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The ultimate buyer's guide for sales teams

Understanding document automation solutions

Case studies included:

CFA

UnitedLex

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INTRO

In today's fast-paced environment, sales teams face a multitude of pressures to deliver results on a daily basis. They confront not only the traditional challenges of prolonged sales cycles, burdensome manual paperwork, and sluggish approval processes but also an increasing demand for greater accuracy and efficiency.

That's why document automation stands out as a pivotal innovation. With document automation technology, sales teams can automate document creation, streamline approval workflows, eliminate errors and inconsistencies, accelerate the deal cycle, and—most importantly—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. For sales teams, this technology is ideal for optimizing sales 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

Benefits of document automation

When it comes to revenue operations, documents propel each stage of the process forward, influencing every team and customer interaction. Document automation solutions can provide real-time notifications, tracking, and analytics with speed and accuracy. Other benefits of automation include:

Document generation use cases

The day-to-day use cases for document automation are practically limitless. Sales teams can leverage document automation to generate critical sales documents with just a few clicks, including:

- Proposals
- Quotes
- Order forms
- Renewals
- Invoices
- Contracts

- Work orders
- Monthly operating reviews
- Reports and charts
- Welcome letters
- Support case reports
- Pipeline reporting

But that's just the tip of the iceberg. They can also ensure those documents are automatically populated with the right data, from any source. And they can deliver branded, error-free documents to customers and prospects to close deals faster.

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9 critical features of a document automation solution

1. Robust template library

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

2. Customization

Take your documents to the next level with custom branding and rich visual elements like logos, images, tables, charts, graphs, and dashboards. Custom fonts and global currency ensure global accessibility for your documents.

3. CRM integration

Seamless integration with the CRM of your choice (like Salesforce) lets you merge data from external sources and auto-populate documents with no manual data entry.

4. eSignature capabilities

Built-in eSignature functionality reduces manual paperwork, allowing you to easily send personalized documents and securely collect signatures to close the deal faster.

5. Automated workflows

Automating internal workflows accelerates deal processes, eliminates bottlenecks, and reduces delays in decision-making. Real-time notifications indicate when a document has been viewed, by whom, and for how long.

6. Version control and audit trails

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

7. Version control and audit trails

Real-time collaboration and document sharing capabilities allow cross-functional teams to work together on the same document, at the same time.

8. Centralized document storage

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

9. Analytics and reporting

Robust reporting features let sales leaders monitor document progress, approval timelines, and overall deal velocity. Deep, data-powered insights improve pipeline analysis and sales forecasting.

Key benefits of document generation

In every company across every vertical and location, documents are the foundation of every stage in the sales cycle. Document automation solutions are critical for streamlining document processes, because they provide significant benefits for sales teams—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 the sales cycle quicker.

Increased sales team productivity

Reducing manual tasks frees up sales reps to focus on more high-value, customer-focused activities—like prospecting and closing deals. Automation also allows sales teams to handle more deals 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, sales 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 contract generation through approval and signature—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 sales team performance, document process efficiency, and more.

More secure, accessible documents

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

Choosing the right solution for your sales team

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

1. Assess your sales team's needs

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

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, etc.)?

- **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?

- **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 compatability

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. Get your IT team involved to make sure your chosen solution is compatible with other technology like your CRM, ERP, email, and eSignature platforms.

4. Evaluate integration and compatability

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.

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> "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

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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 sales teams with document automation

Document automation can fundamentally improve the way your sales team 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 sales team. 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 the sales process. With our solution, your sales reps 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

· Unmatched system security

You can use Conga Composer along with our other Revenue Lifecyle Management solutions, including CLM, CPQ, eSignature, and more.

Schedule free demo

BONUS: checklist for sales leaders

This checklist provides a quick and easy reference guide for evaluating different document automation solutions. Does the tool you're considering offer:

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

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

Email info@conga.com or visit conga.com