The 7 must-have automated documents for business success

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Contents

Agility is a hot topic in today's business landscape, as speed and efficiency are the cornerstones of any successful organization. The truth, though, is most organizations don't move as quickly as they'd like--especially when it comes to sales teams.

Many companies have adopted technologies like customer relationship management (CRM) platforms, lead funnel strategies, and new communications tools to accelerate their operations. But they're frequently finding their approach still requires serious manual effort. Data is often stored in disparate, siloed systems, forcing users to scour multiple sources for the data they want and copy and paste into their document.

Even if it's all in Salesforce, crucial account data is spread across different objects—Accounts, Opportunities, Contacts, and custom objects—users must constantly toggle between different screens to collect the information they need. Sales teams, in particular, waste precious time and resources on repetitive tasks and manual data entry when preparing quotes, proposals, and contracts--so much so that sales reps spend only 33% of their time each day actually selling.

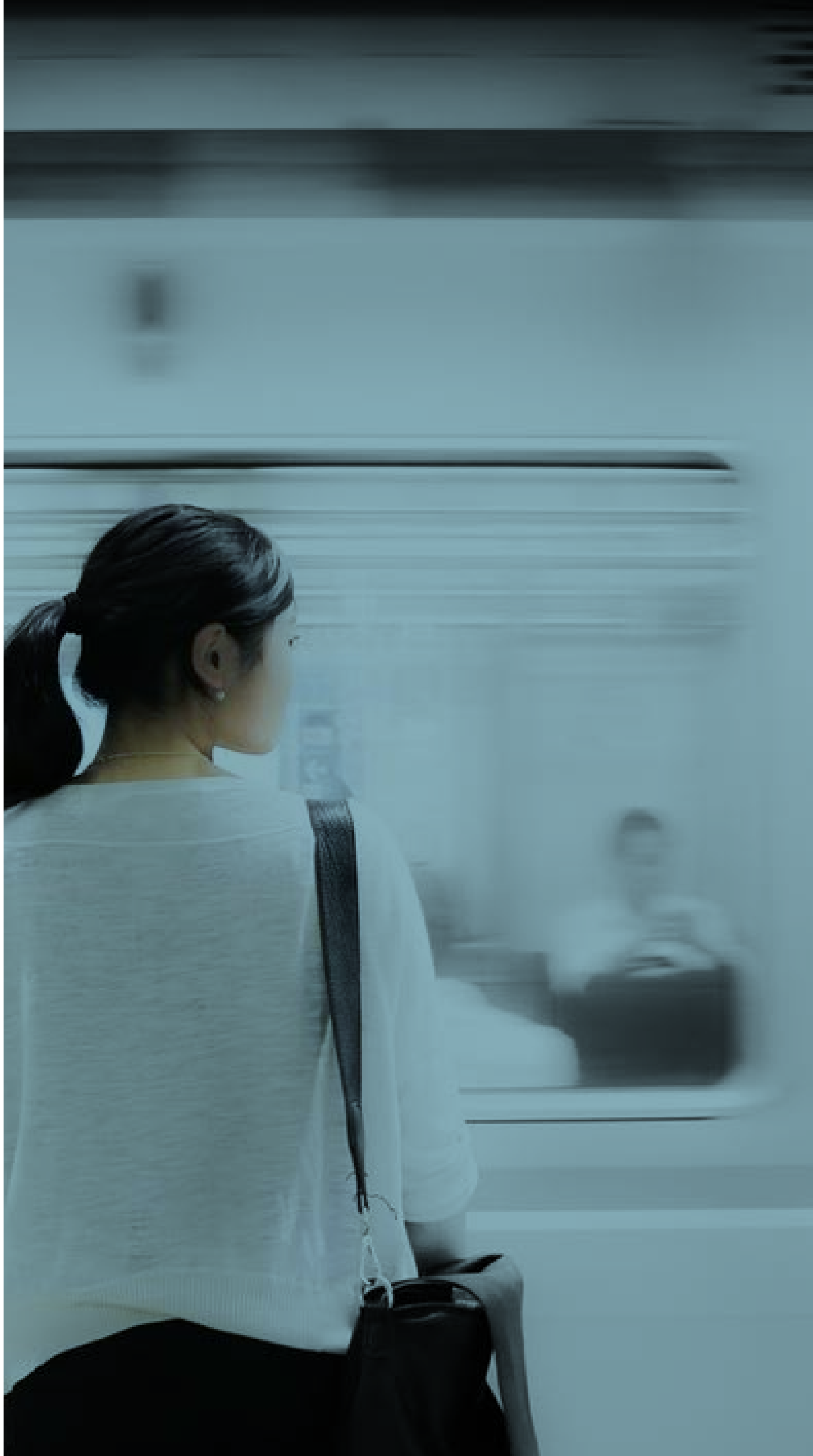
To combat these challenges, sales and other organizational leaders should consider document automation tools, which reduce manual work, improve data quality, and strengthen their brands. Automating time-and resource-intensive processes will allow their teams to work more efficiently, be more responsive to customers' and partners' demands, and gain a strategic advantage when it comes to winning new business and maintaining existing accounts.

This guide will highlight seven documents all organizations--regardless of industry, vertical, or locations--should consider automating to:

- eliminate time-consuming and error-prone manual data entry
- increase team efficiency, improve performance without requiring additional resources or expenses
- deliver an exceptional customer experience through easy-to-understand documents, faster negotiations, and a quicker path to adopting the products and services they need.

Automation can transform your organization into a more nimble, productive, and profitable engine. To get the greatest return on your technology and human capital investments, here's a list of seven essential documents to automate for the greatest impact on your sales velocity and team performance.

1 State of Sales Productivity Report. Docurated. 2015.



Pipeline Reports and Opportunity Reports

Clear and accurate reporting is an essential part of the sales toolkit. Managers and executives need to understand the sales pipeline to properly align resources. They need insights into sales performance and trends—whether it's segmented by rep, lead source, territory, or industry vertical—to make quick decisions and meet growth goals.

