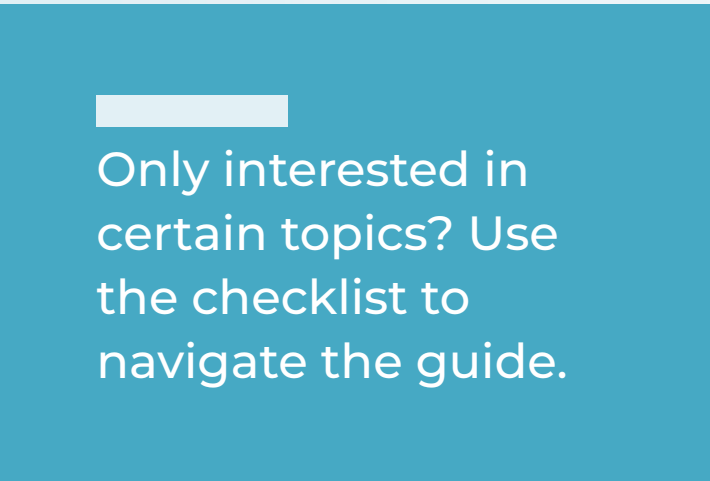# Conga Composer Readiness Guide

An interactive guide compiled of best practices and recommendations that will accelerate your Conga Composer readiness and set you up for success.

Only interested in certain topics? Use the checklist to navigate the guide.

As one of Conga's valued customers, we are invested in helping you maximize the benefits of your solution.

Introduction

Welcome to the Conga Composer Readiness Guide. As one of Conga's valued customers, we are invested in helping you maximize the benefits of your solution. While additional tools are available to contribute to your success, this guide offers recommendations to create an essential solution that supports your organization, team, and ultimately, your Conga product(s).

Compiled with best practices for companies and solutions of all sizes, the Customer Success Team encourages you to leverage this self-service document to evaluate the readiness of your internal teams, support, and external resources. Not all areas are required for review; however, we suggest customers consider all elements for planning, resources, and long-term success.
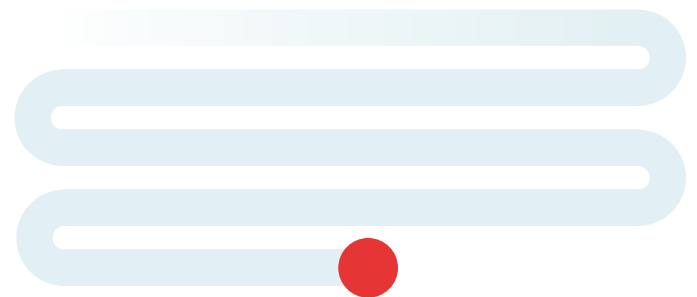
Get Ready

---

01 Supporting Your Solution   Go ▸▸▸
- ☐ Identify internal team to maintain Conga solutions
- ☐ Develop ongoing communication plan for business users
- ☐ Review available Conga resources

---

02 Elements of a Successful Team   Go ▸▸▸
- ☐ Select internal roles/key stakeholders
- ☐ Understand effort and skill needed based on solution complexity
- ☐ Obtain appropriate budget for ongoing resources and services

---

03 Best Practices for Getting Started   Go ▸▸▸
- ☐ Gain Conga Customer Community access
- ☐ Install and configure Composer
- ☐ Provision user licenses
- ☐ Assign Salesforce permissions (optional)
- ☐ Assign Composer licenses to Salesforce users
- ☐ Review relevant resources
- ☐ Take the Composer Smart Start course
- ☐ Join the Composer product user group
- ☐ Build your first solution

---

04 Conga Services   Go ▸▸▸
- ☐ Understand elements of contractual support entitlements
- ☐ Utilize Conga Learning Center and certification options
- ☐ Explore additional Conga services for ongoing maintenance

---

05 Conclusion   Go ▸▸▸

01 | Supporting Your Solution

A strong foundation starts with the appropriate resources to ensure your solution drives digital transformation, sustains business needs, and maximizes value throughout our partnership. Putting the right team together early in your journey is vital for continued success. Depending on your ACV and spend, this includes your internal staff, Conga Technical Support, Conga Managed and Professional Services, and third-party vendors (partners).

