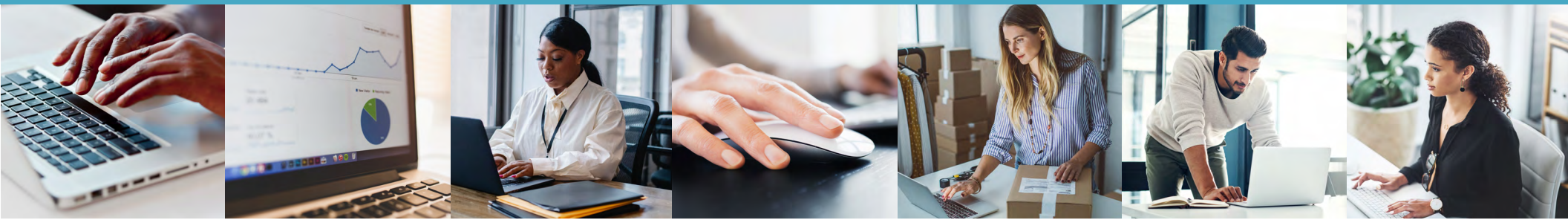


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EBOOK

# 7 steps to automate your revenue process





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# 7 steps to automate your revenue process

Sales teams feel constant pressure to increase win rates and accelerate revenue. To help them achieve more in less time, organizations have implemented technology solutions to speed up various aspects of the sales process. The sales process is an essential piece of a larger puzzle. Organizations that focus on digital transformation to help integrate and automate the entire revenue process will also see greater efficiency and success.

Simply focusing on technology doesn't provide an effective solution. Some parts of the process remain disjointed if organizations don't take the time to reconsider the process itself as a whole. When technology is simply applied to the same process that existed before, information can still end up in silos, making it hard for teams to access the most up-to-date data and impacting their ability to maintain consistent, reliable data throughout the process. Sales teams that are stuck manually toggling back and forth between applications, tools, and functions waste precious hours, leaving less time for actual selling. And the need for repetitive, manual data entry within multiple systems further reduces efficiency while increasing the potential for errors.

The sales process is too important to leave to manual effort, inefficient workflows, and the chance that critical information will get missed or go out incorrectly to prospects and customers. By automating the revenue process, sales leaders can create a

single source of truth, eliminate data silos, and boost accuracy. Automated processes also cut down on time, making tasks easily doable through intuitive workflows and just a few clicks. Most importantly, creating an efficient, integrated sales process helps connect the customer journey across multiple touchpoints, creating a better customer experience.

When teams can do more in less time and with less hassle, sales performance increases, leading to higher win rates and faster revenue attainment. In fact, automation has now become so important to the sales process that it's predicted to grow 115% between 2018 and 2023.<sup>1</sup>

As organizations implement digital transformation initiatives to improve their revenue operations overall and integrate their data and processes, they reach a greater level of digital maturity. Building the revenue process based on a single, cohesive data model and automating across all steps helps sales teams perform better and provide a more consistent, more streamlined experience for employees and customers, alike.

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## This guide will highlight seven steps in the sales process that sales leaders can automate to help their team:

- Gain much-needed visibility and insight into the customer journey and make improvements to the customer experience
- Increase productivity, efficiency, and accuracy by automating repetitive tasks and auto-populating documents with exact, up-to-date information
- Scale as needed without the worry that workflows and processes can't keep up



# 1 Quote and proposal generation

Sales teams need to generate on-brand, personalized quotes and proposals quickly and often, and they also need to make sure the information they contain is correct. But many sales teams are still creating proposals manually, and it's making them far less efficient and less accurate than they could be. When it's critical to make a good impression, they often end up falling short.

## Using Conga's automated solution gives you:

- End-to-end automated data retrieval and processes to increase accuracy and eliminate human error
- Easy send, receipt, and eSignature capabilities to enable a smoother proposal process
- The ability to merge multi-page proposals to simplify an otherwise complex process
- Consistent branding and templates for a professional look and feel



## Benefits to your business:

- **Earn time back for other tasks**

If you're stuck with a manual quote and proposal process, you know it takes time out of your day, and it's hard to set aside the hours when you have other, just-as-pressing responsibilities. Conga speeds up the quote and proposal process and makes it easier so you can focus more time on selling and customer engagement.

