

The Conga logo, consisting of a red circle with the word "conga" in white lowercase letters.

conga



RESOURCE GUIDE

The quote velocity guide

How to handle high volume proposals
without adding headcount

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INTRO

In today's market, speed wins deals. But when quote volume swells, sales ops must keep up or even the hottest prospects will cool off fast. Unfortunately, high-growth teams often hit a wall when their bandwidth can't keep pace with surging quote volume. Manual processes that once worked smoothly begin to break down, leading to errors, misalignment across departments, and bottlenecks that slow the entire sales cycle.

These issues don't just erode internal efficiency; they also have a tangible cost. According to Forrester, 58% of B2B buyers say delays in receiving quotes negatively impact their purchasing decision. In a competitive market, the ability to deliver timely, accurate quotes and proposals can be the difference between winning and losing a deal.

58%



58% of B2B buyers say quote delays have a negative impact on their buying decision (Forrester)



**In this guide, we'll
provide the framework to
streamline and scale your
quoting processes—fast.**



Quote volume readiness checklist

Are you stuck in the manual quoting trap? Take this self-assessment quiz to see if your team is prepared to handle a significant uptick in quote volume.

- ☐ Do your sales reps build quote docs from scratch or using old templates?
- ☐ Do your quotes often contain mistakes and typos caused by manual data entry?
- ☐ Are your proposals routed manually for approval?
- ☐ Is your sales ops team bogged down in formatting and version control?
- ☐ Does your finance team frequently flag inaccuracies in your proposals?
- ☐ Is quote delivery often delayed more than 24 hours?

If you answered yes to three or more of these questions, you're a great candidate for quoting automation.

Anatomy of a high-velocity proposal process

Take a closer look at your current quoting workflows. The difference between outdated manual processes and an efficient, automated workflow is like night and day.

Manual quote workflow	Streamlined quote workflow
Sales reps format MS Word or Excel docs to create quotes	CRM triggers accurate, branded quotes from pre-approved templates with just a few clicks
Pricing information is input manually	Real-time data merge pulls pricing from your CRM or CPQ
Legal must approve every proposal	Business rules route only exceptions for legal approval
Quotes are sent by mail or email for customer approval	Quotes are sent for approval and tracked using an eSignature solution

Even if your current quote processes are completely manual, there are just four basic must-haves standing between you and scalable quoting speed:

- Standardized templates
- CRM- or CPQ-driven data merge
- Conditional approval logic
- One-click tracking and delivery

6 common workflow bottlenecks and how to fix them

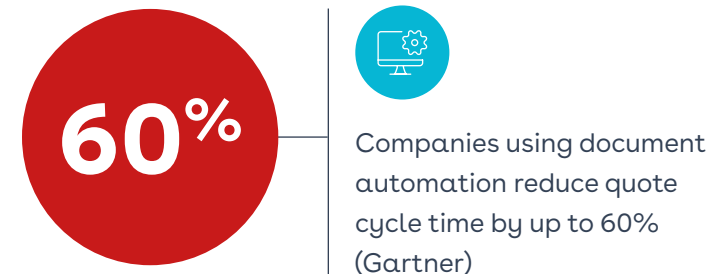
As businesses scale, bottlenecks in the proposal process can disrupt productivity, stall growth, and jeopardize deals. The good news is, these bottlenecks are usually fixable—with the right approach. But first you need to identify the friction points that are slowing down your quote velocity.

Let's take a look at the most common quoting bottlenecks and the best way to solve them.

Bottleneck	Solution
Manual document creation	Document automation technology connected to your CRM
Data entry errors	Unified data from a single source of truth used to auto-populate quote
Approval delays	Automated approval routing based on built-in deal logic
Custom formatting delays	Standardized templates with consistent formatting and branding
Slow, inefficient delivery	eSignature technology to send, track, and store quote documents
Physical signatures for proposal acceptance	Secure electronic signature capture

Document automation is the common thread to eliminate bottlenecks and accelerate the quoting process. Two powerful tools combine to provide a complete document automation solution:

- **Document generation** technology—like Conga Composer—lets you merge data directly into your quote documents from any platform you choose. Customizable templates make it easy to generate error-free, on-brand proposals with just a few clicks—and accelerate legal approvals with built-in workflows.
- An **eSignature** tool—like Conga Sign—gives you the power to deliver quotes instantly, capture secure electronic signatures, and store accepted quote documents for easy retrieval.



The 14-day quote velocity sprint

With the right document automation solution, you're just two weeks away from handling increased quote volume with speed, efficiency, and accuracy. Below we've outlined a 14-day sprint plan to help focus your efforts and achieve your quote velocity goals.

Week 1: Foundation

- Identify your most frequently used proposal templates
- Map current workflows for quote approvals
- Standardize branding and logic in Conga Composer
- Establish rules for deal logic and exception-based approvals

Week 2: Activation

- Configure automatic routing and eSignature with Conga Sign
- Train sellers on one-click quote generations
- Monitor changes in turnaround time and approval speed
- Roll out automation for second- and third-tier quote types



Engie Italia's high volume quote transformation

Engie Italia, a leading energy and utilities provider, was struggling with slow and fragmented quote processes. After walking a customer through their options, door-to-door reps would use their tablets to build custom proposals for things like smart thermostats, heat pumps, and solar panels. Generating a single quote took up to 20 minutes.

Once the customer agreed, reps had to print the document, capture a physical signature, and return to the office to manually scan the signed quote. The process was not only inefficient, but it also made it difficult to track what had been sold—introducing significant compliance risk.

After implementing Conga Composer, reps can now instantly generate an accurate, customized proposal based on the customer's selections. The customer can sign it on the spot and every quote syncs back to their CRM—no printing, no scanning, no delays.

Business impact:

- Quote generation time dropped from 20 minutes to less than 5 minutes
- 84% of quotes are signed—a massive increase in conversions
- More than 10,000 signatures captured monthly using digital workflows
- Seamless CRM integration for improved oversight and compliance

How **Conga** powers the proposal cycle

Conga's document automation helps you break out of manual quoting cycles, handle increasing quote volume, and accelerate quote velocity. With Conga Composer + Conga Sign, companies have the tools they need to:

- Pull real-time pricing data from your preferred system
- Automate proposal generation
- Streamline approval workflows
- Capture signatures to close deals quickly
- Deliver signed documents and store them for easy retrieval

→ CRM/CPQ → Composer → Approvals → Sign

DELIVERY

Conga Composer + Conga Sign are powerful individually—but together, they're unstoppable. Composer generates accurate, branded, personalized quotes directly from your CRM or CPQ, while Sign delivers proposals to your customers and captures secure eSignatures. Every document is audit-ready and instantly stored in a central repository. And with no bottlenecks to slow you down, quote velocity at scale is finally within reach.



Built to integrate.

Scaled for enterprise.

Trusted by 10,000+ global businesses.

Ready to start moving faster?

Follow the steps in this guide to get started!

- 1 **Analyze your current quote process.**
- 2 **Identify your biggest friction points.**
- 3 **Automate your top three quote types.**
- 4 **Test, measure, and expand.**

[Schedule a free demo](#)

See how Conga Composer + Conga Sign can help you increase quote velocity and handle high volume proposals—without adding headcount.

About Conga

Conga is the pioneer and market leader in Revenue Lifecycle Management. Its platform, the Conga Advantage 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, Colorado and has global operations in North America, Europe, Asia and Australia. Visit conga.com for more information.



For more information

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