Internal Resources

Staffing

Appropriate internal staffing is key to managing, maintaining, and optimizing your Conga solution. Teams supporting Conga will vary, but we recommend reviewing **02 | Elements of a Successful Team** for more information.

Salesforce Admin
Most Conga solutions are built on the force.com platform and require expertise in this area for sandbox refresh, Conga and Salesforce upgrades, regular maintenance, and optimization efforts.

Conga Admin
This technical resource has the skills to manage, maintain, and optimize the system. We strongly recommend that this role be certified annually through Conga.

Conga Champion
The person in the organization who leads in promoting, advocating, and ensuring the successful implementation and use of Conga's products. This person might be responsible for training others, providing support, and being a point of contact between the organization and Conga.

Optional Resources
Included, but is not limited to, technical architects, project managers, contract specialists (if using Contracts for Salesforce), product owners, business systems personnel, platform directors, and sales operations.

Customers with robust teams and efficient processes in place have the highest success and can accommodate multiple use cases.

01 | Supporting Your Solution

Internal Resources

Knowledge

Your team needs appropriate Salesforce and Conga knowledge to troubleshoot issues, make enhancements, and upgrade your solution.

Conga Customer Community
The **Conga Customer Community** is your most valuable one-stop-shop of rich resources, user groups, webinars, knowledge articles, and more. It includes important self-service options to manage your products and get help. For additional knowledge, join the Conga Composer user group to discuss current use cases, review best practices, and get real-time answers.

Conga Customer Community YouTube Playlist
A library of excellent community resources that range from tours, quick starts, templates, and individual steps. The **YouTube Playlist** is available on the Conga Customer Community "Learn" drop-down and is filled with rich content that offers specific action items for the Conga product suite.

Internal Training Plan
Critical for continued end-user success. As new employees come on board, or updates are made to business processes, we recommend keeping a current internal training plan made available to your users.

Conga Learning Center
The **Conga Learning Center** is a great resource with courses for roles ranging from business users to technical admins and is offered in both self-paced and instructor-led formats. Log in via the community.

Documentation Portal
Research topics such as release notes, upgrades, best practices, and step-by-step guides on your Conga solution(s). This **portal** is a great resource for technical documentation, including installation links and system requirements.

01 | Supporting Your Solution

Internal Resources

Processes

Appropriate internal processes have a strong influence on adoption and solution usability.

Steering Committee
Verifies that all teams, including Conga, understand full business needs.

Change management plan
Helps keep end-users informed and trained on business process changes within Conga. Review our **Change Management Best Practices** for further guidance.

Communication plans
Essential for internal updates and keeping business units current. We recommend creating a user feedback channel with comments and questions for the technical team.

Documentation
Maintaining updated records such as test scripts, business processes, and architectural designs assists your team with Conga solution support and relieves stress during upgrades. Upgrades are completed automatically to ensure you're on the latest release without having to do the hard work. We also provide self-paced courses and webinars with an overview of the most recent updates. Our documentation portal offers additional information.

Reporting
The best way to quantify the value of your Conga solution. The Customer Success Team offers workshops that provide insight into reporting options and important metrics. Contact the **Customer Success Team** using the Conga Customer Community 'Get help' wizard at the bottom of every page for workshop availability.

Technical issues
If your Conga solution is not operational or experiences an error that halts business, we recommend having a communication plan in place to alert end users, along with alerting your account team of the active issue to provide further guidance. Also, the business should nominate at least two individuals to submit technical support cases. Technical support cases that require escalation should be indicated during submission. Please reference the **Support** page in the Conga Customer Community or **Support Entitlements** for more details about your plan.

01 | Supporting Your Solution

External Resources

Conga Team

Conga resources are available to help your team attain full value and adoption of your solution. This section provides a high-level overview of Conga's overall offerings.

Review the **My Account** page in the Conga Customer Community to explore your dedicated team and important contacts.

Conga Account Management Team
A great place to start for general questions or concerns. Your Conga Account Team (Account Executive (AE) and Business Account Manager (BAM) delivers your requested information or steers you in the best direction for overall account management and who to contact for what. This team will help you grow, identify new solutions, and explore additions to Conga Composer.