- **Increase accuracy**

Retrieving the right information to create a quote or proposal is difficult if you have to pull from multiple, disparate systems. Information may not be updated everywhere, if you can find it at all, leaving you to scramble to track it down and then wonder if it's accurate. Conga gives everyone on the team access to the same data that you can trust is up-to-date.

- **Modernize your proposal process**

More clients expect digital documents and processes these days. But if you're manually creating quotes and proposals, you may as well still be relying on "paper" to get deals done. Clients will know the difference. Conga gives your team modern, digital tools to satisfy customer expectations and stay competitive.

“Conga solutions have been critical in not just transforming our sales operations, but also in making our event sales teams substantially more effective. They now can produce quotes immediately, on site at events.”

Minus Tjeenk Willink | VP, AV Flexologic



## 2 Accurate forecasting and opportunity updates

Understanding future growth and identifying which qualified leads are likely to move out of “opportunity” and into the “customer” column helps sales teams make better decisions about where to direct resources and energy. But forecasting is dependent on up-to-the-minute data, and too often the data teams are using is poor quality or hard to manipulate.

### Using Conga’s automated solution gives you:

- End-to-end automated data retrieval and processes to increase accuracy and eliminate human error
- Batch and online editing of opportunities, contacts, and leads to save time
- Familiar Excel-like functionality so sales teams spend time making key updates, instead of learning a new tool
- The ability to update and manage records with fewer clicks, windows, and pages so you can get all your work done on one page



## Benefits to your business:

- **Increase efficiency and accuracy**

When the pressure is on to produce a sales forecast, the last thing you need is to spend a bunch of time trying to find and make sense of data that resides in multiple places. Conga provides one source of data truth that you can get to with fewer clicks to help you produce highly accurate forecasts in less time.

- **Gain a comprehensive understanding of sales activities**

No matter which method you use for forecasting, it's imperative that you understand the numbers top to bottom, inside and out. But this is difficult if you can't access or manipulate data in different ways. Conga makes it easy to gain insight into sales performance and daily activities, and segment data however you want for the most complete, detailed forecasting.

- **Improve collaboration**

When your whole team works together, overall sales performance improves. But when team members don't have access to the same data, it's difficult to sync up efforts and tackle big initiatives. Conga gives everyone on your team real-time access to up-to-date data so you can better coordinate and communicate.



50%

**of sales professionals now rely on data-driven insights to project numbers.<sup>2</sup>**





## 3 Contract negotiations and order forms

No matter how quickly and smoothly the sales process flows, one place where there is a much greater chance it will bog down is during the contracting phase. Once a contract is sent, it takes additional time for negotiations. Visibility into deal status can be difficult, version tracking can cause confusion, and the process overall can be slow and manual. Prospects can grow impatient and the deals that are otherwise ready to close can come to a screeching halt, complicating forecasts and slowing the whole team down.

### Using Conga's automated solution gives you:

- Automated data retrieval and single source for data and contract management ensure greater accuracy and faster overall sales velocity
- Terms & Conditions pre-approved by legal that sales can use in standard contracts reduce time spent in legal review
- Online redlining and negotiations to ensure correct versions and speed up processes
- Single-platform creation, negotiation, tracking, and eSignature capabilities to enable a smoother contracting process



## Benefits to your business:

- **Get greater visibility**

Knowing what stage a contract is in—still in negotiations or ready for signature—is essential to getting it over the finish line. If you can't see what's happening, you can't push to close the deal. Conga gives you a real-time view into all sales contracts so you know which ones need to be speeded along.

- **Improve the customer experience**

Just like with the proposal process, the contract process can either make or break your customer relationship. When would-be customers are sitting around waiting or are mistakenly sent a wrong version, they may rethink their decision. Conga gives customers a better experience by enabling a smooth, accurate contract process from start to finish.

- **See faster time-to-revenue**

Slow, manual contract processes trip up a deal just when you most need it to close so you can start seeing the revenue. Every day counts when profits are on the line. Conga helps teams wrap up a contract in days, if not hours, with quick, easy, automated contract lifecycle features.

“Using Conga Contracts to manage contracts worldwide, Qualcomm successfully eliminated several time-consuming manual processes, implemented contract lifecycle features, and increased accuracy of contracts.”

