EBOOK

Seven ways to make your proposals work for you

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Proposals create the first impression

We all know the old saying, "You never get a second chance to make a first impression." Especially for sales, the proposal you deliver to a potential customer defines their first impression of your company. Sure, they've been to your website, read your content, and talked to your sales reps. But a proposal is the first deliverable you've prepared expressly to win their business.

But are your proposals working for you?

The difference between winning and losing in today's competitive business environment is your ability to quickly and effectively engage with prospective customers. Speed is the expected norm, and prospects won't wait months, weeks, or even days for a response to their requests. They want near-instant answers, and they know the technology exists for you to give it to them. If you can't, your competitors probably can. Prospects also expect accuracy, personalization, and content customized for their specific needs, business, industry, and use case. They want to be treated as the most important account in your world.

For proposals to be effective, they must give prospects everything they need and expect. For your sales team to be effective, they need the tools to easily and accurately put those proposals together, deliver them quickly, and do it from anywhere.

Here are seven ways to make your proposals work for you:

1 Put technology to work

Sales teams already use customer relationship management (CRM) technology to do more, do it better, and do it faster. It helps them manage and communicate with opportunities, but once it's time for a proposal, many sales teams are left to fend for themselves, using tools developed decades ago. That means cobbling together proposals from old templates, manually assembling product and pricing information, and doing their best to make it look presentable.

Doing it this way makes a win less likely, especially with the intelligent, cloud-based technologies available today. Your prospects want instant access to information, fast responses to questions and changes, and frictionless interactions that don't derail their own projects and processes.

Today's proposal generation technologies help sales build documents intelligently. They eliminate manual assembly, ensure reviews and approvals happen when needed, and shorten sales cycles. They also bypass the word processing, shared file, and email-driven processes of the past. They put your proposals in the cloud, enabling your sales teams to build and deliver proposals at any time, from anywhere, on any device. Internally, these tools also ease collaboration, allowing your employees to track and share content, while enforcing workflows.

2 Personalize everything

Businesses everywhere, of every type, are now offering hyper-personalized interactions everywhere you go.

Starbucks provides nearly limitless drink options, Amazon knows what add-on to offer after every click, and Spotify always knows exactly the right song to play next.

More and more, your prospects expect the same from you. They get it in all other aspects of their lives, and they want it in business interactions, too. That means your proposals can't be filled with generic, fluffy content pulled from old templates and copied from your website and collateral. They want a proposal that speaks to them, their challenges, and offers a solution for their specific needs.

By pulling data from CRM and marketing automation systems, and asking the right questions during assembly, sales can ensure that proposals always contain information that is relevant to each prospect and customer. The appropriate content is selected based on the prospect's individual business situation. By using logic-based rules for including or excluding content during the proposal creation process, the resulting documents contain the right messaging. And, everything is always up-to-date and accurate.

But personalization doesn't have to be cumbersome and time-consuming. Sales can pull from pre-built and pre- approved templates with proper branding and messaging every time, making proposal generation as easy as a few clicks.

3 Get—and keep—customers engaged

Reading about your solutions is fine, but to really elevate the customer experience, prospects need to interact with your message in dynamic and personalized ways. Some people respond better to words, others to interactive graphics, and some to a combination of images, words, and other formats.

To really win over prospects, the personalization effort has to target both the account and the individual decision-makers. People respond to seeing things in action and interacting with brands they might choose to do business with. By delivering proposals with high-resolution images and tables, you're giving those decision-makers the ability to choose how they interact with your business. It puts them in charge, encourages them to invest more time and emotion, and gives them a better overall experience with your brand and solutions.

Of course, sales teams aren't usually adept at graphic design and creating interactive documents. That's where modern proposal generation comes into play, with simple tools that enable anyone to build custom, dynamic, multimedia proposals from pre-built templates and content libraries. What's more, today's proposal generation tools enable sales teams to securely control access and track who views which content and when, enabling them to respond faster to prospect needs.

4 Improve accuracy

No matter how engaging your proposal is, with personalized, dynamic information that draws your prospect in, if the proposal isn't accurate, it won't accomplish your goal.