Most sales organizations aren't meeting this need, evidenced by the fact that over 95% of sales managers have tools in place to gather insights into their team's activities and performance, but only 35% say the process works seamlessly. That leaves 61% of managers who are collecting the right data, but are not getting the reports they need.

61%

of sales managers have trouble gathering insights into current opportunities

(Source: Sales Engagement Platforms Are The New Frontier Of B2B Selling. Forrester. 2017.)

1

Why automate?

- **Remove reporting roadblocks**
  Built-in or out-of-the-box reporting capabilities often have data source limitations, making it extremely challenging to report on information that resides across multiple objects.

- **Share the (data) wealth**
  If data is the lifeblood of an organization, then sharing that data effortlessly with both internal and select external stakeholders is critical to success. Many dashboards only offer visibility for internal audiences. If you need to share them with anyone who isn't an authorized user of that particular system, you're stuck.

- **Stop wasting time on formatting fixes**
  Putting together a beautiful, presentable report—for executive or board reporting, for example—means your sales admin or business intelligence (BI) team will spend hours exporting data, editing it, and formatting it in Excel or PowerPoint.

How does it work?

- **Set it and forget it**
  Schedule automated recurring reports to send to anyone inside or outside of your Salesforce organization. Combine data from multiple disparate objects into one clean report—and do it just once, then let automation take over the daily, weekly, or monthly sends.

- **Customize content by recipient**
  Build and schedule a single report, but use dynamic content settings to ensure recipients only receive the subset of data they need.

- **Make it appealing and easy to read**
  Use fully formatted document templates, including charts, tables, graphs, hyperlinks, and images, and even customize the HTML email that carries the report to include background, instructions, or anything else you might need. Your templates will enforce consistent, professional branding on all reports.

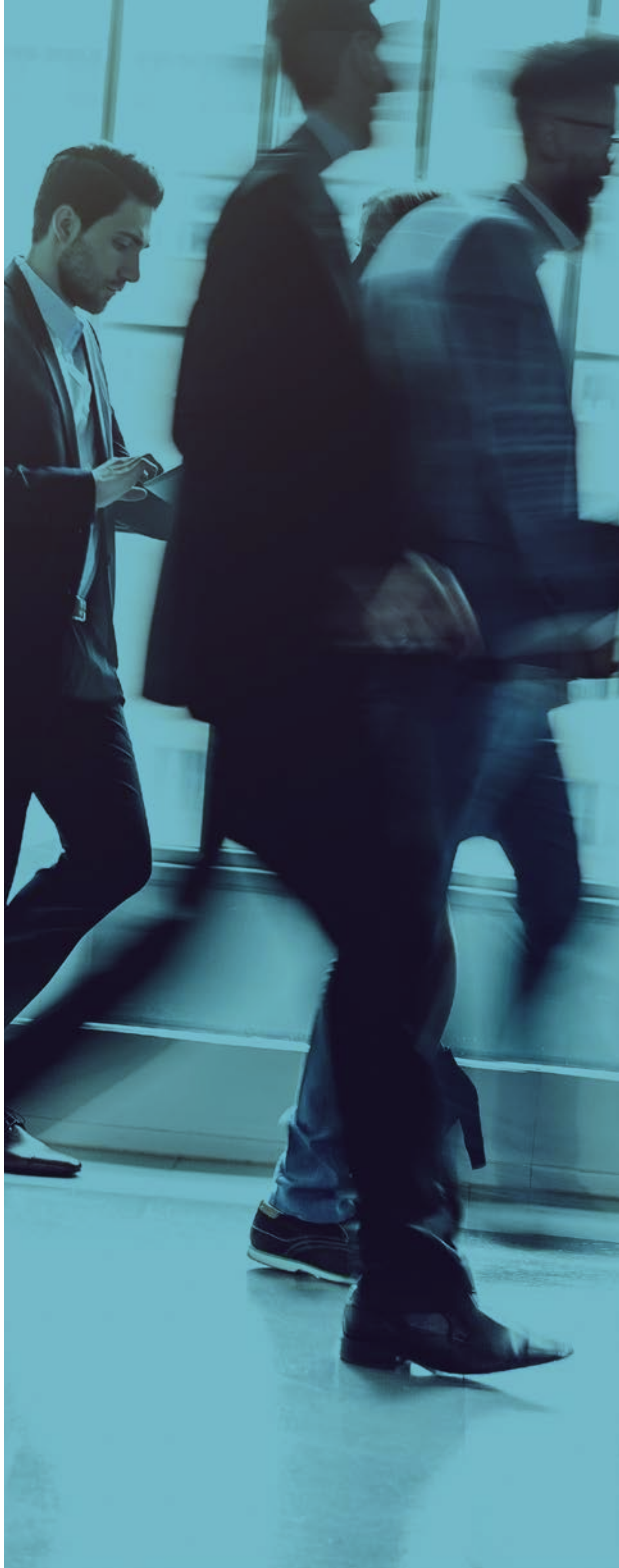
Key considerations:

- **What reports does your team need, and who needs them?**
  Work with sales management to identify areas where they'd like to make better data-driven decisions. Determine stakeholders inside and outside of your organization who need access to performance insights.

- **Where is the data stored?**
  Some data is stored on single Salesforce objects, like simple lead data, while other data is stored across multiple objects, like pipeline engagement data that is spread across Accounts, Opportunities, and Contacts. What data is currently most difficult for your team to access, and where is it stored?

- **Which data is aggregated?**
  Essential data can live in a number of different systems. Identify data stored in enterprise resource planning (ERP) systems and other sources outside of your CRM that could add value to your documents.

- **What output format should the data be in?**
  Different chart types will more clearly visualize different types of data. Work with stakeholders to understand their needs and preferences.



Sales Engagement Platforms Are The New Frontier Of B2B Selling. Forrester. 2017.

