Customer Story
How Congruex Scaled Strategic Sourcing with AI

75%
increase in supplier bid participation

7 days
to launch Levelpath

87%
categories bid competitively

Key Benefits

- 13 of 15 major categories competitively sourced within months with standardized category strategies across operating units

- 100% increase in strategic sourcing across a national footprint with a lean four-person team by embedding AI into every stage of the process

- Accelerated executive approvals through mobile-enabled workflows, reducing delays and keeping projects moving at the pace of the business across platforms

Congruex was formed in 2017 to take advantage of historic demand for digital connectivity. Founded and led by experienced owners and operators, Congruex has collectively built some of the nation's largest communications infrastructure. They serve data centers, hyperscalers, emerging network operators, wireless and wireline carriers, and government and utility customers nationwide. Their resources are organized to execute against customers' unique priorities.

Congruex delivers engineering, construction, and program management services that help customers plan, design, build, test, and energize digital infrastructure at scale. For customers modernizing legacy infrastructure, Congruex also provides specialized network modernization services that reclaim legacy assets and enable next-generation deployment.

With national scale, local execution, and an operator-led mindset, Congruex serves as a strategic partner, not just a contractor, offering flexible delivery models from standalone services to fully integrated, end-to-end solutions.

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> The AI features within Levelpath allow business units, without corporate procurement involvement, to ask questions through the AI Assistant and develop their own RFPs. And by doing that, they take ownership. The operating units completely control their timeline, so they are not waiting on anyone."
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> SVP of Operational Finance

When the Senior Vice President (SVP) of Operational Finance, Procurement, and Supply Chain stepped into the role, the priority was to create procurement operations that functioned as the engine for transformation. With a lean team of three core procurement professionals along with the SVP, Congruex needed to scale sourcing and capture savings without increasing headcount. By implementing Levelpath, the company built a sourcing engine powered by an AI-native platform that has already delivered significant efficiency and margin gains.

The Challenge

Procurement at Congruex was highly decentralized, with little process uniformity across its operating units. Credit card use was widespread, creating large blind spots in spend reporting and category detail was difficult to capture.

The lack of visibility made it difficult to enforce consistency in sourcing or to identify opportunities for savings. This type of problem is not unique to Congruex. In previous leadership roles, the SVP had personally approved more than 18,000 purchase orders in a year to learn where the company was spending money. That experience shaped his approach at Congruex: build procurement operations as the foundation, establish data visibility, and then expand into strategic sourcing.

Without this foundation, the procurement team could not drive strategic value. Sourcing initiatives would be undercut by poor data and fragmented execution. For a company that competes on margin, this was a real risk. Congruex needed a sourcing process that could scale across its footprint, standardize category strategies, and provide leaders with confidence in both the numbers and the processes behind them.

Operationalizing Procurement Across Units

Rolling out a new procurement platform across Congruex's operating units required both discipline and timing. The procurement team sequenced implementation carefully, bringing Levelpath to business units one by one while avoiding peak construction seasons. Leaders recognized that change management would be most successful if it aligned with the rhythms of the business.

Training was delivered directly by the procurement and AP leadership team, supported by office hours for ongoing questions. This ensured operating

units had hands-on guidance as they adopted the platform. A third-party firm was added to focus exclusively on running bids, freeing the core team to focus on governance, process improvement, and data integrity.

The result was a balanced approach: procurement gained scale and throughput while business units gained visibility and support. Rollout is nearly complete, with only a handful of business units remaining.

Transforming Procurement with AI in Sourcing

Artificial intelligence has become central to Congruex's sourcing transformation. With Levelpath's AI-native tools, procurement can compare supplier responses side by side, identify pricing differences, and analyze bids at a scale that would have been very difficult to do manually, especially with a small team.

A catalog of 650 items, expanded into more than 4,000 bid scenarios, gave the procurement team the ability to run structured RFPs across multiple categories. Construction supplies, fiber optic cable, and subcontractor services were among the first areas targeted. With AI-enabled comparisons, the procurement team quickly identified opportunities for savings and standardization.

AI is not just accelerating sourcing; it is enabling smarter decisions. From streamlining RFP questions to recommending negotiation strategies to reducing superfluous bid items, the platform is embedding intelligence into every stage of the process. This allows Congruex to source competitively without expanding the size of the team.

