



DATA SHEET

# Conga Orchestrate

Intelligent process orchestration



## Drive business results with streamlined, easy workflows

Everyday, repetitive processes are necessary to keep your business running, but they can take a lot of time. Manual tasks lead to errors, poor visibility, and reduced productivity. And as workflows become complex, they become difficult to manage and track.

Elevate your business processes and workflows with Conga Orchestrate™. Visualize, create, automate, and manage the processes that keep you moving. Track your most complex workflows and never miss another step, while gaining insight into every process to see where you can improve.

### Challenges

- Too much time spent on repetitive tasks
- Steps are missed, and traditional employee training doesn't stick
- Building complex processes often requires custom code
- Lack of reporting and visibility into what's happening

### Key benefits

- Easily create complex workflows, with no coding required
- Automate execution for less manual work
- Bridge the gap between IT and business
- Quickly adapt to new regulations and compliance requirements
- Track and analyze for deeper insights and efficiency

“ The biggest benefit from Orchestrate is that we follow the same steps every time and never have to worry about anything falling through the cracks, or anybody going rogue and doing it a different way. ”

Lars Phillips | Avier Wealth Advisors

## Clearly define and streamline your business processes, with the ability to grow as your business grows

- **Cascading and event-driven steps:** Complex logic to kick off steps in detailed processes. Each step can initiate one or more other steps. Steps can be tied to calendar events with due dates dynamically tied to meeting date.
- **Automated process initiation:** Create process efficiency and consistency with automation. Any process can be set to initiate when an account, contact, or event is created or updated. Processes can be set up to run on a recurring basis.
- **Status updates:** See a visual diagram of a process as it executes for clear visibility into where your process stands in real time.
- **Easy process duplication:** No need to recreate an existing process. Clone processes for reuse, import and export processes between organizations, and create process templates.
- **Role-based step assignment:** Assign steps based on account-level role assignments to leverage your data and security controls.
- **Process execution controls:** Ensure complex processes execute correctly. With staging, a step will not be completed until all predecessor steps are completed. A step within a process can also be set to execute only under certain conditions. Manage step completion with checklist items and automate email alerts from steps.
- **Custom object process support:** Write processes against any object for flexible process creation to fit every scenario.
- **Reporting for visibility and improvement:** Leverage reports and dashboards for full visibility into process progress and future workload. Predict what resources will be needed and analyze how to improve processes.



### For more information

Email [info@conga.com](mailto:info@conga.com) or call your local Conga office to talk to an advisor.

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