



**LegalTech**  
**PUBLISHING**

IN PARTNERSHIP WITH  
**ABOVE  
THE LAW**

**LEGAL  
OPERATIONS:  
CONTRACT, AUTOMATION &  
ENGAGEMENT MANAGEMENT  
BUYER'S GUIDE: 2022 EDITION**



# Conga CLM Crushes Complexity within an Increasingly Complex World to Automate and Manage Contracts from Creation to Signing and Renewal

“Monitor every step from contract request to fulfillment and amendment to ensure all players stay informed, on task, and compliant with company policies.”

**Company Name Brand**  
Conga

**Conga Product Name Brand(s)**  
Conga CLM, Conga Contracts, Conga Contract Intelligence, Conga Contracts for Salesforce

### Latest Developments

- Conga Contract Intelligence (CCI) is a new standalone solution enabling users to leverage contract insights and act on critical dates, terms, and clauses to capture opportunities, meet obligations, control spend, and mitigate risks.
- Browser-based access for negotiators to review and edit documents in real-time with the Conga CLM platform using the X-Author for Contracts plug-in for Microsoft Word that integrates with Microsoft Office 365, providing the negotiation experience in Microsoft Word.
- The smart search engine supports natural language queries and concept searching.

### Roadmap

- Lightweight workflow with contract highlights and one-click approval.

- An intelligent risk management layer sits atop CCI's intelligent extraction, using semantic analysis with legal playbooks to define risks and present them in the user interface.

### Managing Contracts with Intelligent Automation

**Conga CLM** is an end-to-end contract lifecycle management (CLM) software designed to automate complex contractual processes, streamline workflows, eliminate errors, and accelerate time to revenue. Expedite contract cycles while reducing friction by giving the right teams access to the contract process at the right time. Monitor every step from contract request to fulfillment and amendment to ensure all players stay informed, on task, and compliant with company policies.

Conga offers four different CLM products to accommodate the needs of different customer segments. Examples include a sales department empowered to generate standard contracts within preset legal guardrails, a finance department having

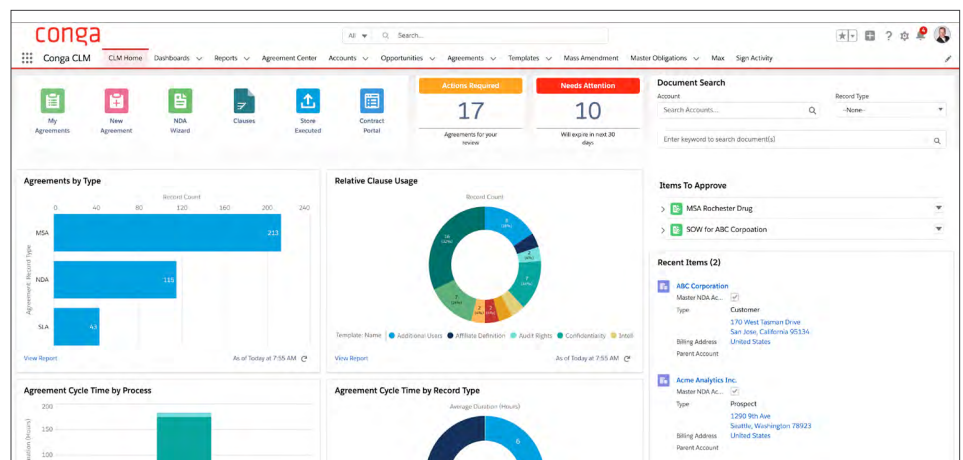


Figure 1: Conga's configurable and modern UI displays custom reporting, automatic and intuitive dashboards, and access to tools to create and manage contracts and tasks.

