

conga



**EBOOK**

# The ultimate buyer's guide for IT leaders

Understanding document automation solutions

**Case studies included:**



## INTRO

In today's fast-paced environment, companies increasingly rely on technology to maximize business performance. As a result, IT teams are under constant pressure to select and implement the right tools to support secure, efficient, compliant, and cost-effective operations. IT leaders must also ensure their chosen solutions work together seamlessly—and improve the overall experience for users and customers alike.

That's why document automation stands out as a pivotal innovation. With document automation technology, IT teams can empower their organizations to automate document creation, streamline approval workflows, eliminate errors and inconsistencies, accelerate the revenue lifecycle, and elevate the customer experience.

That said, selecting the right document automation solution can be daunting. So we've created this quick and easy guide, to help you understand document automation and navigate the selection process more effectively.

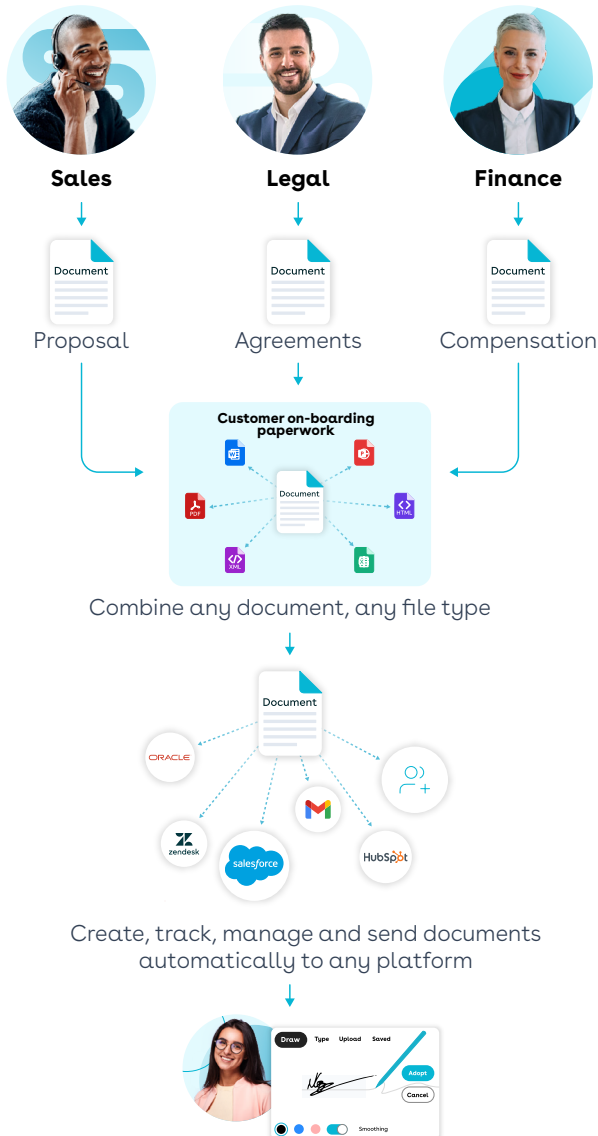
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## Understanding document automation and how it works

Document automation software is designed to streamline the creation, distribution, and management of document-based processes. This technology is ideal for optimizing business operations by minimizing manual labor and enhancing accuracy. The core components of document automation include automated document creation, digital signatures for swift approvals, automated approval workflows, and seamless CRM integration to ensure data precision.





## Document Automation use cases for IT:

The day-to-day use cases for document automation are practically limitless. Teams can generate secure, branded and error-free documents with just a few clicks, including:

- Proposals/quotes
- Contracts/agreements
- Invoices/renewals
- Customer communications

But that's not all, the power of document automation technology is that it can also ensure business-critical documents are automatically populated with accurate data, from any source. It can also deliver beautiful, branded documents to customers and prospects securely with a single click to realize revenue faster. Most importantly, top enterprise-grade solutions like Conga are easily scalable with seamless integration, allowing IT leaders like you to maximize your tech stack as your organization grows.



# 9 critical features of a document automation solution

Choosing the right tool for your organization will take time and careful consideration. Consider each team's needs and analyze how each feature will optimize your business operations—both now and in the future. To maximize effectiveness, your chosen document automation solution should include the following features:

## 1. Robust template library

Dynamic, customizable templates are the basis of document generation, allowing teams to quickly and accurately generate proposals, quotes, contracts, and more. Ensure the template library includes options for MS Word, PowerPoint, Excel, pdf, and html emails to address all your various use cases.