Quotes and Proposals

Quotes and proposals can be a major time suck if they're still being produced manually. Sales reps have to repeatedly copy and paste data from Salesforce into templates, creating many opportunities for errors like using the wrong template or source data. This can result in having to start from scratch with a new document delaying delivery of the proposal and giving prospects plenty of time to lose interest, or continue to research other options.

When it comes to proposals, document automation doesn't just save time, it closes deals. In fact, a majority of sales organizations can improve their close rates simply by automating their proposal process.

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Over 50%

of sales organizations have improved their win rate by automating their proposal process.

(Source: 2017 Proposal Automation Market Pulse. Qvidian. 2017.)

Why automate?

- **Save time and resources**
  Sales reps shouldn't waste their time on monotonous administrative tasks. Sales organizations need a faster, simpler way to send sophisticated formatted quotes and proposals.
- **Stay on-brand**
  Quotes and proposals should be considered marketing tools, with brand consistency as a necessary baseline. Many systems enable quote generation in PDF, but creating templates that incorporate perfectly formatted, charts, tables, and even images to generate quotes in a range of formats will help put your best foot forward.
- **Keep track of everything**
  Every version of a proposal or quote should be tracked. Sales management can use data insights to understand and improve sales process elements like standardized terms and pricing, and service teams can access accurate information when questions arise.

How does it work?

- **Generate quotes faster than you can say "generate"**
  Administrators set up fully customized document templates, which sales reps can use to generate and send quotes or even generate and send batches of documents with a single click.

- **Put your best foot forward**
  Administrators and marketing teams can tailor templates visually and map Salesforce fields with easy-to-use template customization interfaces. Content is dynamic, and entire sections can be included or hidden based on any information in Salesforce—deal size, rep role, account location, industry, or anything else your organization uses to segment quotes.

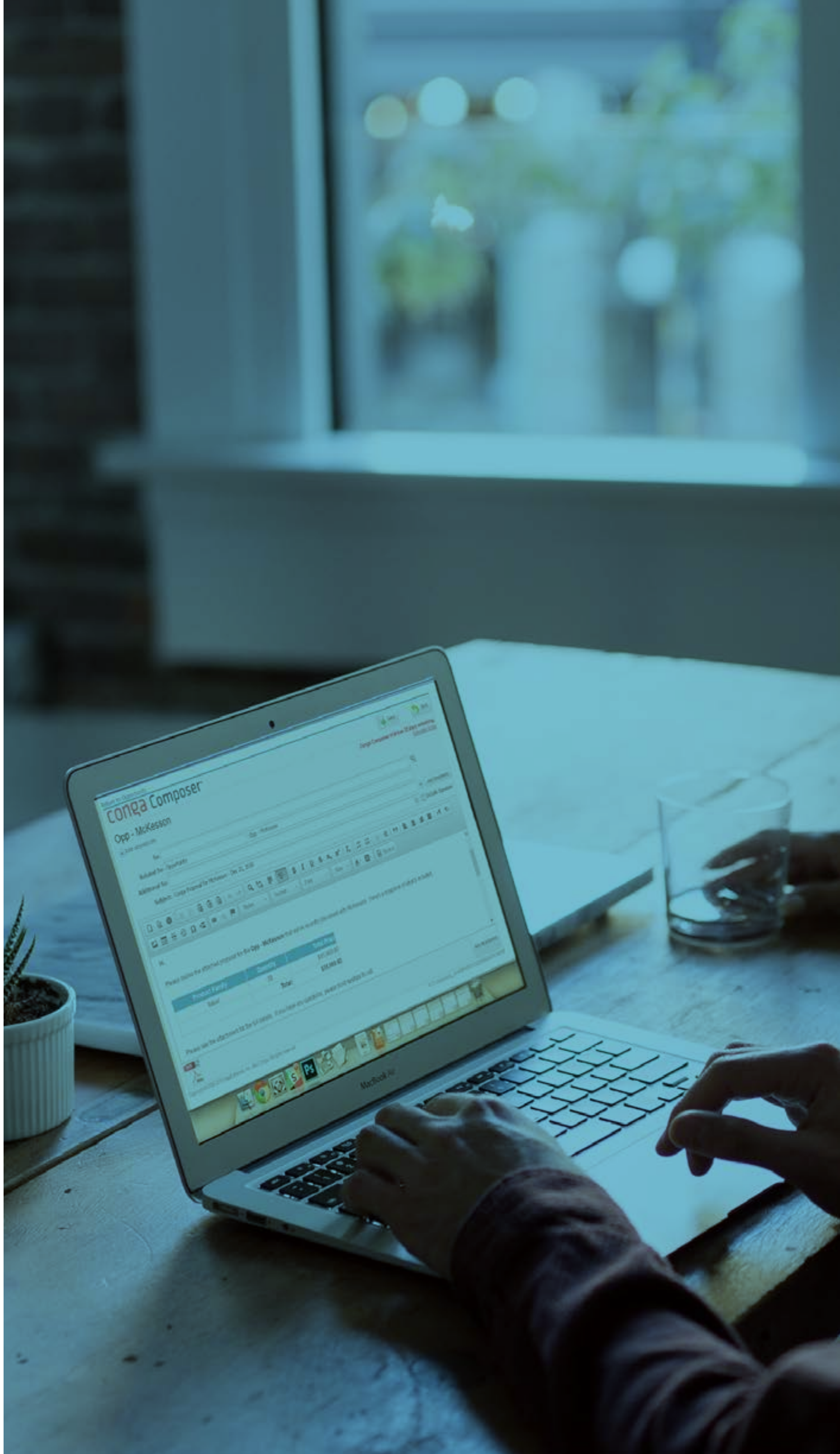
- **Get it right the first time**
  Automation and standardization ensure sales reps never send an inaccurate quote again.

Key considerations:

- **When in your sales process are quotes and proposals generated?**
  Consider what information needs to be collected before a quote can be generated, and how and when that information is collected.

