GOING LIVE WITH ONLINE CRM
- REQUIRED A PARTNER WHO WOULD LISTEN AND UNDERSTAND BUSINESS' UNIQUE NEEDS, AS WELL AS PROVIDE BEST PRACTICES

SOLUTION HIGHLIGHTS

- PROVIDE EXPERTISE ON INTEGRATING AND MANAGING CRM
- UNDERSTAND AND SOLVE CRM-RELATED ISSUES
- LISTEN AND COLLABORATE IN PROVIDING SOLUTIONS THAT FIT CLIENT'S UNIQUE NEEDS
- IMPLEMENT SUBSCRIPTION MODEL TO AUGMENT TEAMS

GO LIVES OUTCOMES NOT HOURS

The recent partnership between congruentX and Diversified Radiology 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 ongoing partner through one of our subscriptions to further develop their reporting capabilities, as well as human resource management.



PEOPLE NOT RESOURCE



Greg Fanady
Senior Dynamics & Business
Applications Specialist

MICROSOFT SPOTLIGHT

“This month we spotlight Greg Fanady. Greg has been in the technology sector for many years, with Salesforce and Oracle, and this past year at Microsoft. He lives in Raleigh, NC, and is a part of Amy O’Donnell’s team. He recently worked with Tap Haley, Chris Cognetta and JC Quintana with his client Bonitz. They worked on the implementations of two congruentX offerings, Get CRM Right and Get Low Code Right. The congruentX team, Greg and Bonitz had an excellent experience working together.

He chose to engage congruentX after the client expressed difficulties getting the outcomes they expected from their current partner. Greg enjoyed that there was “no big, long-drawn-out discovery,” but that congruentX was “quick and they wanted to fix the problem” It made a significant difference to him and his client. This entire process was easy for Greg and his client, and he appreciated the different approach. There was not a license deal, but Greg said that 90% of success is the implementation. He looks forward to working with the congruentX team with other clients and has already referred them to his peers.”

CX EMPLOYEE SPOTLIGHT

Chris started his journey with Dynamics CRM all the way back with version 1.0 as an independent consultant. After years of supporting clients and achieving the prestigious Microsoft MVP status, Chris left DXC Technologies where he served as a Chief Technologist to help build congruentX where he is a founding partner. Chris believes in the importance of constant innovation, which is part of the company’s core objectives. One of the things Chris enjoys most about working at congruentX is that said innovation objectives help him initiate client conversations that solve customer challenges and deliver outcomes. He recalls one of the most innovative projects he worked on recently with a specialty lumber company in Georgia and how it leveraged PowerApps to innovate for the client. Chris is proud of being a technology evangelist and his contributions to the Dynamics community. In addition to his passion for car restoration and vintage jet skis, Chris hopes to add a visit to the Egyptian pyramids to his list of fun things to do.



Chris Cognetta
Co-Founder & CTIO



UPCOMING EVENTS

- SATURDAY NOV. 5TH CHRIS COGNETTA, CONNOR INGRAM & MIKE HAICK WILL BE SPEAKING AT THE POWER UP SATURDAY 365 IN TAMPA, FL.