Lois Peterman | Functional Lead, Qualcomm



## 4 Signature execution

Capturing signatures quickly and efficiently is key to moving sales and other business processes forward. But done the traditional way, it's typically a resource-heavy, time-intensive chore that comes with a number of challenges, such as tracking signature status, authenticating signatures, and ensuring document security. The signature step shouldn't have to be the wrench in the system.

### Using Conga's automated solution gives you:

- A simple, modern eSignature tool built for Salesforce to integrate easily into your workflows
- Easy templating for all key business documents with integrated signature
- An automated, repeatable signature processes to cut down on time and resources spent
- An audit trail of all signature activity to easily track and keep the process secure and compliant



## Benefits to your business:

- **Streamline the signature process**

With so many devices, remote workers, and differing work schedules these days, it's hard to get the signatures you need in a manner that works for everyone. And your customers expect ease and efficiency. If you're still using paper documents with manual signatures, you're even less efficient. Conga streamlines the signature process for everyone involved—on any device, anytime, anywhere.

- **Speed up approvals**

Getting a signature seems like a simple step, but if a customer is distracted or busy with other things, sometimes it can take days or weeks. Conga makes getting approvals and final signatures simpler and faster, reducing the time it takes from days to minutes.

- **Authenticate and secure documents**

Even if you're already using an eSignature tool, making sure the right person signed the document, and did so securely, can still be an uncertain process. Conga's audit trail and secured PDFs allow you to demonstrate signature authenticity every time and validate any document, no matter when it was signed.



94%

of sales professionals that use eSignature increase their ability to identify the most profitable buyer profiles, customers, and accounts.

— Aberdeen Research<sup>3</sup>



## 5 Billing and invoice generation

Companies stake their reputations – and their cash conversion cycle – on accurate billing. But few things create more headaches for customers than billing errors, like incorrect pricing or payment terms and duplicate invoicing. Not only can billing problems damage the reputation of any company, but the inability to properly track invoices or follow up on payments can impact revenue and create more work.

### Using Conga's automated solution gives you:

- End-to-end automated data retrieval, templates, and processes to increase accuracy and eliminate human error—and get it all done faster
- The ability to batch-send multiple invoices to boost efficiency and improve velocity
- Templated for consistent branding, accuracy, and a professional look and feel
- Automated send, receive, and eSignature capabilities to enable a smoother payment process and keep the process secure and compliant



## Benefits to your business:

- **Get greater visibility**

If you have to manually track the status of invoices, it's all too easy to miss important details. With no real visibility into what's still owed and what's been paid, it's difficult to take appropriate action. Conga lets you see exactly where each invoice is in the billing cycle so you can follow up effectively and avoid lost revenue.

- **Increase accuracy and efficiency**

When you make a billing mistake, it can have an adverse impact on your organization's reputation. Customers don't want to work with a company that seems disorganized or indifferent to errors. If your billing is accurate, efficient, and quick, you'll make your customers happier. Conga lets you build, send, and log invoices right from Salesforce so all information is correct, updated, and tracked in one place.

- **Create faster time-to-revenue**

Dealing with missing invoices, late payments, or incorrect information isn't just a productivity killer, it also gets in the way of revenue attainment. It's hard to see the revenue from a hard-won deal get delayed because of an invoice issue. Conga keeps revenue flowing by ensuring invoices go out correctly, on time, and on a schedule that works for you.



44%

of businesses are looking to add automation to their payables processes to capitalize on efficiency and cost-cutting benefits, while also cutting fraud and increasing access to payment data.

– Business Insider<sup>4</sup>



## 6 Customer onboarding and statements of work

When a new customer is ready to be onboarded, there's often a flurry of additional documents that need to be delivered to them, everything from welcome letters to company guidelines to statements of work. But when these are created and sent one by one by different people in your organization, the disconnected process can greatly reduce efficiency, both for you and your customer. Plus, it's less than optimal for the customer experience.

### Using Conga's automated solution gives you:

- Automated data retrieval and processes to increase accuracy and eliminate human error
- Templates for consistent branding, accuracy, and a professional look and feel
- Easy send, receive, and eSignature capabilities for a smoother customer onboarding process and greater efficiency
- The ability to merge multi-page documents to simplify an otherwise complex process



## Benefits to your business:

- **Improve the customer experience**

Getting different documents from different people creates more work for your customers, since they have to spend additional time making sure they've received, signed, and returned everything you've asked for. Conga streamlines and consolidates documents, plus delivers them more quickly, making it easier for customers to receive, review, and deliver back to you.