- **How complex are your quotes?**
  Dynamic formatting, such as grouping products by product family, may require technical skills including SOQL query-writing. More straightforward templates can be built using simple drag-and-drop tools.

- **What templates do you need?**
  Sophisticated data automation tools reduce administrative burden and redundancy by allowing you to show or hide content based on business rules. Users don't need a different template for every business case anymore, so the total number of templates can be reduced to the minimum. Administrators spend less time managing and updating templates, and sales reps spend less time scrolling through endless lists to find the best one to use.



Contracts

No one likes waiting. Yet, on average, it can take companies up to a month to create and approve a new contract. Will your prospects wait around patiently during that time or will they grow frustrated with the timeline and reconsider their investment?

Fact is, vendors who meet and exceed the expectations they've set for prospects and clients are likelier to win and retain the business. Providing buyers with fast, efficient, and error-free delivery of documents creates the foundation of a long-term, mutually beneficial relationship. Yet, for most sales organizations, contract preparation and approval is like quicksand, sucking up productivity gains and slowing down deals that are otherwise ready to close.

3.4 Weeks:

the average time required to create and approve a new contract.

(Source: Contract Management Statistics for Sales Leaders)

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Why automate?

- **Accelerate and simplify**
  Instead of taking weeks, sales reps should be able to conclude contract negotiations in days, or even hours.
- **Reduce back-and-forth with legal**
  If reps access versions of your Terms & Conditions your legal team has pre-approved and are available for every deal, they won't have to wait for approval on standard changes.
- **Stop scrutinizing versions**
  Reading through redlined contracts takes time and effort, and it's easy to miss minor changes. Reps need a simple way to compare versions of a document and submit redlining requests.
- **Track the important stuff**
  If important terms like contract length, payment information, or signing bonuses change during negotiation, the rep might not re-enter the new terms in Salesforce. That critical information is then essentially invisible when it's time to provide support or renew the contract.

How does it work?

- **Generate contracts with a single click**
  Generating a new contract can be a simple, one-click process, just like generating a quote or proposal.
- **Manage standard terms and conditions**
  Standard terms and conditions are stored in a clause library, so reps can swap out pre-approved terms as needed. Basic changes take seconds, not days.
- **Keep track of every version**
  Document versions and related emails are automatically tracked, reducing error and saving time.
- **Redlining made easy**
  Redlining tools track the changes a prospect made in Microsoft Word (whether or not they tracked changes), allowing simple one-click versioning, edits, and approvals right from Salesforce.
- **True-up for accurate reporting**
  True-up tools identify any accepted changes that correspond to merge fields in the original document, so important changes can be synced back to Salesforce where they are available for reporting, customer service, and account management.

Key considerations:

- **What are your different contract templates?**
  Dynamic formatting allows contract sections to be shown or hidden based on Salesforce fields. Similar templates can be grouped into simpler automated templates, cleaning up your template library and simplifying maintenance.
- **What terms and conditions are you regularly using?**
  If there are multiple standard versions of particular contract terms, they can be reviewed by legal and saved in a pre-approved clause library to save time and unnecessary approvals during contract negotiation.
- **What information needed in the contract is already stored in Salesforce?**
  The more information that can be mapped from Salesforce fields, the faster the contract can be completed. Field changes can also be tracked back to Salesforce using the True-Up feature, to ensure accurate reporting.

Smith, Pierce. Contract Management Statistics for Sales Leaders. 2014.

Account Plans

Whether your company currently develops detailed, multi-page strategic account plans or simple tactical one-pagers, account plans help properly align all the stakeholders who need (or want) to be involved in an account. Successful teams have found with a solid account plan, they're 29% more likely to identify new business opportunities and 55% more likely to produce new revenue growth. Account planning gets everyone on the same page and focuses everyone's efforts, maximizing the value of each interaction with the client.

Sales teams can increase win rates by up to 50% when they apply a customer-centric approach to account planning management.

(Source: "The best approach to strategic account planning." CSO Insights. November, 2016.)

4

Why automate?

- **Gather all the information you need**
  One of the primary challenges in account planning is putting together the right data. If the data is in Salesforce, it often lives on multiple objects, spread across multiple views. Reps waste time drilling into different records, and it takes significant manual effort to prepare or update a plan.

- **Reduce error**
  With a manual process, changes have to be double-entered in Salesforce and the account plan document, then the document has to be redistributed to all the involved parties. It's too easy to lose track of versions or make mistakes updating different documents.

- **Don't lose track of the important stuff**
  When new information comes up, like new requirements, deadlines, or KPIs, it's often entered directly in the document and never makes it back into Salesforce. When it's time to renew the contract, your team is missing key information.

Schultz, Flaherty, Cluytens, and Jones. Top Performance in Strategic Account Management: Benchmark Report. RAIN Group. 2015.

How does it work?

- **Centralize the database, not the document**
  Reps should enter all information directly into Salesforce to ensure the "source of truth" — the CRM database — is always up-to-date so that live information is exposed to account and service teams.

- **Get today's information in today's document**
  Collaborators can update the source information when they learn something new, and reps can generate a new version of the account plan with a single click. Each version of the account plan uses real-time data from multiple disparate objects, so no one has to waste time clicking through different lists and records.

- **Design the perfect document**
  Templates incorporate key data with polished, on-brand formatting, in your preferred output format: PDF, Word, PowerPoint, and more.

