

Conga Renewal Management

Proactive renewals
for long-term customers



Retain company revenue with an automated customer renewal process

The old saying that keeping a current customer is more profitable than acquiring a new one rings true; renewals are incredibly important to subscription-based businesses. Tracking, managing, creating, sending, and signing renewals is a process that you need to dial in to keep customers engaged and to curb churn.

Give your team, and your customers, the tools they need to make the renewal process efficient and simple. Automate the entire renewal process, from initial communications to reminders to document creation and sending, and even to getting final signatures. With less time spent on manual tasks, your team will have more time to spend on important sales opportunities with customers, including possibilities for cross-sell and upsell.

Challenges

- Lack of a standard process leads to late and missed renewals, causing contract incompliance, confusion, and frustrated customers.
- Using manual and repetitive tasks related to customer communications and renewal motions causes operational inefficiency.
- Managing multiple renewal records and data points means using several tabs and screens at once, which is inefficient and often inaccurate.
- Manual copy/paste methods on templates stored in personal folders or desktops lead to inaccuracies and inconsistent branding and messaging.
- Multiple approval steps slow down the renewal process as well as your path to revenue.
- Securing signatures the old-fashioned way costs time, money, and ink.
- A poor customer experience before and during renewal leads to churn and revenue leakage.



Benefits

- Establish a clear, automated renewal process through a single source of data to know exactly what renewals need attention and when.
- Easily view, manage, batch edit, and sort all your renewals on one screen.
- Automate renewal document creation processes to eliminate manual tasks and speed up business cycles. Get rid of errors, protect brand and corporate messaging, and increase accuracy and consistency. Send documents en masse or via an established workflow rule.
- Create automated approval steps across multiple stakeholders to streamline your renewal process.
- Sign renewals quickly and securely, saving costs and reducing risk, while delighting your customers with ease and efficiency.
- Create confidence and repetition by automating your end-to-end renewal workflow so your process is always consistent for internal teams and customers.
- Never miss an opportunity to engage with customers again, well before renewal. Establish a solid relationship, show how your products continue to help their business grow, and keep them as happy customers.

“**Conga is the gold standard in document generation for Salesforce and continually delivers for our organization.**”

Joe Fusaro | Director of Operations at RingLead

RingLead's business outcomes

- RingLead saves \$29,000 annually creating contracts and renewals with Conga.
- The RingLead sales and customer service teams save more than 530 hours, or 66 working days, per year on contract and renewal generation.
- The company also benefits from greater adherence to process, which is essential to maintain accurate Salesforce data, especially for a rapidly growing company.



A savings of
530+ hours annually



A savings of
\$29,000 annually

Streamline and automate your renewal processes to keep customers loyal and drive them away from your competition. Save your team time, create error-free, on-brand documents, and ensure a better experience for internal users and customers alike.

Our modular approach offers solutions to eliminate the renewal problem you're experiencing. Select the solutions you need now with the capacity to include others as you expand and grow.

Automate the renewal process

Conga Grid: Our productivity tool allows users to view, sort, and edit large batches of data from a single screen. When working on multiple renewals at once, cut down on 'clicks' and switching between tabs to find the information you need.

Conga Composer: Send consistent and personalized renewals that elevate your brand and delight your customers. Sales teams can easily create beautiful, accurate renewal documents using customized templates automatically populated with Salesforce data.

Conga Batch: Consolidate, schedule, and deliver the renewals you create with Composer using this add-on. Choose how you want to launch and send, whether automatically or on-demand, and do so for multiple documents at once.

Conga Trigger: Create and distribute renewals automatically from Composer and Salesforce—without having to click a button every time. Set up a workflow for creation and delivery and be sure your renewals get where they need to go, when you need them to get there.

Add eSignature

Conga Sign: Secure the signatures you need for your business-critical agreements. Speed up approvals, reducing the time to get to "yes" from days to minutes. Sign renewals quickly and securely, saving costs and reducing risk, while delighting your customers with ease and efficiency.

Advanced approvals and workflows

Conga Approvals: Enable users to set up approvals within your renewals on pricing, discounting, promotions, contract terms, agreement clauses, and more. Approvals combination of easy-to-use enhancements and detailed insight reduces manual intervention, providing a better user experience for both submitters and approvers.

Conga Orchestrate: Our end-to-end process automation tool allows you to quickly build and automate complex workflows in Salesforce for your renewal process. With built-in steps between manual and automated approvals, Orchestrate allows you to easily manage your workflow, gives you visual insights into where your renewal sits, saves a full audit trail for your records, and displays valuable data insights to identify common roadblocks and trends.



For more information

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