## 2. Branding control

Custom branding and rich visual elements take documents to the next level without introducing unnecessary risk. Automated rules around use of logos, images, tables, charts, graphs, and fonts ensure consistency and control.

## 3. eSignature capabilities

Built-in eSignature functionality reduces manual paperwork, allowing teams to easily create and send documents more efficiently— and securely collect signatures to realize revenue faster.

## 4. Automated workflows

Automating internal workflows can accelerate deal processes, eliminate bottlenecks, and reduce delays in decision-making—leading to increased business efficiency.

## 5. Seamless integrations

Connecting document automation with your system of record lets teams merge data from external sources and auto-populate documents with no manual data entry. Smooth integration with other common business tools (like CRM, CPQ, ERP, and email) helps to speed up the revenue lifecycle and deliver a seamless experience for customers.

## 6. Version control and audit trails

Tracking document changes throughout the document process creates a single, reliable audit trail to ensure compliance and transparency.

## 7. Centralized document storage

A single, centralized document repository ensures that every document is stored securely, yet easily retrievable when needed.

## 8. Analytics and reporting

Robust reporting features let business leaders monitor organizational performance, while deep, data-powered insights improve pipeline analysis and sales forecasting.

## 9. Easy implementation

Flexible deployment methods—including web, API, and pre-built connectors—ensure the solution can be installed according to your specifications. Your chosen vendor should also provide comprehensive implementation support to get end users started out right.

# Key benefits of document generation

In every company across every vertical and location, documents are the foundation of every stage in the revenue lifecycle. Document automation solutions are critical for streamlining document processes, because they provide significant benefits for teams across the organization—and positive impacts for the business as a whole:

## Greater efficiency

With automation, tedious, manual document creation tasks are replaced with efficient, intelligent workflows. Automation also eliminates bottlenecks in the approval process so documents can move through their lifecycle quicker.

## Increased sales team productivity

Reducing manual tasks frees up time so teams can focus on more high-value, strategic activities—like closing deals and serving customers. Automation also allows teams to handle a higher volume of work without increasing headcount.

## Improved accuracy and compliance

Document automation eliminates time-consuming and error-prone manual data entry, ensuring greater accuracy. And because documents are created using pre-approved templates, there's less risk of compliance issues.

## Enhanced customer experience

With document automation, teams can deliver a more cohesive, professional experience for your customers by ensuring that every document is accurate and prompt.

## Faster time-to-close

Automating document workflows accelerates the entire document lifecycle—from document generation through approval, signature, and delivery—so deals can close faster, revenue is realized sooner, and cash flow improves.

## Significant cost savings

Document automation can reduce labor costs by minimizing manual effort and eliminating delays associated with traditional manual processes.

## Deep, data-powered insights

Built-in reporting and analytics capabilities provide deeper insights into business performance, document process efficiency, and more.

## More secure, accessible documents

Rather than searching through physical file cabinets or individual hard drives to find a specific document, document automation software provides centralized file storage for easy accessibility and greater security.

# Choosing the right document automation solution

With countless document automation solutions on the market, selecting the right one can feel overwhelming. It's critical to ensure that your chosen solution aligns with your organization's unique challenges and objectives. Here's how:

## 1. Assess your needs

It may seem obvious, making the right decision requires you to first understand what you're trying to accomplish. What are your company's biggest pain points? What are their primary goals? Are teams struggling to manage a high volume of contracts? Are you simply looking to increase cycle speed or reduce overhead?

## 2. Ask the right questions

Software demos can be slick and flashy, so it's important to stay grounded and ask plenty of questions. As you evaluate different document automation solutions, make sure you get satisfactory answer to questions about things like:

- **Functionality:** Does the solution include all the key features discussed above (template libraries, customization, collaboration, reporting)?
- **Scalability:** Will the software scale to meet your needs as your business grows and becomes more complex?
- **Document control:** How much control do you have over aspects like versioning and access rights?

- **Compliance:** How does the technology help you comply with applicable standards and regulations? Are your documents protected and secure and can only be seen by the right people? Do they come with a full audit trail? Are they sent out on time to meet compliance needs?
- **Implementation and training:** What support is provided as you integrate the solution into your tech stack? Does your contract include user enablement and self-serve resources?
- **Industry experience:** How long has the vendor offered this type of solution? Do they have a successful track record working with companies in your industry?
- **Price:** Is the cost reasonable and competitive with similar offerings from other vendors? What is included in the price?