Conga Customer Success Team
Conga's Customer Success Team (CS) exists to champion YOU, our valued customer. You have access to our full team of Customer Success experts to ensure you're getting the most out of your solution and that you have an advocate every step of the way. Once you've purchased Composer, CS can assist you with getting started and answering questions. Contact CS using the Conga Customer Community 'Get help' wizard at the bottom of every page or email **successteam@conga.com.**

Conga Technical Support
Available to rectify any break/fix issues related to your solution. There are different packages available to fit your unique needs. Learn more about Conga Support by logging into the Conga Customer Community and reviewing the Support drop-down menu (Only Admin/Super Users can view this and submit a case). Please reference **Support Entitlements** for more details about your plan.

Conga Professional Services
Conga team that supports projects from a small to large scope. These engagements are typically finite with defined deliverables.

Conga Application Managed Services (AMS)
This is a great way to supplement your internal team with Conga expertise. AMS offers ongoing maintenance, upgrades, optimization, and enhancement support for your solution. There are different AMS levels available depending on need and these services enable customers to proactively maintain their Conga solution at the optimal level. Customers gain full advantage of their Conga products through new feature introductions, upgrades, and scaling.

01 | Supporting Your Solution

External Resources

Vendors

Third-party Conga Preferred Partner Vendors
Conga has strong vendor relationships to assist with complex customer needs and utilizes third-party partners to help accelerate your digital transformation efforts. Your Conga Account Management Team can facilitate an introduction to a preferred partner if interested.

Build the Right Team

Building for Success
Understand potential gaps and determine the appropriate mix of support. For example, customers without a Conga Admin often leverage one of our AMS packages to assist with ongoing maintenance, optimizations, and upgrades.

Remember, our Customer Success Team is just a click away in the **Conga Customer Community**.

02 | Elements of a Successful Team

When managing any SaaS platform, whether complex or customized, having a strong team with the appropriate skill set ensures your strategic solution has your business goals in mind.

The list below includes key internal roles to effectively manage one or multiple Conga solutions. Some roles may not exist in your organization today, but the list serves as a guideline for future planning.

Internal Roles

Salesforce Administrator
Part of IT team. Administers and provisions Salesforce sandbox environment(s), manages all CRM administration activities (user access, maintaining/changing settings, monitoring jobs, etc.), and leads solution deployment across multiple Salesforce environments.

Product Owner
Person at your company who should focus on managing the product backlog, communicating product goals, representing stakeholders, and helping the team stay aligned with the product roadmap.

Product Users
End-users of the product (i.e., sales reps, legal counsel, contract specialists), will need to be enabled to know how to use the product to meet their business needs.

Executive Sponsor
Person at your company who makes the purchasing decision for your Conga solution and drives change within the organization.

Conga Champion/Advocate
Conga Champions are Composer experts who know the product functionality inside and out. This could be a technical person at your company, a third-party partner, or an internal Conga product expert who would help build the solution.

Admin/Super User
Admin/Super Users take on a more technical role and can submit a case concerning any break/fix issues related to your solution. There are different packages available to fit your unique needs. Learn more at **Conga Support** by logging into the Conga Customer Community and reviewing the Support drop-down menu (Only Admin/Super Users can view this and submit a case). Please reference **Support Entitlements** for more details about your plan.

Best Practices

03 | Getting Started

Once you have established the roles required to support your solution, consider the level of effort/lift required to get started. We have put together a list of best practices to get started with Conga Composer.

1 Gain Conga Customer Community access

Register and bookmark the community to access all things Conga. It's your most valuable one-stop-shop of rich resources, product user groups, webinars, knowledge articles, and more. It includes important self-service options to manage your products and get help.

2 Install and configure Composer

Navigate to the **install center** in the Conga Customer Community to download purchased packages under the "Get started" tab. You must be a Super/Admin User to access this tab. If you're not already a designated Super User, please email **community@conga.com**. Then, follow the instructions for **configuring Conga Composer.**

3 Provisioning licenses

Once Composer is **set up** and installed, Conga will provision your licenses. If you need help with installing Composer, you can work directly with our DocGen experts via the **Conga Customer Community Composer User Group** right-hand panel to get help.

4 Assigning Salesforce permissions (optional)

This optional task allows your team to customize permissions for each user profile (if necessary), providing dynamic access to your solution. Complete this optional task before assigning licenses. For more information and step-by-step instructions, please review **permissions needed for Composer**, **configuring profile permissions**, and **configuring permission sets**.

