

Solve It Stories

Tales of Customer Success
from Our Partner:



**How Conga helped TouchSource reduce
quote creation time by 100%.**

The Challenge:

TouchSource creates innovative, user-friendly digital signage. These displays enhance communication, engagement, and wayfinding in office buildings, healthcare facilities, retail spaces, educational institutions, and more.

Manual processes for gathering account data limited its ability to move quickly. Admins had to manually run reports that sales reps then had to splice together, which pulled them away from revenue-generating tasks. Generating quotes was also inefficient. Limited customization options made it difficult to tailor proposals to each customer's unique needs. Lastly, the lack of an e-signature tool led reps to have to manually chase down signatures, resulting in significantly delayed deal cycles.

The Opportunity:

Organizations often need to streamline operations and reduce manual efforts in order to do more with less.

How do they ...

- Automatically pull customer data into their customer-facing documents and presentations?
- Tailor proposals to each customer's unique needs?
- Eliminate time-consuming and error-prone manual tasks?

In the case of TouchSource, it needed to leverage automation to increase the speed and accuracy of account data retrieval and enable flexible, customized quoting.



**By implementing
Conga Composer
and Conga Sign,
TouchSource transformed
its sales operations into
an efficient, data-driven
process, freeing up
valuable time for
strategic initiatives
and business growth.**

Anna Gofshteyn
Salesforce Administrator



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The Successful Outcome:

TouchSource can now use Conga Composer to send a customized quote with the right customer information, products, and pricing in seconds, all on a beautifully branded document. This allows sales reps to focus on selling rather than administrative tasks.

TouchSource's customers can use Conga Sign to immediately sign documents, with all data syncing back into Salesforce automatically. This cuts the quoting process down to a few minutes.

With Conga, TouchSource has significantly increased productivity, enabling teams to operate more efficiently and drive greater business impact.

This has resulted in:

1

month of time

per admin saved annually
on account reviews

100%

reduction

in time spent on
quote creation

80%

faster

new template builds

Considerations for technology companies looking to automate repetitive manual tasks.

- Automation is only as good as the data it relies on. Set yourself up for success by ensuring data accuracy before you embark on your document automation journey.
- Pair automation with AI to help sales teams work both faster and smarter. AI can improve decision-making and enable teams to anticipate customer needs. This elevates the customer experience and ultimately increases conversion rates.
- Choose a Salesforce partner that goes beyond implementation to offer long-term support. They can guide you with best practices, troubleshooting tips, and industry-specific insights whenever you encounter challenges or need adjustments. This will save time and money as your organization adapts and grows.

Learn more about Conga on AppExchange.

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