“ Conga CLM supports sequential and parallel reviews to ensure all invited parties provide feedback and proposed edits. Reviewers and approvers can use Conga’s X-Author for Contracts plug-in for Microsoft Word, which is now compatible with Microsoft Office 365 for real-time collaboration on documents, or the platform’s web browser-based experience to negotiate and approve suggested improvements.”

access to key contract data for accurate forecasting during the management and fulfillment of the contracts phase, a customer success team receiving proactive alerts on key renewal dates in order to renew and expand contracts with ease, and a legal team that can focus on negotiating and executing the more complex contracts. The products include Conga CLM, built for large, multi-departmental enterprise use with highly complex contracting needs; Conga Contracts for Salesforce, great for standard to high-volume contract generation and execution needs; Conga Contracts, made for single-department use with limited negotiation and approval needs; and **Conga Contract Intelligence**, that offers artificial intelligence (AI) and machine learning (ML) technology in each CLM product, and also a standalone repository for offering critical contract insights without the contract generation or negotiation needs.

CCI’s smart repository for legacy and signed contracts uses an ML process with Conga attorneys to verify and refine results for customers with high-level accuracy. CCI automatically categorizes documents into contract types, normalizes party names, warns of missing signatures, and extracts data (terms and clauses) from contracts to glean insights into key dates and obligations. CCI converts extracted text into actionable data, such as providing actual dates, even if they are vague and couched in text.

Conga’s CLM products leverage CCI’s underlying AI/ML technology to deliver functionality at the right place and time. For example, users can import third-party

or counterparty information into workflows with the key terms and obligations displayed up-front and apparent to reviewers and approvers.

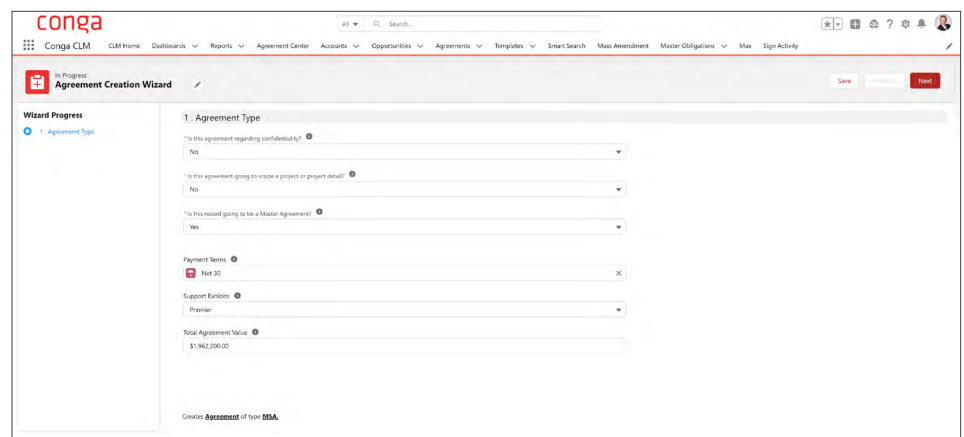
### Streamline Contract Processes from End-to-End

**Conga CLM** generates contracts from pre-approved templates and clause libraries (playbooks) and supports complex approval processes from contract requests through negotiation lifecycles and signature workflows. Customers can add contract sourcing, vendor registration, and contract performance functionality.

Users can create and manage contracts from a web browser in Conga CLM. The modern user interface (UI) features wizards to develop agreements, tasks that need your attention, and items to approve. *See Figure 1 on the previous page.*

Conga’s Agreement Creation Wizard guides users to build standard or custom agreements using natural language queries to narrow a document down to a contract type and display the corresponding data points and standard clauses. The wizard collects information from the user to fill out the contract with parties and required and optional clauses. The wizard creates a single record to store the agreement and everything about its creation and subsequent negotiation, approval, and signatures. Follow all your agreements in a customized Conga dashboard. *See Figure 2.*

In addition to creating a new contract within the system, you can also import a third or counterparty document. The import function can combine with CCI to



**Figure 2:** Users can leverage wizards to speed up and automate the generation of their contract.



“ Once a contract is signed and returned, Conga manages it for amendments and renewals. Users can amend the agreement based on the original record, allowing the user to make any changes as needed while reducing potential mistakes.”

automatically detect the contract type, fields, and clauses. After import, Conga creates the record and notes the data source to use as if it was your agreement to negotiate, approve, and sign.