## 3. Evaluate integration and compatibility

Adding software to your tech stack is complicated, as its value will be severely limited if it doesn't integrate seamlessly with the other tools your team uses every day. Ensure your chosen solution is compatible with other key business technology like your CRM, ERP, email, and eSignature platforms.

## 4. Don't rush the implementation

Once your selection is made, consider piloting the solution with a subset of users before rolling it out to the rest of the team. This will give you an opportunity to gather feedback and make adjustments without disrupting the entire team's workflow. Lean on your vendor's implementation team for other best practices to follow during the implementation process.

**"We looked at other solutions, but Conga Composer was the best value and experience for our needs. Its adaptability and ease of use made it easy to create templates. It provides a really good internal user experience."**

**Rose Reynolds**

Senior Vice President of Operations

## **Business leaders implement document automation to drive real-world results**

These real-life customer success stories demonstrate the power of Conga Composer to reduce sales cycle times, improve proposal accuracy, and maximize scalability without increased operational costs.

### **Mitsubishi HC Capital America**

a growing commercial finance company, selected Conga Composer to automate its rapidly expanding document needs: creating system-generated documents, pulling data directly from Salesforce, packaging those documents, and sending them to clients instantly. With the help of Conga Composer, the company:

- Reduced document processes to a single click
- Replaced manual workflows with automation that dramatically increased efficiency
- Delivered documents to customers more quickly, increasing overall satisfaction
- Gained flexibility and scalability to quickly adapt as the business grows



## UnitedLex

a leading data and professional services company, chose Conga Composer to help them automate contracting processes, including proposals and quoting. By standardizing their contract templates, merging data directly from Salesforce, and streamlining approvals, UnitedLex was able to:

- Increase contract processing speed by 98%
- Increase revenue through auto-bundled sales packages
- Improve SLA compliance resulting in fewer penalties

**"Salesforce and Conga streamlined our quote-to-contract processes. We've increased speed, accuracy, and opportunity conversion while reducing risk."**

**Taylor Davis**

Senior Product Manager Sales Operations

**"Taking time-intensive tasks off an employee and allowing them to focus on that customer is always a net gain for us. Even if it's just a simple 15 minutes in your day that you've gotten back because of technology, you're able to make a phone call and check in on somebody. There's no value you can put on that."**

**Doug Richards**

Senior Vice President (SVP)

Chief Technology Officer (CTO)

## **Cooperative Finance Association**

a rapidly growing financial services firm, uses Conga Composer to streamline critical financial documents for their agricultural customers. With Composer, the company was able to:

- Increase efficiency for complex loan originations
- Improve communication speed by 50-100%
- Elevate human performance through automation
- Create a predictable, consistent workflow that will scale with the company

# Transforming your document processes with automation

Document automation can fundamentally improve the way your company operates. Not only does it optimize efficiency and growth, but it also delivers a positive return on investment—in the form of faster time-to-close and higher win rates.

Now that you have the information you need about this transformative technology, take the next step to choose a document automation solution for your organization. Conga offers best-in-class capabilities that include document automation—and beyond.

As the most popular document automation solution on the Salesforce AppExchange, Conga Composer is the clear choice for document automation to streamline business processes. With our solution, your teams can automatically generate error-free, on-brand documents, populate them with your data, and quickly deliver them to delight your customers every time.

Conga Composer has numerous competitive advantages, including:

- Multiple document formats for unlimited use cases
- Merge data from multiple sources into a single document
- Robust automation to simplify document processes
- Industry leading system security
- Unmatched scalability to grow with your business needs

You can use Conga Composer along with our other Revenue Lifecycle Management solutions, including CLM, CPQ, eSignature, and more—to help you build a seamlessly integrated tech stack.

[Schedule free demo](#)

## BONUS: checklist for IT leaders

This checklist provides a quick and easy reference guide for evaluating different document automation solutions.

Does the tool you're considering offer:

- **Customizable templates**
- **Workflow automation**
- **Integration capabilities**
- **Real-time collaboration**
- **Document tracking**
- **Version control and audit trails**
- **eSignature functionality**
- **Advanced data retrieval**
- **Automated data population**
- **Bulk document generation**
- **Custom branding**
- **Mobile and offline accessibility**
- **User permissions and roles**
- **Analytics and reporting**
- **Multi-language support**
- **Compliance and security features**
- **Document storage and search**
- **User-friendly interface**
- **Implementation support and training**
- **Ongoing customer support and resources**

## 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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