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EBOOK

How to get management buy-in for a document automation solution

INTRO

If you've made it this far in your quest for a document automation solution, you already know that automating your business-critical documents can help you execute a successful day-to-day strategy by accomplishing more in less time.
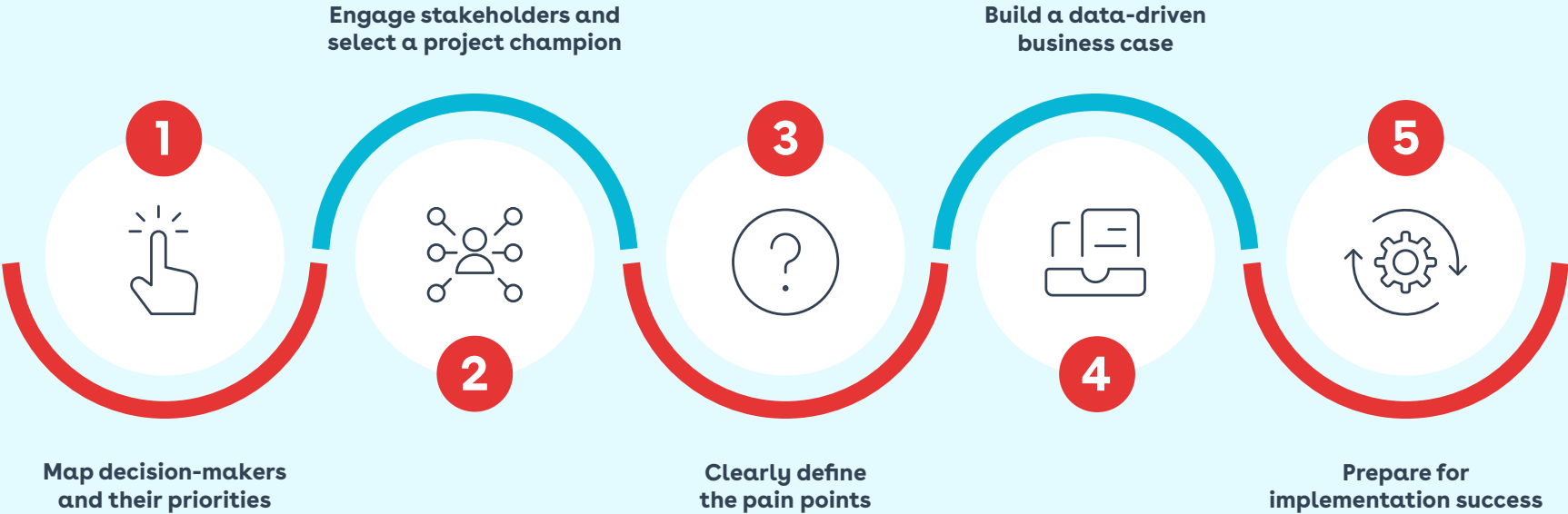
Technology changes so fast that it can be difficult to keep up, but that also means that there are more solutions available than ever before. As companies struggle to hit goals and impact revenue, many teams may find themselves working longer hours and taking on more work.

Implementing a document automation solution is a big investment—and company leadership may not fully understand the challenges your team is facing. So how do you get your managers to buy in on document automation?

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Milestone 1

Map decision-makers and their priorities

Understand whom you need buy-in from and their main concerns. Are you pitching to IT, finance, or operational leadership? Identify their goals and challenges, such as reducing costs, increasing efficiency, or ensuring compliance. Tailor your message to demonstrate how document automation addresses their specific needs.

Check out 12 benefits of Document Automation to dive into different challenges and solutions.

Milestone 2

Engage stakeholders and select a project champion

Involve the teams that will be affected by or contribute to the solution. Collaborate early to gather their input and secure alignment. Appoint a project champion from leadership who can advocate for the solution, act as a liaison, and reinforce its importance during decision-making.

Milestone 3

Clearly define the pain points

Document the key challenges you're solving. Common pain points include:

- Time wasted on manual document generation.
- High error rates lead to rework or compliance risks.
- Disjointed processes impacting revenue and team productivity.
- Inefficient use of resources across departments.

To dig deeper, take our pain point assessment.

Milestone 4

Build a data-driven business case

Use numbers to connect these inefficiencies to broader business objectives, like revenue growth, compliance, or customer satisfaction. Examples:

- How much time does your team spend creating or fixing documents?
- The error rate and its financial or reputational impact.
- Operational delays caused by slow document processes.

Articulate the costs of maintaining the status quo and how automation can resolve these inefficiencies.

Check out our customer success stories and the improvements they saw in their businesses.

Milestone 5

Prepare for implementation success

Anticipate challenges to ensure a smooth rollout. For example:

- Are integrations with existing systems (CRM, ERP) required?
- Is there bandwidth to support implementation?
- Are there any compliance or security requirements specific to your industry?

Proactively outline how to address these concerns, such as highlighting vendor support or planning for phased rollouts.

Project checklist

☐ Identify key leaders or team members who will be your decision makers

☐ Create a list of leaders' priorities that may affect their decision

- _____ what are their priorities:
  - ▪ _____
  - ▪ _____

- _____ what are their priorities:
  - ▪ _____
  - ▪ _____

- _____ what are their priorities:
  - ▪ _____
  - ▪ _____

- _____ what are their priorities:
  - ▪ _____
  - ▪ _____

☐ Identify stakeholders who will need to be involved through implementation

☐ Appoint a project sponsor and create a cadence for reoccurring discussions

- Project Sponsor: _____
- Meeting cadence: _____

☐ Create a detailed map of the problems your suggested solution could solve

☐ Conduct research to find legitimate data that will support your case (refer to key research and supporting data from Conga in previous section)

☐ Identify implementation challenges and potential solutions

- Consider teams/members that will be impacted by the new technology and those responsible for overseeing the transaction

☐ Compile your work into a pitch deck using Conga's template (refer to the pitch deck above)

☐ Schedule and rehearse your presentation of your findings and recommendations to your leaders (lean on your project sponsor for guidance and feedback prior to your formal pitch)

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Conga Composer

Streamlining document automation for faster revenue generation

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Conga resources

1. How digital document management can increase sales and revenue:
   https://conga.com/resources/blog/how-digital-document-management-can-increase-sales-and-revenue

2. What to look for in Document Automation software:
   https://conga.com/resources/document-automation-solution-ebook

3. Conga Composer data sheet:
   https://conga.com/resources/conga-composer-data-sheet

4. Conga vs. other Document Automation solutions:
   https://conga.com/alternatives/conga-composer-competitors

5. Composer accolades and customer reviews:
   https://conga.com/campaign/conga-composer-best-document-generation-software

Build and present your case

Once you have completed each milestone, you're ready to build your case for onboarding a document automation solution. For this step, Conga has created a templated pitch deck to help you prepare your presentation.

Pitch deck

You can use our templated deck to easily plug information into a presentation supporting your pitch for document automation. Make the deck your own, rearranging and deleting as necessary to customize the presentation. We've left several notes to help guide your case development.

Project checklist

On the previous page, we've provided a checklist you can use to ensure a robust pitch.

Conclusion

Don't waste another day on tedious, manual work. Start winning that time back! The right document automation solution can improve productivity for your entire organization.

Download the pitch deck

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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For more information

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