



Professional Services Solution Assessment

Increase efficiency and get the most value from your existing Conga solution



An independent assessment performed by Conga Professional Services QTC experts with unrivaled experience in the industry and our products provides a roadmap to increased usability, efficiency and ROI

Assessment Offerings	Description	Timeline
Level 1	Assessment of standard configurations, out of the box use cases and light customizations	2 weeks
Level 2	Above plus technical review of up to 3 customization use cases and up to 3 integrations, upgrade assessment	4 weeks
Level 3	Above plus technical review of up to 6 customization use cases and up to 6 integrations, upgrade assessment	6 weeks

Challenges

- New business needs and process changes not met in existing Conga implementation
- Expansion of the solution over time introduced performance or usability issues
- Lack of solution upgrade has resulted in inability to take advantage of new features and fixes
- Lack of product expertise in-house

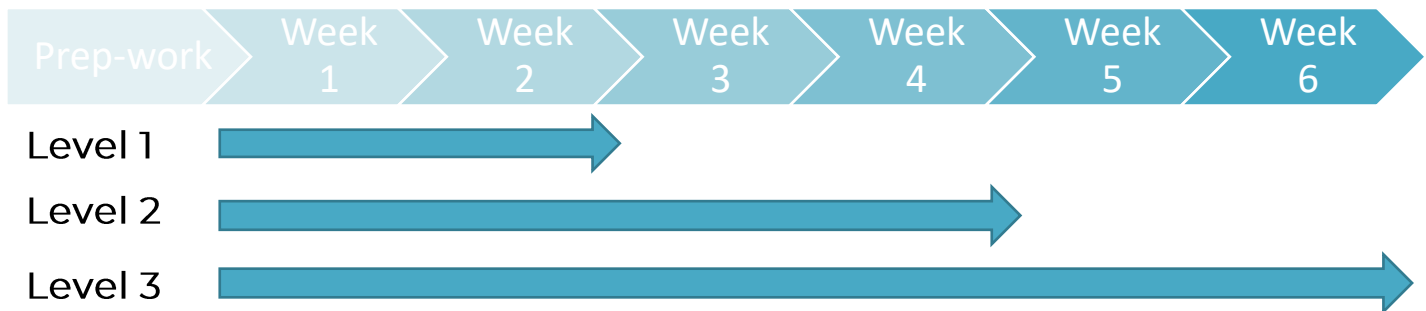
Key benefits

- Deep dive assessment (solution/technical)
- Identify process gaps, provide scalable out of the box solution recommendations and industry best practice guidance
- Proactive assessment of CLM/CPQ data setup and best practices to optimize performance
- New solution/features guidance and upgrade assessment and recommendations
- 1-1 consulting with QTC experts

“ The Conga solution assessment and deliverables provided the framework and justification to move forward with a larger Conga CLM strategy with stakeholders. It was exactly what I needed. ”

Eric F | Business Analyst, Clorox

Conga Solution Assessment Process



Customer preparation

- A solution assessment project is initiated based on a readiness review with the customer.
- A sandbox Org ID is required from the customer and a questionnaire will be sent to gather initial information to support the assessment workshops.
- Supporting documents that are required for the assessment are also defined.

Assessment activities

All levels

- The Conga Architect will focus on understanding the issues/challenges faced by the customer, specific areas of interest and identifying process gaps based on a demo performed by the customer through scheduled workshops.
- The Conga Architect will provide guidance and recommendations on the customer's data setup.
- A summary on meta data setup and recommended improvements to address challenges will be provided.
- 1 on 1 consulting sessions with the Conga Architect to deep dive into topics of interest and provide industry and Conga product best practices are performed through out the engagement.
- An upgrade assessment will be done on the environment and an upgrade plan and readiness report will be provided.
- Recommendations on taking advantage of our latest product features, innovations, and user experience improvements
- New feature demonstrations are conducted as applicable.

Levels 2 and 3 (in addition to the above)

- Deep dive solution review, technical review of configurations and integrations and custom code will be performed.
- Best practice recommendations to optimize performance will be provided.
- A focus and recommendations on reducing customizations will be provided.

Conga Solution Assessment Details

Activity	Level 1	Level 2	Level 3
Customer readiness	Included	Included	Included
End-to-end solution review with focus on solution assessment areas of interest to customer	Up to 2 workshops x 2 hours each	Up to 4 workshops x 2 hours each	Up to 8 workshops x 2 hours each
Review specific current issues and end user challenges	Up to 3 functional areas	Up to 5 functional areas	Up to 10 functional areas
1 on 1 consulting with Conga experts	Included	Included	Included
Future state planning	Included	Included	Included
Technical review of customizations and issues with recommendations on reducing customizations	Not included	Up to 3 customization use cases and 3 integrations	Up to 6 customization use cases and 6 integrations
Upgrade assessment and readiness review	Included	Included	Included
Deliverable			
Solution Assessment and Recommendations report and executive summary	Included	Included	Included
CPQ optimizer report (CPQ only)	Included	Included	Included
Technical Assessment and Recommendations report	Not included	Included	Included
Best practice recommendations for upgrade, new features, user experience, & performance tuning	Included	Included	Included
Hand off to Conga Service Sales for Proposal and budgetary estimate	Included	Included	Included
Duration of engagement	Up to 2 weeks	Up to 4 weeks	Up to 6 weeks

Conga can quickly assess the correct level of Solution Assessment needed based on your solution complexity to provide you the most value. Please contact Conga Professional Services at PS_SalesSupport@conga.com



For more information

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

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