Inaccurate proposals have to be reworked, making your company look less than professional and slowing down response times—which makes it all the more likely your prospect will sign with a competitor. If errors come to light later on, they can interrupt your deal process or even worse. That's a misstep that's tough to overcome with a new customer.

When your proposal solution is linked to your CRM, and the data to build the proposal flows from your system of record, it's an easy way to be sure that pricing and customer data is accurate. There won't be any more pricing pulled from an outdated price book. Plus, overall data quality will increase when your reps see the benefit of inputting that data into Salesforce, since data upkeep will lead to accurate proposals that win them more deals.

5 Close deals faster

How you work with customers and prospects shapes their view of you and your business. Don't leave this collaboration to chance. Slow, siloed technologies can cause plenty of problems. But using bulky email attachments and overlapping "track changes" are a thing of the past.

Relying on antiquated methods can undermine your brand and message and signal that it will be difficult to work with your company. Not only will it compromise the customer experience, but it will also slow down your sales cycles.

We all interact with the web throughout the day, so we see how it can facilitate an easier experience and quickly deliver the content we seek. Prospects expect the same experience, and proposals are how you can demonstrate you can provide it.

But this isn't just a benefit for your prospects. It's also to your benefit to have more deals close faster, speeding up sales cycles and eventually bringing in revenue more quickly. There's another positive outcome to be gained, as well. When your sales team can generate accurate, engaging, perfectly formatted proposals in a few clicks, they have a lot more time on their hands to spend selling. Being able to generate the all-important proposal more quickly builds sales productivity and efficiency, which means your reps will have more time to cultivate relationships.

6 See who interacts, and when

Wouldn't it be great if you could see whether your prospects actually engaged with the proposal you sent, and when?

New proposal technologies can monitor who views your proposal and when they view it, helping you know which decision-makers are involved and when they've had a chance to look at the information you've sent over.

There's no more wondering if someone looked at a proposal and no more potentially annoying emails to ask if they've had a chance to view the content. Notifications let you know who has viewed a proposal and related content, and when they viewed it. This helps you understand how engaged prospects are, and provides a valuable tool in helping your sales team decide when to make that all important follow-up phone call or send an email checking in.

Competition today is fierce, and a fast turnaround might make the difference between a win and a loss. Having the opportunity to know when prospects dig into your proposals could be the advantage you need.

When T-Mobile for Business implemented Conga Composer for proposals, they saw a 25% increase in user adoption, and increased accuracy & consistency.

See the story.

7 Your proposals are just the first step

Creating and delivering modern business proposals gives your sales teams the efficiency, accuracy, and insights they need to close more deals in less time. With the ability to engage with prospects faster, more interactively, and in real-time, sales teams can focus on timely, informed engagement and give those prospects the attention they need to become customers.

Best of all, once you've automated your proposals and integrated them with your CRM, you've taken the first step in the larger process of transforming your commercial operations overall. With integrated, automated solutions, the data and signatures on your proposal can automatically flow into a quote, then a contract, and eventually into an invoice and a renewal. When you start by modernizing your proposals, you're taking the first step on the road to integrating and transforming all of your commercial operations processes. You're taking the steps needed to create an efficient, streamlined business ready to meet the requirements of today's prospect.

It might sound too good to be true, but it's not.

We know, because we're Conga, and we give our customers the power to deliver better, faster, more insightful proposals that clearly impact their business. But don't take our word for it; here's what a few of them had to say:

"Conga Collaborate reduced our proposal creation time by 50%. But more than time, it has created accuracy, which is more important to us."

- Jason Lakes,
Vice President of Sales
and Marketing, Renovia

"I don't think we could do our business without it. I really, truly believe that. We grew 35 percent year over year and I think a lot of that success revolves around the efficiencies that Conga has helped provide us."

- Chase Abbott,
Vice President of Sales,
Cox Automotive

"The platform's ability to do it all was one of the biggest selling points in our decision to purchase Collaborate."

