conga

Onboarding customers with Conga

Spend less time managing onboarding paperwork and more time building customer relationships

Start off on the right foot—every time

Welcoming a new customer is exciting and rewarding—not to mention an intricate, time-consuming process. While customer onboarding varies from industry to industry, accurate and timely onboarding documentation is a shared need. When it comes to welcome letters, statements of work, financial action plans, NDAs, non-compete agreements, and company guidelines, the sheer amount of paperwork opens a door to potential error and delays, putting strain on the new relationship.

Build strong connections and consistent document flows from the get-go. Automated document generation and management save your team valuable time and resources when onboarding. Streamline your welcome process with Conga's automation solutions by exchanging documents faster and improving your time to revenue.
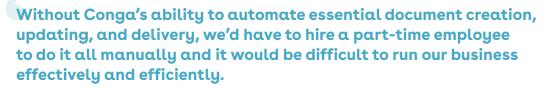
Challenges

- Onboarding a new customer is resource-and time-intensive, with much of the work going into managing a multitude of new onboarding documents and not into the customer relationship.

- Manual, ad hoc document creation creates room for errors or accidentally using outdated templates and content.

- Many companies still retrieve data the old-fashioned, manual way. It happens, and it also takes up valuable time that could be spent on the customer.

- Undefined processes are a recipe for too many cooks in the kitchen, which can lead to inconsistency and a damaged reputation.

- It's a ton of work to create new onboarding documents from scratch. Find the data and content yourself. Hit send and confirm the customer received the information. Every. Single. Time. And repeat.

- Without a solution to effectively manage document creation, you could find yourself trapped by file restrictions or stumped by an unclear version tracking process.

Benefits

- Create a more efficient document sharing process to improve the customer onboarding experience from the beginning of the relationship.

- Build your brand recognition and consistency with automated onboarding document generation.

- Exchange onboarding documents and send items for eSignature automatically to streamline your customer welcome process.

- Automated data retrieval takes the guess work out of content location and document creation, giving you accurate data and reducing the chance for human error.

- Merge complex, multi-page documents with ease using a system for your documents that's built to meet your needs.

- Complete the entire process to onboard a new customer from one central location in Salesforce.

> **"Without Conga's ability to automate essential document creation, updating, and delivery, we'd have to hire a part-time employee to do it all manually and it would be difficult to run our business effectively and efficiently.**
>
> Jason Gabrieli | Financial Advisor at HFM Investment Advisors

HFM Investment Advisors business outcomes

- The time to create a financial action plan was reduced from 1 hour to just 30 seconds by mobilizing document templates to automatically populate client information directly from Salesforce.

- The adoption of Conga's automation capabilities eliminated up to 20 hours per week of manual data entry.

- Customer communications improved with the increase in HFM Investment Advisors' ability to generate documents at a faster rate.

- Document quality and accuracy improved with the advanced automation implementation.

68%
of customers are willing to pay more for the same thing to work with a company with a good reputation for customer service.

Gladly

86%
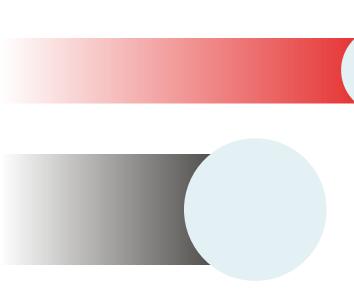of people say they'd be more likely to stay loyal to a business that invests in onboarding content.[1]

About Conga

Conga, the global leader in commercial operations transformation, helps businesses simplify and automate their approach to the essential quotes, contracts, and documents that drive commerce. We help our customers become more agile, so they can adapt quickly to change and create a fluid, connected customer experience. Companies choose Conga for the most comprehensive solution set in the market and expert guidance, enabling them to transform the processes and documents surrounding customer engagement, configure price quote (CPQ), contract lifecycle management (CLM), and the complete commercial operations lifecycle. With Conga, businesses evolve their commercial operations to streamline their revenue processes and derive the meaningful insights that lead to sustained growth.

Conga is headquartered in San Mateo, California with global operations across North America, Europe, and Asia.

Learn more at conga.com or follow Conga on Twitter: @CongaHQ

[1] https://www.wyzowl.com/customer-onboarding-statistics/