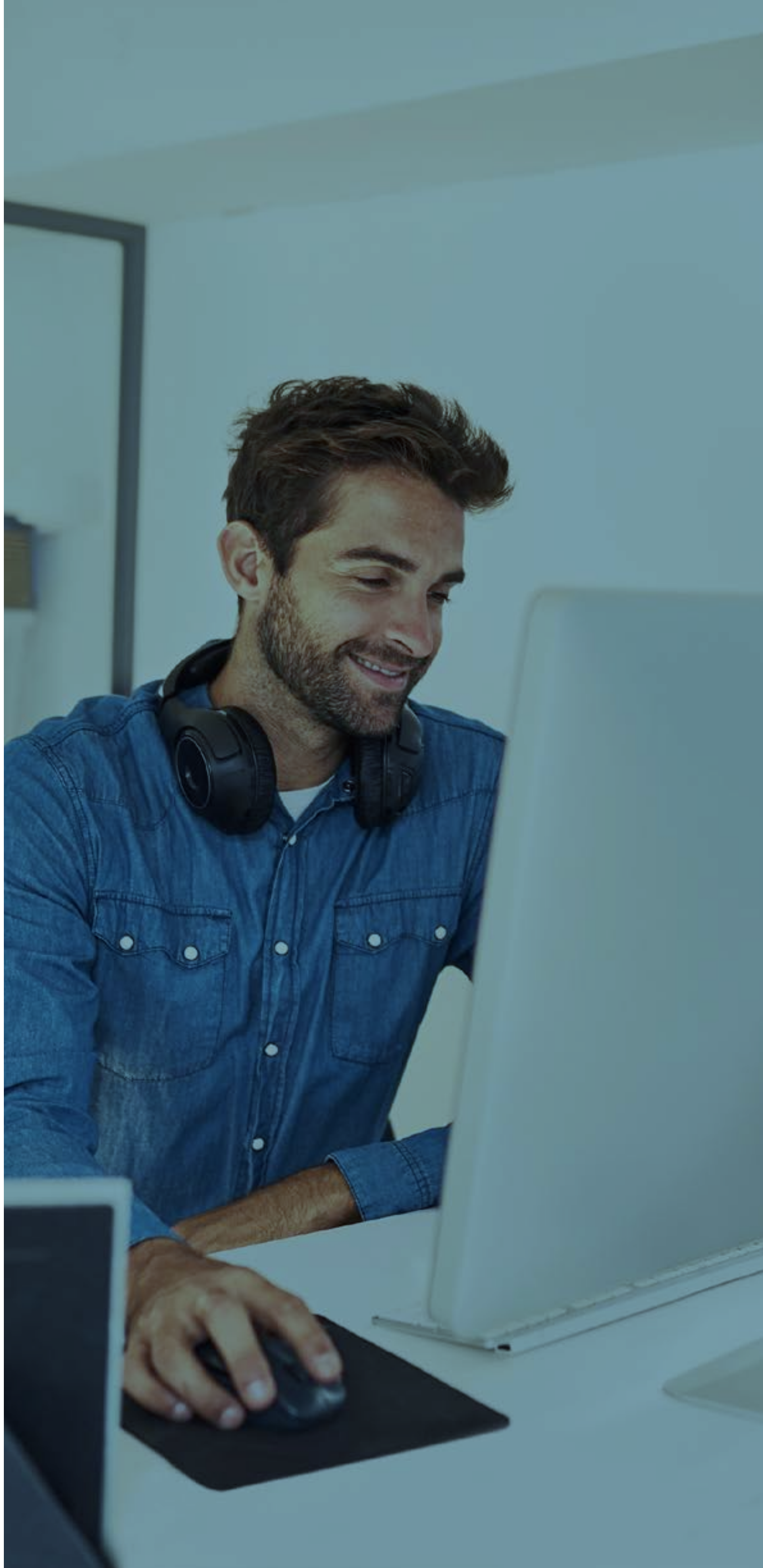
- **Keep it current**
  New versions can be automatically emailed out to the sales team and any other key stakeholders. Versions and associated correspondence are also tracked in Salesforce, so no one loses track of the most up-to-date version of the document.

Key considerations:

- **What templates do your teams need?**
  If your organization utilizes different account planning strategies based on rep role, territory, deal size, or some other parameters, you may need multiple, purpose-built templates.

- **What information needs to be in an account plan?**
  If certain information was previously going directly into account plans, you'll need to add fields to track it in Salesforce. Remember, account plan information can live across multiple objects, including Accounts, Opportunities, Contacts, and custom objects.

- **What process and training changes will be required?**
  Reps who were building account plans manually will need to learn where to input data to generate accurate plans. It will be worth the effort when that data is kept up-to-date and available to everyone who needs it.



Project Report Cards

Whether you provide consulting, professional services, or software, you likely do some kind of project planning with your clients. It might be an implementation plan for your SaaS solution, a project roadmap for a rebranding effort, or a set of business KPIs across their five-year plan, but in every case it's important to have regular check-ins to review the plan, progress made, and next steps.

These report cards are invaluable to keeping projects on track and ensuring clients are satisfied with your work. But they can require a serious time investment to get right, and too many organizations end up losing touch with their accounts and losing track of customers' goals. This has a direct impact on customer satisfaction, which in turn affects on-going into loyalty and future business: 56% of customers of business consulting firms would say the firm didn't fully deliver on their promises, and they weren't certain they'd still be working with the consultant two to three years down the line. Providing regular updates and closing the feedback loop is an important step in retaining those customers.

56%

of business consulting firms don't fully deliver on their promises, according to their customers.

(Source: How Buyers Buy Management Consulting Services. Hinge Research Institute, RAIN Group.)

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Why automate?

- **Invest time where it's most useful**
  Without automation, your busy team has to take time to input numbers and notes into a review document—doubling their work when they're already tracking the same information in a project management suite or on spreadsheets.

- **Impress your customers and deepen the relationship**
  Manual copy-paste work increases the likelihood of error, which damages your reputation with clients. On top of that, the more time it takes your team to prepare for check-ins, the more likely they are to under-prepare or cancel the meeting altogether.

How does it work?

- **Centralize your efforts**
  While Salesforce has been traditionally focused on CRM, it's evolved into a powerful project management tool through native improvements and sophisticated apps. Once that project management information is tracked in Salesforce—say, a list of deliverables with associated statuses, due dates, owners, and notes—it can be built into automated documents.