- Erica Juhl,
Director of Sales Operations,
AllOver Media
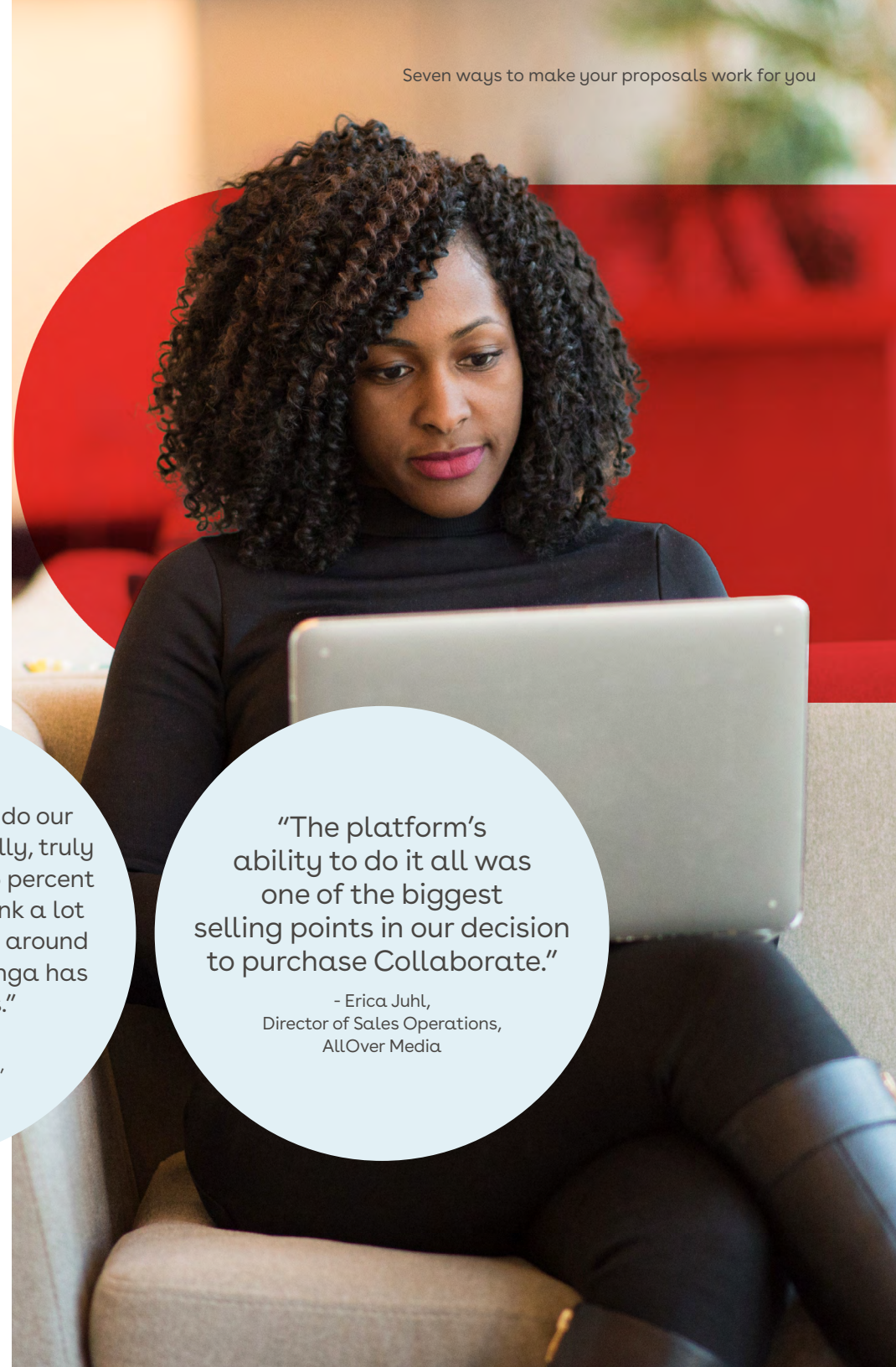
Get more from your proposals

To learn more about how Conga's document solutions can streamline sales proposals, **see for yourself what we offer** and how we help sales teams across the globe improve customer experiences every day.

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** for more information.

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