PLAYBOOK

From bottlenecks to breakthroughs: how IT can streamline billing & invoicing to unlock scalable revenue

Cut errors, speed up cash flow, and free IT from invoice support chaos—without replacing your systems.

conga

This playbook is designed to help IT leaders:

- Eliminate inefficiencies in document generation
- Get insight into the role of Conga in automating financial document workflows
- Gain actionable strategies for standardizing and securing invoice generation

62% of IT leaders say they're overwhelmed by managing too many disconnected systems.

The problem	The opportunity	Quick wins with Conga
Fragmented billing tools	IT leads standardization & automation	**80% less time spent** on manual updates
IT bogged down by finance ops	Errors and delays eliminated	**160k hours saved** annually
Risky, manual processes	Finance empowered, IT unburdened	Seamless ERP/CRM integration

Getting started:
the IT Challenge

You manage systems—so why are you fixing invoice templates?

The problem

Organizations face significant challenges that need to be addressed to optimize performance and drive growth. IT is uniquely positioned to help do just that. Do any of these sound familiar to you?

- IT leaders must ensure that their technology stack is efficient, secure, and scalable.

- Billing and invoicing processes remain fragmented, causing errors and delays as finance teams use multiple tools.

- IT often spends time troubleshooting instead of focusing on high-value projects.

Manual invoice processing is still the norm for most companies. Nearly three out of four invoices require human intervention.

Overcoming common roadblocks to success: billing and invoicing challenges IT can address

Do any of these sound familiar?

- ⊗ **Disjointed systems:** reliance on multiple disconnected tools creates inefficiencies.

- ⊗ **Manual errors and delays:** inaccuracies lead to disputes and compliance risks.

- ⊗ **Branding and compliance issues:** nonstandardized templates increase risks.

- ⊗ **IT workload strain:** IT is diverted to troubleshooting instead of strategic initiatives.

- ⊗ **Scalability issues:** high volumes of invoices become unsustainable without automation.

To automate or not to automate

In this landscape of inefficiency, IT can be the hero that transforms organizational operations. By implementing sophisticated automation solutions, IT can drive processes that minimize revenue leakage and reduce payment delays, ultimately enhancing cash flow.

Industry insight: companies implementing automated invoicing have achieved up to **80% reduction** in processing expenses

80%
REDUCTION

IT's role in billing, invoicing, and document generation

*Not *what* IT's role is, but what IT's role should be in the creation of billing and invoicing documents. Hint: it should be as easy as 1,2,3:*

1. **Integration:** ensure seamless functionality between ERP, CRM, and financial tools.

2. **Troubleshooting:** address invoice template issues, branding inconsistencies, and automation failures.

3. **Compliance support:** uphold compliance and security standards for financial documents.

Going nowhere: the real cost of maintaining the status quo

- **Revenue leakage and payment delays:** slow processes cause cash flow issues.
- **Compliance and legal risks:** manual processes can lead to non-compliance.
- **Operational bottlenecks:** teams waste hours reconciling errors.
- **Increased error rates:** manual processing leads to higher error rates, costing revenue.

Staying the same = falling behind

The fix: automate document creation for speed, scale, and accuracy

Automatic document generation creates billing and invoicing documents seamlessly from CRM, ERP, and financial systems.

- **Consistency and compliance** when standardized templates and branding are enforced.
- **Reduced workload** for your financial team when you empower them to manage document creation and updates independently.
- **Automatic generation** streamlines the creation, formatting, and distribution of invoices.
- **Security and compliance** with branding and regulatory standards.

How IT can take control:
A 4-step path to billing efficiency

STEP 1

Identify inefficiencies

- Are invoices generated manually?
- Do errors frequently occur?
- Is IT spending valuable time on document troubleshooting?

STEP 3

Choose a document automation solution

- Select a solution compatible with existing systems.
- Standardize templates and workflows.
- Enable finance to self-generate documents.

STEP 2

Secure buy-in from finance and leadership

- Advocate for compliance and standardization.
- Highlight facilitation of strategic initiatives through reduced IT involvement.
- Position Conga as a reliable, low-maintenance solution.

STEP 4

Start small, then scale

- Begin by automating recurring invoices or commission statements.
- Measure time savings and expand automation efforts gradually.

What to look for in a document automation tool: a checklist

Ready to select a document automation solution that works for your unique business? Make sure you check the boxes on these key features:

☐ **Security and compliance**

    ✓ Ensures only authorized users make changes

    ✓ Enforces audit trails and regulatory standards

☐ **Standardization and branding control**

    ✓ Locks in approved templates

    ✓ Eliminates off-brand communications

☐ **Automation and scalability**

    ✓ Generates thousands of invoices with no lag

    ✓ Scales without increasing IT resource allocation

☐ **Integration**

    ✓ Works across ERP, CRM, and financial tools

    ✓ Requires minimal IT configuration

Worried about disruption? Don't be.

Conga helps IT streamline billing and invoicing **without overhauling your systems.**

You get immediate impact—without massive lift.

- Eliminates manual document processes
- Empowers finance teams with self-service capabilities
- Integrates with any ERP, CRM, or financial tool without extensive changes

Why Conga

Conga automates invoice generation with precision and adaptability, handling large volumes while ensuring accuracy for a Revenue Advantage.

- Works with your existing systems
- Empowers Finance, frees up IT
- Built to scale-without extra IT burden
- Drives accuracy, compliance, and speed

Real-time data = real-time billing

Drive billing & invoicing forward for your business

By following this playbook, IT leaders can effectively streamline billing and invoicing processes, reduce errors, enhance compliance, and free up valuable resources for strategic initiatives. Embracing automation tools like Conga can transform the billing landscape within organizations, fostering efficiency and consistency.

CASE STUDY:

Global telecom provider

Challenge:
- Managing thousands of monthly phone bills manually.
- Difficulty in scalability and customer access to invoices.

Why they chose Conga:
- Automation of invoice generation eliminated manual data entry.
- High-volume processing handled bulk invoicing effectively.
- Time-triggered automation ensured timely invoice dispatch.

Impact:
- **63%** reduction in manual work
- **93%** increase in team output

About Conga

Conga is the pioneer and market leader in Revenue Lifecycle Management. Its platform is chosen by the world's growth champions to accelerate the end-to-end revenue lifecycle and achieve a Revenue Advantage. Conga brings Configure, Price, Quote, Contract Lifecycle Management, and Document Automation capabilities together on a single open platform that works with any ERP, any CRM, and any Cloud. Conga is born for the top line—powered by a unified revenue data model, complete revenue intelligence, and purpose-built AI—to help companies grow, protect, and expand their revenue.

Conga delivers a Revenue Advantage to over 10,000 customers and 6.4 million users around the world. More than 7 million contracts and 46 million quotes are generated annually with Conga. Founded in 2006, the company is headquartered in Broomfield, CO and has offices across the United States, India, and Ireland. Visit conga.com for more information.

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For more information
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