After creating a contract from the wizard or importing one, send it to one or more parties for review. Conga CLM supports sequential and parallel reviews to ensure all invited parties provide feedback and proposed edits. Reviewers and approvers can use Conga's X-Author for Contracts plug-in for Microsoft Word, which is now compatible with Microsoft Office 365 for real-time collaboration on documents, or the platform's web browser-based experience to negotiate and approve suggested improvements. Counterparties do not need to know Conga CLM—they can use Word to negotiate a contract.

While reviewing a contract in Word or a web browser, some values and clauses are enclosed in text boxes, denoting "smart" areas. Fields and standard clauses in a record can be marked smart to track text when non-users negotiate a contract. Conga CLM recognizes the file when it comes back from a non-user, even if the filename changes and syncs data, regardless of Track Changes status. The system places the file back in the record

and notifies users who need to review and approve it.

Conga drives approvals via email messages. Customize email messages to include as much information as necessary and relevant to approve a contract from a message.

Conga creates a PDF file but maintains the DOCX version. Check it into Conga CLM after document review, which saves it as the next version to the repository. Synchronize data elements with the record and mark the document final. If you don't like any changes to the document, back it out, make changes, and mark it final again.

Use the PDF version to preview and tag the contract with Conga Sign. You can drag and drop signature and text boxes onto the document for all parties to sign. Once a contract is signed and returned, Conga manages it for amendments and renewals. Users can amend the agreement based on the original record, allowing the user to make any changes as needed while reducing potential mistakes.

Conga CLM views contracts in a hierarchy from inception to a signed agreement, amendments, and renewals. In a tree view, users can see all deals and how

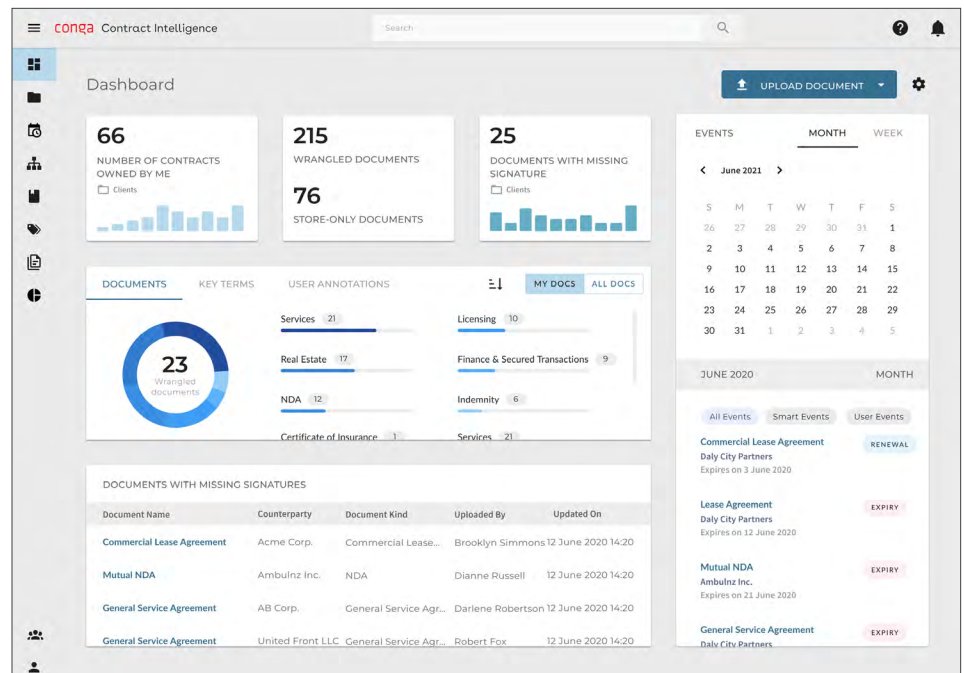


Figure 3: Conga Contract Intelligence infuses AI into Conga CLM to identify risks and obligations and present them in the UI to track and manage.

they relate to others, such as how master agreements relate to subcontract agreements in the system.

