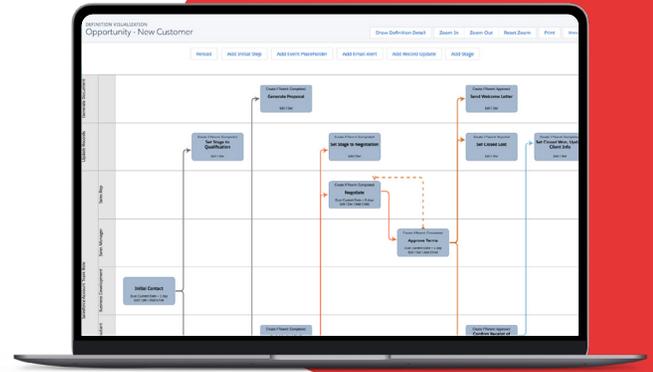


# Conga Orchestrate

Easily visualize, configure, automate, and manage a large number of workflow automation steps in Salesforce with Conga Orchestrate.



Conga Orchestrate is an end-to-end process automation tool built for Salesforce that allows you to quickly build and automate complex workflows for you and your team.

## 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
- Risk of regulatory compliance violations due to missed steps
- Lack of reporting and visibility

## 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

## Results achieved with Conga Orchestrate

**20** hours saved each week

**5** minutes to get set up and running

**67** Net Promoter Score (NPS)

## Features

- **Advanced process analytics:** Offers an eagle-eye view of your workflows to help manage workload, set expectations, and remove bottlenecks.
- **Full-end-to-end flows:** Where our main competitors just handle pieces of workflows, Orchestra can handle workflows of any length or complexity and visualize them end-to-end.
- **Validation rules:** Step-level validation rules simplify data validation and improve transparency.
- **Full audit trails:** Track and report on all activities and touch points within a process to help ensure that regulatory compliance is being met.
- **No-code edits:** Coding in edits to modify and improve workflows can be time-consuming. The ability to make no-code edits allows you to identify desired changes, make those changes, and keep processes moving without delays.
- **Step creation conditions:** Step creation conditions enables you to conditionally determine whether or not a step is created. The step is created only after the designated step creation conditions are fulfilled.
- **Configure non-working days:** Without this feature, processes could be derailed by steps not accounting for days that your team is not in the office. Furthermore, a process without the ability to consider non-working days could cause overdue steps to appear as roadblocks despite running smoothly.

## Case Study:

Anonymous large financial services company

### Challenge

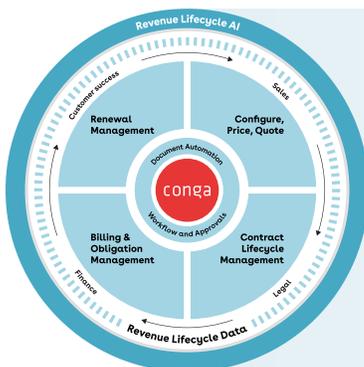
A large financial services company, with a corporate headquarters and several small financial advisor offices needed a more efficient way for their home office to take in all of the front-line requests that came from their satellite locations.. This was quite a complex and time-consuming task—with over 2,500 satellite offices throughout the country.

### Solution

This financial services company began using Conga Orchestra to take in all front-line requests from their satellite office locations. 100+ request types are now entered as new Salesforce records and based on rules, Orchestra initiates the process. For example, new account, withdrawal, trade, beneficiary change—any of these types selected could drive a process. Orchestra ensures the right data is collected to provide the proper context and data for processing downstream.

### Results

- As a result of pairing Orchestra with process automation, they have saved over \$20 million and lowered headcount by 300 people.



Today's leaders across departments have a unique opportunity to gain a Revenue Advantage, and achieving a Revenue Advantage requires a team effort. Conga's Revenue Lifecycle Management (RLM) platform combines Configure, Price, Quote, Contract Lifecycle Management, and Document Automation capabilities on a single open platform. Powered by a unified revenue data model, complete revenue intelligence, and purpose-built AI to help companies address their most complex revenue-related contract questions.



For more information

Email [info@conga.com](mailto:info@conga.com) or visit [conga.com](https://conga.com)