5 Assigning licenses

Conga and its Provisioning Team do not assign all customer licenses. You must take action by assigning your Composer licenses to every Salesforce user who requires Composer access. For more information and step-by-step instructions, please review the **documentation portal**.

Best practices for getting started continues on next page.

Best Practices

03 | Getting Started
(continued)

6 **Review relevant resources**

Start by logging into the Conga Customer Community and reviewing the **new customer checklist** under the "Get started" tab. This is where you can take a community tour, evaluate onboarding documents, sign into the **Conga Learning Center** to take free courses, watch expert-led webinars, and review installation guides. More information can be found in the Composer **use case library** to see how other companies in the industry are using Composer.

7 **Take Composer Smart Start course**

This is a **free course** hosted in the Conga Learning Center that sets you up for success by walking you through the first actions to take after installing your product. Although not required, it offers a path to getting started.

8 **Join Composer user group**

The Composer **user group** is your chance to connect with peers in the industry, share use cases, and learn tips and tricks. Join today to get real-time answers from product experts. Reference the "New to Conga Composer" section on the right-hand side of the user group page where you'll find a **smart start guide**, getting started with Composer **learning course**, and **best practices**.

9 **Building your first solution**

Whether you're new to Composer or already familiar with Conga, Composer Smart Start helps you build a solution from beginning to end. Check out the **full overview.**

10 **Get product assistance**

There are a breadth of resources available to help you get started with Composer, including our DocGen product experts. If you'd like assistance building out your first template or have further questions, contact our DocGen experts via the **Conga Customer Community Composer User Group** right-hand panel to get help.

03 | Getting Started

Basic Solution vs. Advanced Solution Chart

	Basic Solution	Advanced Solution
Users	Composer Admin	Salesforce Admin
Resources	DocGen team, Conga Customer Community, Customer Success, Conga Learning Center, product user groups, and Conga Services	DocGen team, Conga Customer Community, Customer Success, Conga Learning Center, product user groups, and Conga Services
Solutions	Use the guided document automation wizard and/or Composer quick starts that offer pre-built solutions	Utilize the solution manager that allows for more flexibility by letting you add solution components manually
Queries	Leverage the Conga query builder	Leverage Salesforce query tools
Merge Fields	Use the template builder to find necessary merge fields to pull data from Salesforce	Utilize special merge fields that include IF statements for dynamic conditions (example of **special merge fields**)
Templates	Use pre-built Conga templates from the template library or using a current template that needs minor tweaks	Build your template from scratch (PDF, Word, PPT, Excel, HTML) and upload it into Composer with major tweaks
Parameters	Leverage the **parameter guide**	Leverage the **parameter guide**
Buttons	Create a simple click-path by adding it to the page layout	Customize the button to create a specific UI by adding it to the page layout

04 | Conga Services

Your success with Conga is our top priority and we are committed to assisting you through your digital transformation journey. We know that your team has priorities outside of Conga; therefore, we provide a multitude of offerings to help fill gaps and support you while engaged in other projects.

Support

Conga Customer Community

The Conga Customer Community is your one-stop-shop for all things Conga including tips, user groups, knowledge articles, and more.

Click the "I'm interested" button on the right-hand side on the **Support** page to upgrade your plan.

We know how important it is for our customers to self-serve. By easily searching the Conga Customer Community, you will find multiple resources to help you get what you need. If you still have questions, we have several experts that can help.

The Conga Customer Community assembles and facilitates connections to knowledgeable Conga users and subject matter experts. Whether you are looking for ways to finish use cases or need help transforming your solution, Conga connects you with the right people through our product user groups.

Product documentation, knowledge base, and known issues are available to all community users. We encourage you to invite all Conga users to join, as Conga Customer Community users have unlimited logins. New users can register directly from the Conga Customer Community home page. If the user is an Admin who needs additional case and install center access, any one of your designated contacts can submit a case and add, remove, and manage their company's community member access. Review the difference between an **Admin/Super User and Login User**.

Technical Support

Conga Technical Support assists you with break/fix issues. Conga is a critical business application, and your company must choose the right level of support to complement your team and strengthen the stability of your Conga solution.

Initial response times are determined by case severity level and your support plan. Your experience is our top priority, and we strive to stay within your entitled initial response times.

The number of company support contacts (Admins) permitted on your account is based on the support tier within your contract. Most plans only provide support for break/fix issues for out-of-the-box functionality. Customized support is available with our highest-level plan.

