

A circular inset image showing three business professionals in a meeting. A man in a blue and white plaid shirt is seen from the back, gesturing with his hands. A woman with long brown hair, wearing a light-colored blazer, is facing him and also gesturing. Another man is partially visible on the left, looking towards the other two. The background is a bright, out-of-focus office setting. The entire image is framed by a red border.

conga

**EBOOK**

# **How to get management buy-in on document automation**

## INTRO

If you've made it this far in your quest for a document automation solution, you already know that automating your business-critical documents can help you execute a successful day-to-day strategy by accomplishing more in less time.

Technology changes so fast that it can be difficult to keep up, but that also means that there are more solutions available than ever before. As companies struggle to hit goals and impact revenue, many teams may find themselves working longer hours and taking on more work.

Implementing a document automation solution is a big investment—and company leadership may not fully understand the challenges your team is facing. So how do you get your managers to buy in on document automation?

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## Toolkit for securing document automation buy-in

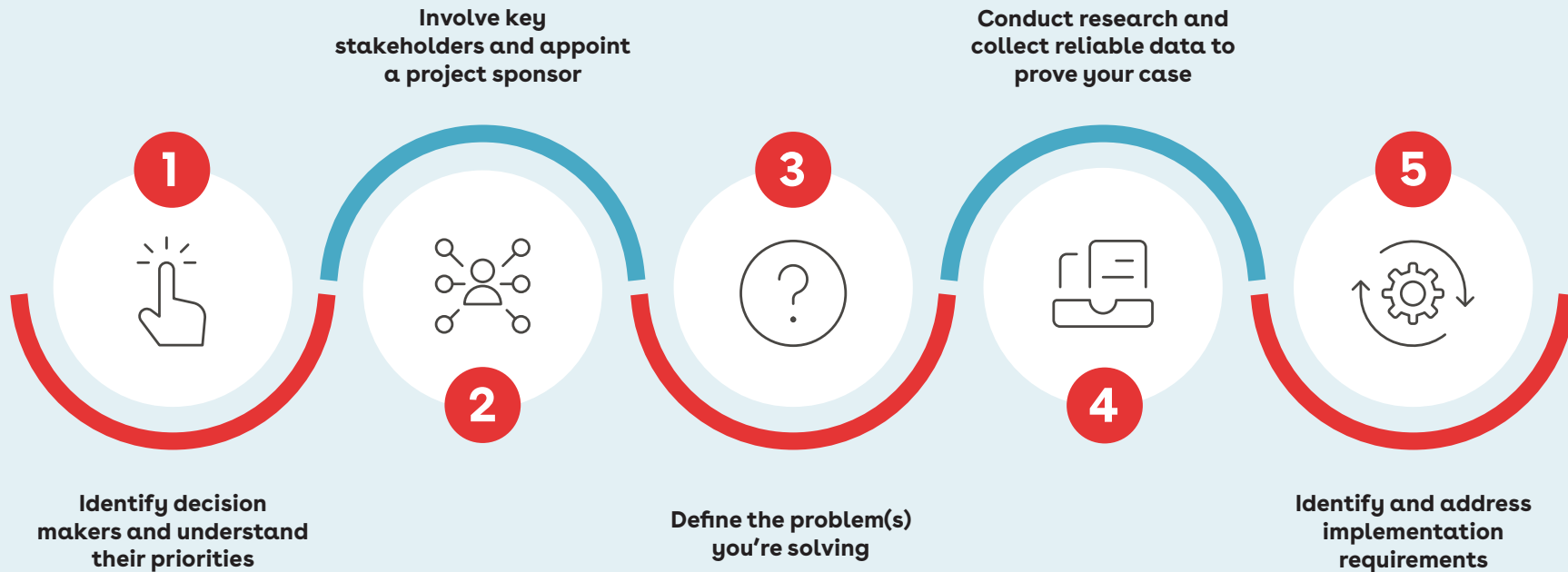
Adopting new technology can be daunting because so many processes and people are involved. It takes careful planning and demonstrating the needs of many to the decision makers. Sometimes the hardest part of this process is knowing where to start. That's why we've developed this easy-to-follow toolkit to guide your quest toward management buy-in for document automation.