- **Send report cards on time, every time**
  Set the documents to automatically send to project collaborators and clients weekly, monthly, or at any other interval you please. Clients will appreciate the direct engagement, consistent updates, and transparency. Your professional services team will find satisfaction in being able to deliver on promises made and will be happy to have the time back that they spend building reports.

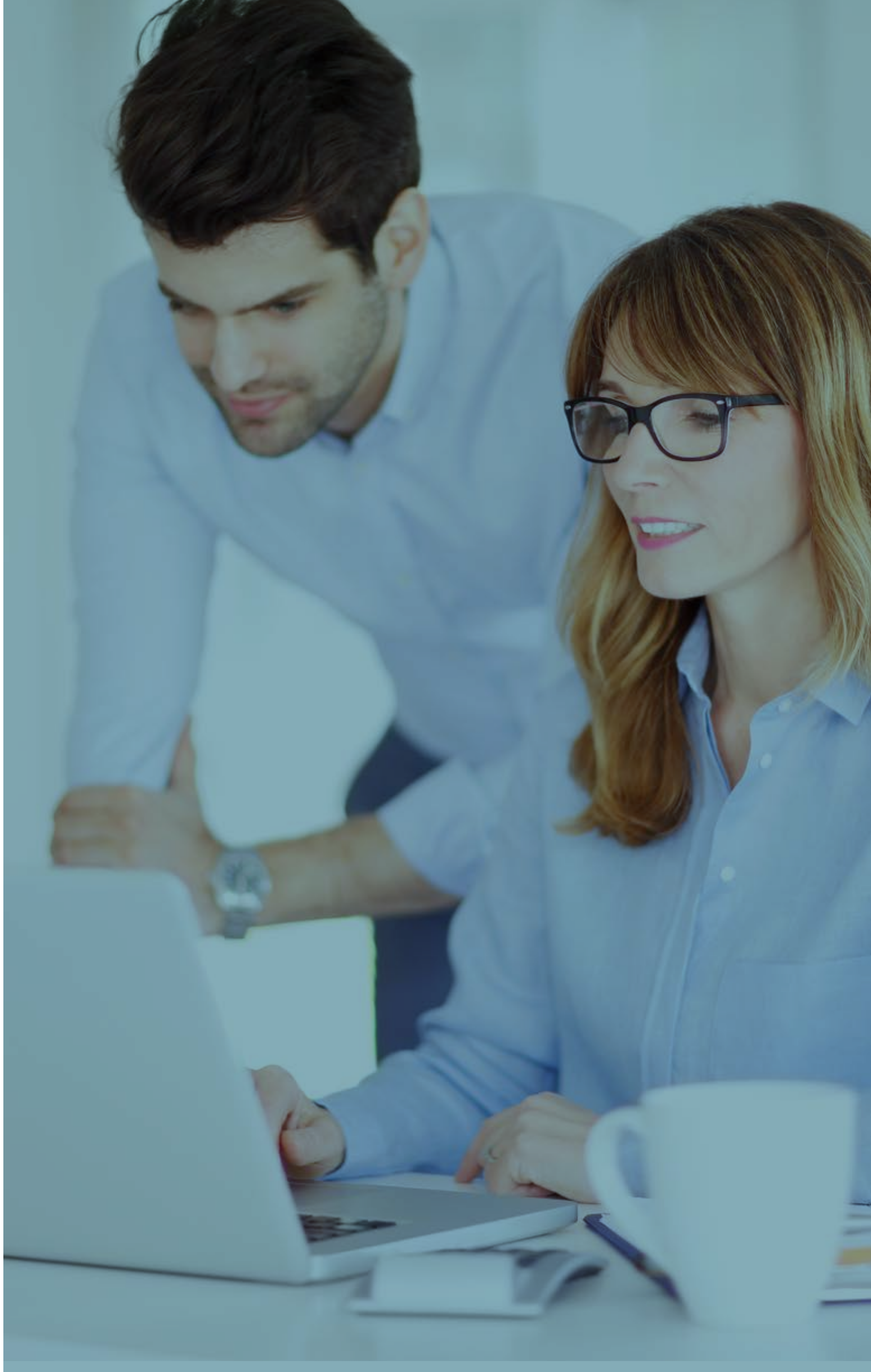
Key considerations:

- **What's your project update reporting cycle?**
  Identify your current project update cycle, and consider what cadence you'd like to maintain if you could. If clients' expectations are out of touch with reality by the end of a project, that's a telling sign that they weren't kept in the loop during planning and execution.

- **Where does your team manage projects and track deliverables?**
  If you're using a third-party project management tool, consider integrating it with Salesforce to centralize customer and project information in one place. This will simplify account management and make it easy to generate project status reports through Salesforce.

- **How much time does your team spend preparing project reports?**
  Look at where the bulk of that time is spent, and identify the manual process pieces that could be eliminated with integration and automation.

"How Buyers Buy Management Consulting Services." Hinge Research Institute, RAIN Group. 2013.



Invoices

Congratulations, you've closed a new deal! Nurturing and closing the deal were a major investment, and now it's time to collect—but how do you do it? Manual processes get in the way of revenue attainment, as errors and duplicate invoices don't just slow the invoicing cycle, they damage your reputation in the process. After all, if you can't be trusted to produce accurate invoices, how can a customer trust you to deliver on your other promises?

When a payment deadline is approaching, just 16% of companies have automated processes for payment reminders on unpaid invoices. That means late and missed payments are likely to generate additional manual work for your team, and revenue is more likely to slip through the cracks. Invoice automation not only saves time, it boosts revenue attainment.

16%

of companies have an automated process for payment reminders.

(Source: B2B Billing & Collections Guide: 15 Key Benchmark Survey Takeaways. Esker. 2015.)

6

Why automate?