- **Increase accuracy and efficiency**

Creating complex documents manually is inefficient and laborious, plus it often ends in mistakes being made. Sending the wrong document entirely, or the wrong version of one, is an embarrassing mistake that leads to unnecessary back-and-forth and wasted time. Conga lets you create, send, and track the most complex onboarding and other documents correctly the first time.

- **Improve collaboration**

When different members of different teams are interacting with the customer, it can lead to inconsistencies and confusion, especially if these teams don't have access to the same information. Conga gives everyone on your teams access to the same information and collaborate on key documents, so you can be sure all customer interactions are consistent and helpful.

“Conga has helped us uncover new opportunities to improve the efficiency of our internal operations and the way we communicate with the outside world. Without Conga, there's no way we'd be able to sustain the steady growth we've enjoyed each quarter for the last several years.”

Kevin Murray | VP of Marketing, Traction on Demand





# 7 Renewal management

The contract renewal step is critical to retaining business, as it presents a key opportunity to re-engage with the customer and ensure their satisfaction. But using slow, manual processes to manage renewals can lead to errors and prevents sales teams from being able to focus on customer engagement. What's more, without a standard process for renewals, the potential for late or missed renewals is high.

## Using Conga's automated solution gives you:

- Automated data retrieval ensure correct pricing and solutions, increasing accuracy and eliminating human error
- Automated send, receive, and eSignature capabilities for a smoother renewal process
- A view into all contracts up for renewal so nothing gets missed
- Templates for consistent branding, greater accuracy, and a professional look and feel



## Benefits to your business:

- **Get greater visibility**

Manually tracking the status of renewals is an inefficient, error-prone process that can lead to missed expirations and inaccurate contracts. Conga lets you see exactly where each renewal sits in the customer journey so you can follow up effectively and avoid lost revenue.

- **Spend more time with customers**

Customers need regular touchpoints to ensure their needs are fulfilled. If your team is spending all their time processing renewals rather than talking with customers, they're missing a valuable opportunity to nurture relationships and earn more revenue. Conga automates the entire renewal process so you can focus more time on effective customer engagement.

- **Create faster time-to-revenue**

Slow, manual renewal processes don't just create more work for your team; the time spent managing the process can also mean that renewal revenue gets delayed. Plus, automating renewals creates high renewal win rates and faster deal cycles. Conga's automated renewal solutions help you execute renewals easily so you can start seeing the revenue more quickly.

“With Conga Contracts, we can set date triggers that automatically generate and distribute reports to my field team about upcoming expiring contracts and background information so they can make sure the customer is satisfied and ready to renew.”

Nancy Thornsbury | Executive Director, Preferred Hotels



# Automate to increase win rates and earn more revenue

These days, sales teams aren't just competing at the level of product and service offerings. They're also competing when it comes to the ease and efficiency with which they engage with prospects and customers and can move them through the customer journey. Errors, friction, and cumbersome processes can turn off and even drive customers away, while poor-quality data and manual workflows can slow down deal cycles, waste precious time, and impact revenue.

## Automating your revenue process at every step enables you to:

- Eliminate manual effort and human error
- Standardize and streamline workflows to save time
- Rely on accurate, updated data that's accessible to everyone in real time
- Speed up document creation, approvals, and signatures
- Collaborate more efficiently
- Create a consistent brand message
- Improve the customer experience
- Gain visibility and insight into sales activities and trends
- Scale sales operations efficiently with less risk

With an automated revenue process, your sales teams will see improved efficiency and productivity, empowering them to execute sales strategies more effectively. When everyday sales tasks become easier and more efficient, with more accurate outcomes, your sales teams can earn higher win rates and accelerate revenue.

[Learn more](#)

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[1] State of Sales, Third Edition. Salesforce. March 2018.

[2] State of Sales, Third Edition. Salesforce. March 2018.

[3] Moravick, Andrew. "E-signatures & Sales Operations: A Catalyst for Competitive Improvement." Aberdeen Research. Oct. 2017.

[4] Toplin, Jaime. "Accounts Payable Process Automation Report: Technologies, market trends, benefits, and solutions of digitizing in 2020." Business Insider. Jan. 15, 2020.

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