### In this eBook, you will find:

- A guided roadmap for identifying key decision makers and shaping the conversation
- A templated presentation deck to streamline your pitch preparation
- A checklist of steps to take prior to meeting with your leadership
- Research, resources, and information on Conga's offerings to help you make the case



# 5 milestones on the path to securing management buy-in





## 1

## Milestone 1

### Identify decision makers and understand their priorities

Consider who you will be pitching to; will you be speaking directly to individual leaders, or will you need buy-in from various stakeholders? Think about your request from their perspective, understanding how a document automation solution could positively impact the chain of command.

## 2

## Milestone 2

### Involve key stakeholders and appoint a project sponsor

Determine your stakeholders based on the team(s) that will be involved throughout the implementation. Appoint a project sponsor who can champion your project and serve as a supportive voice within the leadership team. Be prepared to communicate often with your sponsor and do more listening than talking.





## 3

## Milestone 3

### Define the problem(s) you're solving

Consider what brought you to Conga in the first place. Some of the key challenges our document generation solutions can solve include:

- **Impacting revenue** and **reducing manual work** by automating your business processes
- **Eliminating errors**, increasing accuracy and consistency, and streamlining document creation
- **Increasing operational efficiency** by leveraging templates and dynamic formulas
- **Lowering total cost of ownership** and **shortening onboarding and adoption timelines** by working with a single vendor

## 4

## Milestone 4

### Conduct research and collect reliable data to prove your case

Data doesn't lie. Focus on metrics that demonstrate how your proposed solution will impact the priorities of your leadership (refer to Milestone 1). Be objective in building your case and lean on data to support your request. (See key research and supporting data from Conga at the end of this guide)

## 5

## Milestone 5

### Identify and address implementation requirements

Be proactive and aware of potential implementation challenges you may face if you get approval to move forward with your recommendations. *Are there any foreseeable challenges with IT adoption? Are there special security or onboarding requirements that would need to be met?* Addressing these implementation questions now will save time and effort down the road.



## Pitch deck

Company name

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## Project checklist

Company name

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## Build and present your case

Once you have completed each milestone, you're ready to build your case for onboarding a document automation solution. For this step, Conga has created a templated pitch deck to help you prepare your presentation.

### Pitch deck

You can use our [templated deck](#) to easily plug information into a presentation supporting your pitch for document automation. Make the deck your own, rearranging and deleting as necessary to customize the presentation. We've left several notes to help guide your case development.

### Project checklist

On the next page, we've provided a checklist you can use to ensure a robust pitch.



## Project checklist

- ☐ Identify key leaders or team members who will be your decision makers
- ☐ Create a list of leaders' priorities that may affect their decision

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- \_\_\_\_\_ what are their priorities:
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- ☐ Identify stakeholders who will need to be involved through implementation
- ☐ Appoint a project sponsor and create a cadence for reoccurring discussions
  - Project Sponsor: \_\_\_\_\_
  - Meeting cadence: \_\_\_\_\_
- ☐ Create a detailed map of the problems your suggested solution could solve
- ☐ Conduct research to find legitimate data that will support your case (refer to key research and supporting data from Conga in previous section)
- ☐ Identify implementation challenges and potential solutions
  - Consider teams/members that will be impacted by the new technology and those responsible for overseeing the transaction
- ☐ Compile your work into a pitch deck using Conga's template (refer to the pitch deck above)
- ☐ Schedule and rehearse your presentation of your findings and recommendations to your leaders (lean on your project sponsor for guidance and feedback prior to your formal pitch)

## Conclusion

Don't waste another day on tedious, manual work. Start winning that time back! The right document automation solution can improve productivity for your entire organization and restore your work-life balance.

**Download the presentation deck**

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### Conga resources

1. [State of Revenue Lifecycle Management transformation](#)
2. [Conga Composer data sheet](#)
3. [Getting started with Conga Composer](#)
4. [5 document bottlenecks and how to overcome them with Conga Composer](#)
5. [Digital transformation strategy, customer expectation shifts, & more](#)
6. [Why digital adoption is key in maximizing the value of your technology investments](#)
7. [How digital document management can increase sales and revenue](#)

## About Conga

Conga, the Revenue Company, 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](https://conga.com) for more information.



### For more information

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