- **Clarity and consistency**
  You need clear, consistent invoices that clients can easily read and understand.
- **Get it right the first time**
  Mistakes can be costly, both in terms of lost or delayed revenue and in terms of your reputation—duplicate invoices, invoices listing the wrong products, or inaccurate payment terms create problems for your customers and make your business look disorganized and unprofessional.
- **Save time and hassle**
  Your sales reps, admins, and accounting staff simply shouldn't have to spend time manually generating, updating, and sending invoices. There are many other tasks where they can use the time spent more productively.

How does it work?

- **Generate invoices & receipts on your schedule**
  Build invoices that can be sent from Salesforce with a single click, use batch invoicing to send multiple invoices with a click. Use automated scheduling to send them on a pre-set cadence or create a new workflow that sends an invoice automatically when an account is closed to eliminate clicks altogether!

- **Don't let anything slip through the cracks**
  Automate due date reminders and internal notifications for unpaid invoices, to ensure that your team stays on top of potential issues. Automatically log activities in Salesforce, so that you never accidentally double-send the same invoice or forget to update a field.

- **Invoices can be beautiful, too**
  Just like quotes and proposals, use dynamic, richly formatted templates to show or hide sections and dynamically group line items, ensuring that invoices are clear, well-formatted, and contain only the necessary information.

Key considerations:

- **When do you need to generate invoices?**
  Depending on your accounting processes, you may need to individually review details and generate each invoice one at a time. More likely, you can batch send invoices or even automate those batch sends, so invoices are always sent right on time.

- **Where is the information you need to generate invoices?**
  Document templates can pull information from multiple Salesforce objects into the same document, so any information stored in Salesforce (or any information that can be added to Salesforce with an integration) can be incorporated into your invoices.

- **Who receives invoices, and how are they tracked in Salesforce?**
  Your automation design will depend on whether the invoice recipient is designated as a Contact, or as a field on the Account. Make sure you choose the most accurate email address and have a plan for keeping it up to date.

B2B Billing & Collections Guide: 15 Key Benchmark Survey Takeaways. Esker. 2015.

Renewals & Business Reviews

Nearly three-quarters of business customers would say they're not getting value from a majority of the technology products they've paid for. What's going to happen when those contract periods end? If you don't have a plan in place to demonstrate the value of your services, your customers may not be seeing it, and you may lose business at renewal time.

Here's another way to look at it: increasing customer retention by just 5% can increase profits by 25–95%. Retention is by far the most efficient route to growth, and demonstrating value lays the foundation for success. Investment in periodic business reviews and contract renewal preparation goes a long way, and teams can maximize that investment by automating as much of the process as possible.

Increasing customer retention and engagement by 5% increases profits by up to 95%.

(Source: "Prescription for Cutting Costs." Bain & Company.)

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Why automate?

- **Keep demonstrating value**
  Annual or quarterly business reviews that incorporate account performance and adoption data demonstrate the value of your products and services, reinforce your team's relationship with the customer, and provide an opportunity to collect important information about a client's current satisfaction, new opportunities, and pain points.

- **Dress to impress**
  Business reviews are an excellent opportunity to reinforce your brand image with personal attention and polished, customized presentations.

- **Set your team up for success**
  Without automation, account executives or customer success managers have to review the account's original contract, current performance, and potential future needs, then develop a customized presentation template and, if it's the account's renewal term, a contract renewal. Automation saves time and lets your team focus on engagement.

Berkowitz, Todd. "Show Value to Customers Before Trying to Expand Account Revenue." blogs.gartner.com. Gartner. 2015.

How does it work?

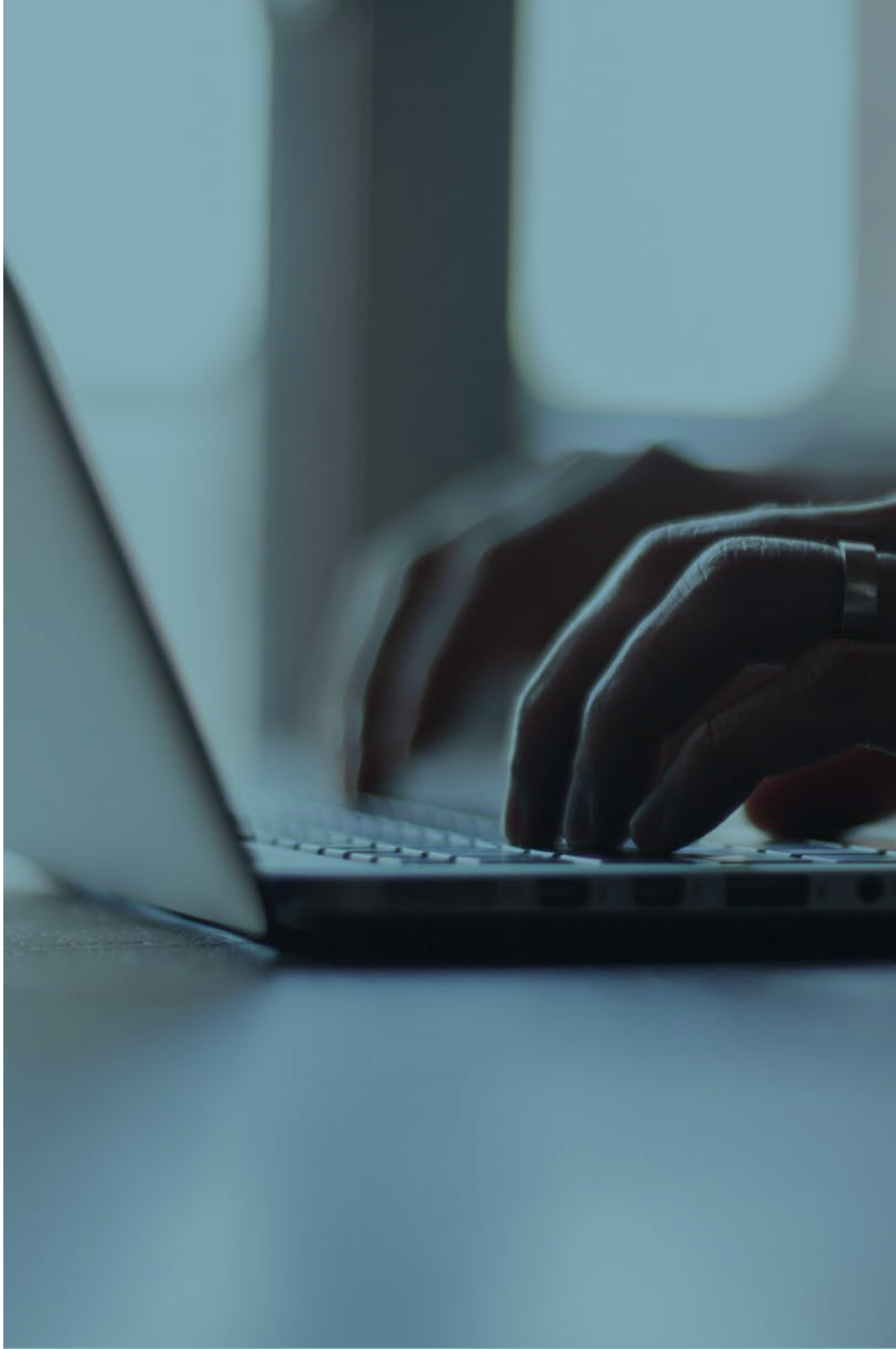
- **Include all of the important information**
  Incorporate business data from multiple Salesforce objects to report on project progress, subscription information, and product or services usage, such as SaaS user licenses or billed service hours.