"The big wow moment with Levelpath was the supplier enrichment process. Using AI, Levelpath took our existing supplier base database, which we were able to upload on day one, and completed the enrichment process. This process gave us competitors, provided category stratification, and allowed us to look at not only who we have been doing business with, but also opened a more competitive subset of vendors," said the SVP of Operational Finance.

Over time, Congruex expects to apply AI across every sourcing flow, creating both speed and sophistication in procurement operations.

Establishing Data Visibility

Beyond sourcing, Congruex needed a better way to evaluate supplier contracts and negotiate with speed. In the past, comparing clauses

> "
> I believe one of the most powerful parts of the tool is the comparison of the responses with advanced analytics and an AI native platform. Simply create thoughtful queries and the AI Assistant scours the documents and provides the answer."
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meant pulling files, routing them through legal, and slowing down the decision process.

Levelpath's AI Assistant changed that dynamic. "We were able to ask the AI Assistant a question, review those contracts, pull out the key terms, and negotiate on the fly. Levelpath's AI Assistant and contract management gave us recommendations we were able to use in negotiations," said the SVP of Operational Finance.

This ability to act quickly not only supports better supplier management but also helps Congruex capture savings opportunities that would otherwise be missed.

Mobile access has added value for Congruex by extending procurement discipline into the field. Leaders no longer need to wait until they are back at their desks to review bids or approve projects. Instead, procurement workflows continue uninterrupted, keeping sourcing decisions moving at the pace of the business.

Resilience and Risk Management

The impact of the sourcing transformation extends beyond efficiency and savings. Congruex has used Levelpath to protect against external pressures such as tariffs. By locking in negotiated pricing at the right time, the organization was able to offset increases and keep costs below original thresholds.

Procurement has also adapted to the realities of supplier engagement. Some vendors face IT restrictions that block them from accessing RFP portals or clicking links. With Levelpath, the procurement team can upload supplier responses directly, ensuring that no competitive opportunity is lost.

The emphasis of line-by-line tracking and validation also builds confidence in reported results. Rather than relying on avoidance-based figures, Congruex ties savings directly to volumes and cost of goods sold, creating a financial picture that withstands scrutiny.

Looking Ahead

Early results show how quickly Congruex is scaling. Within months of launching Levelpath, 13 of 15 major categories were bid competitively, contributing to a 100% increase in sourcing efficiency. Unit cost reductions have been significant, anywhere from 30% savings to 50% savings.
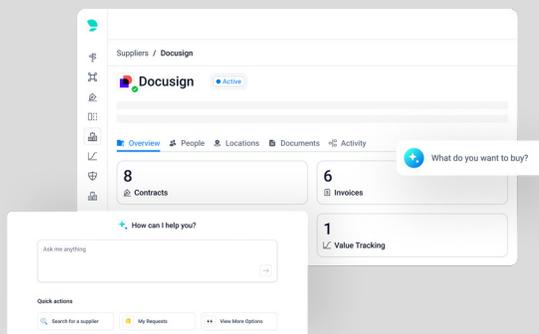
> "Using the Levelpath mobile app, I can review projects, including spreadsheets, and approve items without delay. Utilizing the mobile capability gives me access anytime it is needed."
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> SVP of Operational Finance

The procurement transformation at Congruex is still unfolding. With most operating units now live in Levelpath, the team is preparing for its next major milestone: subcontractor sourcing. As a general contractor, Congruex depends on a blend of self-perform and subcontractor labor, and moving this spend into Levelpath will formalize proposals, ensure accountability, and create rate consistency across projects.

Looking ahead, the goal is to expand these competitive advantages across every operating unit and category. By embedding AI into every sourcing flow, from quick bids to complex RFPs, the company is building a procurement hub that balances speed, intelligence, and scale with a lean team.

With a small team, strong adoption, and AI-native tools, Congruex is setting itself up to drive margin improvement across its billion-dollar business. By operationalizing procurement, expanding into subcontractor sourcing, and leveraging AI for both savings and speed, the company is proving procurement can be both the engine and the competitive edge.

◖levelpath

Discover how Levelpath could help your business scale souring efficiency.

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