Please consult your Account Management Team or Customer Success Team to ensure your **Support Entitlements** meet your business needs.

04 | Conga Services

Support

Customer Success Team

Conga's Customer Success Team exists to champion YOU, our valued customer. You have access to our full team of Customer Success experts who ensure you're getting the most out of your solution and that you have an advocate every step of the way.

Interested in adding a support plan? Head to the **Support** page in the Conga Customer Community to learn more or upgrade your plan.

Conga Customer Community Specialists
Provides support by answering general questions or concerns regarding your account. Submit a request via the **Conga Customer Community** 'Get help' wizard at the bottom of every page.

Customer Success Team
The Customer Success Team is a collection of product and business process experts available to help identify strategic business objectives, increase adoption, improve engagement, and achieve value-based success within the solution.

Maximizing the value of your Composer solution is a top priority, and, as product experts, we can review solution optimizations and provide additional insight into best practices, recommend standard processes, identify gaps, and uncover the health of your solution.

Review the **My Account** page in the Conga Customer Community to explore your dedicated Conga team and important contacts. You can also connect with Customer Success to receive assistance with product usability, tips and tricks, and escalations by submitting a request via the **Conga Customer Community** 'Get help' wizard at the bottom of every page.

Customer Success Programs
Conga's Customer Success Programs continue to evolve to better serve the best interests of our customers. Examples of our programming includes product/release webinars, customer-centric events, one-on-one work sessions, product guides and educational materials, and more.

04 | Conga Services

Training and Education

Conga Learning Center

The **Conga Learning Center** is where you can find all available training courses.

Interested in adding the Conga Learning Pass or Virtual Instructor-Led Training (VILT)? Click the "I'm interested" buttons on the Learning page in the Conga Customer Community.

Conga Learning Pass
A training subscription service organized around product, process, and role-specific learning plans and offers the ability to demonstrate proficiency through Lab Central and accreditation and certification achievements.

Virtual Instructor-led courses
Available if interested in an interactive, hands-on experience that allows you to train with experts in the field. While small, classes typically include different groups/businesses in attendance. Depending on the course, training lasts from 4 hours to a week.

Self-paced Training
Available for independent learners who have schedule flexibility.

Conga Product Certifications
Ensures optimal implementation and ongoing support of your Conga solution. Certifications can strengthen your team by having a Conga Expert.

Custom Training
Reach out to **training@conga.com** for custom training options.

Salesforce Admin Trailhead

Trailhead Courses
Salesforce Admin knowledge is required to operate Conga Composer. We recommend bookmarking **this trailhead module** to learn more to lay some groundwork for success.

04 | Conga Services

Application Managed Services (AMS) Packages

Conga Assist

Subscription offer for ongoing administration, maintenance, and enhancement requests for your Conga deployments. Conga Assist packages provide flexible access to proven experts that accelerate your success and maximize your ROI. Service request examples include maintenance and support activities, enhancements, customization support, and Conga administration.

Conga Architect

Subscription offer for best practices. This minimizes cost and maximizes scalability and solution performance. Types of requests include advisory and consultation, solution design, solution review, health checks, roadmap development, and adoption guidance.

Please contact your Customer Success Manager or **Customer Success Team** via the Conga Customer Community 'Get help' wizard.

Professional Services

Professional Services

Professional Services Full Engagement
Assists with projects of varying scope and provides end-to-end management. Contact your Account Executive for requests.

Professional Services on Demand (PSOD)
Provides an easy path to address your specific requirements without needing to engage in a full project. With PSOD, you choose the number of hours you need to address your specific business requirements without having to contract through a Statement of Work.

Health Assessments
Conducted by our Professional Services team if there is interest in identifying ways to optimize your solution. The health assessment provides a list of performance-enhancing recommendations and can be implemented by your team, Conga, or a third-party partner.

05 | Conclusion

We hope this guide provided a framework to plan, build, and execute against your organization's goals. Please do not hesitate to reach out to us if you need additional information to help get started with Conga Composer. We'd love your feedback that can be shared with your Account Management Team or the Customer Success Team.

Your success is our success!

Corporate Headquarters
13699 Via Varra
Broomfield, CO 80020
303.465.1616
conga.com

© Copyright 2024 | V1 | 0224