Conga Collaborate

Build and share online sales documents with ease

Close deals faster with streamlined document creation, sharing, and tracking

Working with traditional sales documents is slow, inefficient, and prone to errors. Conga Collaborate allows you to build beautifully branded digital proposals in a snap, using pre-built templates. Your engaging, interactive documents help grab attention with rich media and pull in the latest, approved content.

What's more, you can easily share documents with other stakeholders, collaborate in real-time with anyone inside or outside your company, and track how recipients engage with the documents you send. Get notifications of engagement and collect eSignatures—all leading to a faster sales cycle. Conga Collaborate integrates with a variety of CRMs for easy automation, and documents are safely stored in a secure cloud repository.

Challenges

- Creating business documents the old way is a slow, paper-heavy process
- Manual copying and pasting takes too much time and produces inconsistent results with numerous mistakes
- Documents are difficult to find and access once created
- Back-and-forth changes to a static document are time consuming, tedious, and increase sales cycle times

Key benefits

- Automatically create brand consistent, accurate documents with rich media content
- Send personalized documents via a secure link and track interaction to understand interest and follow up at the right time
- Receive real-time notifications and in-depth analytics on who is viewing the document, which pages they are looking at, and for how long
- Automate sales team processes for productivity gains and faster sales cycles

> " Conga Collaborate allows us to focus on customer-facing interactions as opposed to administrative work: more prospecting, follow-ups and customer touches. "
>
> Jason Lakes | Vice President of Sales and Marketing, Renovia

Software provider Dude Solutions accelerates sales proposal creation by 66% with Conga Collaborate

Powerful tools to accelerate sales documents

- **Template creation:** Build personalized documents using pre-built templates, correct content, and data from systems of record for speed and control.

- **Flexible data sources:** Merge data from external data sources such as an ERP, homegrown database, or multiple Salesforce organizations.

- **Custom branding:** Extensive brand control and management over emails, documents, and the application's user interface. Include tables, images, rich text, dashboards, custom fonts, dynamic formulas, and global currencies.

- **Sales content library:** Store and manage content with an unlimited content repository.

- **Recommended content:** Dynamically show or hide the right content by mapping to CRM fields such as the sales stage, industry, buyer's role, solution and usage, and business workflow rules.

- **Multimedia functionality:** Embed videos, online forms, and interactive content to improve customer engagement.

- **Multiple sharing options:** Email online documents as a secure, trackable link. Download as a PDF or Microsoft Word file. Manage shared email templates or create your own to follow up with customers.

- **Activities log:** Track activities, create follow-up tasks, save copies of output files, and update CRM and CPQ fields automatically.

- **Change tracking:** Request and approve changes to replace original text. Upload track changes and comments from Microsoft Word.

- **Version history:** See what changes have been made to a document and view or restore previous versions.

- **Document tracking:** Subscribe to conditional alerts about key deals. Get instantly notified when documents are viewed, by whom, and for how long.. Receive real-time notifications via text or email.

- **Reporting:** Access pre-built reports to gain visibility into deal status, document engagement, template effectiveness, content usage, and user activity.

- **Mobile capabilities:** Designed for tablet and smartphone use for mobile sales. Allows customers to review documents from any device.

- **Electronic signature:** Collect legally binding electronic signatures faster by allowing customers to sign from any device.

- **Internationalization:** The application supports multiple languages and currencies.

For more information

Email info@conga.com or call your local Conga office to talk to an advisor.

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Global offices

USA: +1 650 445 7700
APAC: +61 2 8417 2399
EMEA: +44 (0) 203 608 0165
India: +91 740 591 2515

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