### Cloud Deployment and Integrations

Conga's CLM platform offers a multi-tenancy software architecture hosted in Microsoft Azure, Amazon Web Services, the IBM Cloud, and Force.com. Although Conga CLM is not a procure-to-pay system, customers can use the company's open application programming interfaces (APIs) to interface with Coupa, SAP Ariba, and more. Use [Conga Contracts for Salesforce](#) to automate transactional sales contracts; the company has a unique relationship with Salesforce, which resells Conga for its Lightning platform.

In addition to Conga's X-Author for Contracts plug-in for Microsoft Word, Conga provides another Microsoft plug-in tool named X-Author for Excel to sync data price books and other quote-related products. Conga also integrates with Microsoft 365 and Teams and has developed a virtual assistant for Teams and Slack.

### Reporting and Searching

Combining CLM data with CCI drives robust reporting and in-depth searching

across metadata and enables smart searches for keywords and concepts. With CCI, non-users or non-legal users who don't want to read through contract legalese can view the highlights. The add-on gives users what they need to know to manage renewals, obligations, risks, and more for contracts. *See Figure 3 on the previous page.*

### Pricing

Conga's per-user or seat-based pricing uses a transaction model for signatures or document generation. Conga has direct sales and works with certified channel partners and global system integrators, such as Deloitte and Accenture.

### Who is Conga?

Conga offers end-to-end revenue lifecycle management solutions for B2B clients around the world. Conga is the aggregate of two SaaS pioneers, Conga and Apttus. Conga was originally founded in 2006 to prove what was possible in the space of digital documentation, while Apttus was a leading innovator in quote-to-cash (QTC) solutions. In 2020, the companies merged to provide a complete product solution to manage the revenue lifecycle. Conga's solutions drive predictable business

growth by aligning processes, teams, and technology under a single data model throughout the revenue management lifecycle. These solutions enable Conga's 11,000+ customers to increase their win rates and deal sizes by 25%, close deals with a 32% compliance improvement, and increase sales revenue by 23%. Conga has 14 offices worldwide and is headquartered in Broomfield, Colorado.

### Why Buy Conga CLM?

- Conga automates and manages contracts from creation to signing, execution, and renewals.
- Create contracts from company playbooks or import them to manage through the negotiation and signing process.
- Conga's platform drives the contract review process using email, alerting reviewers of new versions and including customizable details in the messages.
- Conga Contract Intelligence helps companies gain actionable insights from contracts to manage risk, compliance, and obligations.

### Try Conga Today!

[See Conga in action — get a demo today.](#) ■

## Thank you for reading, let's keep in touch!

We appreciate the time you spent researching solutions for your law firm. New products, feature updates, and announcements happen throughout the year. So, to help you stay informed we have expanded Legal Tech Publishing's Buyer's Guide Series to include an eBook for nearly every product category. Subscribe to receive notifications when a new guide is released. Follow us on the channels below for updates and special virtual events.



Subscribe to our Vimeo Channel



Follow us on Twitter



Like us on Facebook



Follow us on LinkedIn



This buyer's guide is supported by vendor sponsorships. The products and services selected for the guide are done at the author's discretion. Reviews are also written to reflect the opinion of the author. Each product or service must first be selected for the guide, then invited for inclusion before sponsorship is requested. Additionally, emerging technologies who do not have funding to pay for sponsorship are included based on the level of value they offer to law firms. All sponsorship proceeds go towards the costs associated with the production and distribution of the guide.

[legaltechpublishing.com](http://legaltechpublishing.com)