- **One click and it's done**
  Document templates combine with the data that's already stored in Salesforce to generate presentations and renewal contracts with a single click. Include customized formatting, illuminating charts, and even images to truly personalize the presentation.

Key considerations:

- **What's your business review cycle?**
  Consider account value and tiers when preparing a business review strategy. Automation reduces the manpower required to prepare for each individual review, so more customers can receive that personal touch. Identify preparation steps that currently require manual data entry, and eliminate them with automations.

- **What data do you use for business reviews?**
  Depending on how you're currently tracking adoption and value metrics, you may need to report across multiple Salesforce objects to bring them into business review documents. If the data lives outside of Salesforce altogether, you may need to integrate or periodically import that data.



Reichheld, Fred. "Prescription for Cutting Costs." Bain & Company. 2001.

Implement integrated, automated solutions for the win!

Conga's comprehensive suite of solutions featuring Contract Automation, Document Automation, and Sales and Support Automation was built to simplify business operations for maximum efficiency and success. Thousands of businesses worldwide are already using Conga tools such as Conga Composer, Conga Contracts, Conga Courier, and Conga ActionGrid to streamline internal processes, accelerate sales cycles, and boost their bottom lines.

Conga Composer: **document management tool for all your business use cases**

- Use Conga Composer to generate predefined documents with a single click, automatically log activities, save copies of output files, and update fields in Salesforce.
- Merge data from any standard, custom, or Lightning Connect object, or even from external sources such as an ERP or multiple Salesforce organizations.
- Distribute documents in your preferred document format, including Word, Excel, PowerPoint, PDF, or HTML emails, via any and all methods you need: immediate download, email attachments, Google Drive, Microsoft OneDrive, Salesforce attachments, Chatter files, Content records. Or send them straight out for signature using direct integrations with DocuSign, Sertifi, and Adobe Sign.

Conga Contracts: **simplified contract production and management**

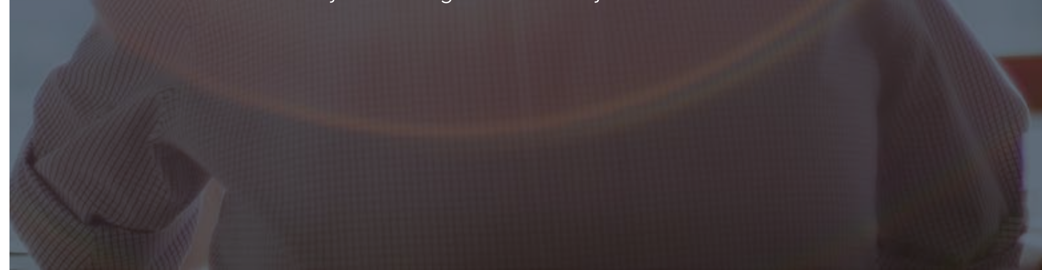
Streamline contract negotiation cycles using predefined templates, a pre-approved clause library, and sophisticated redlining, version review, and True-Up tools. Simplify contract approvals and ensure contract information is accurately synced back into Salesforce.

Conga Courier: **powerful report scheduling**

Email Salesforce reports to anyone inside or outside your organization, and use powerful dynamic filtering to ensure that everyone gets exactly the data they need. For example, send a report to all sales managers that dynamically filters based on territory, so each manager sees data for their own teams. Customize the report format, email content, and scheduling, so that each recipient gets the content and context they need to take action.

Conga ActionGrid: **grid-based data management**

Simplify sales process and data management by bringing together important account information in a dynamic grid view. Sales reps can see all the important information about their accounts in one place and edit inline without clicking through to individual records. Multi-layer filtering and batch edits take ActionGrid a step further, creating an intuitive, Excel-style editing tool directly within Salesforce.



Gaining a strategic, competitive advantage

The times have changed. Teams need to be more efficient, consistent, and data-driven in order to be effective. With the right technology, you can leverage your Salesforce implementation to customize and automate workflows, present a consistent brand message, accelerate sales cycles, and improve customer engagement.

By automating your essential business documents, you can efficiently and effectively execute your sales strategies, customizing every process and every document to your specific needs. With everything managed centrally, templates, documents, and data are always right at your fingertips.

Your people, products, and strategies combine with the right technology for a real competitive advantage, as you accelerate your sales cycle, reduce error, and ensure your reps have the time they need for deep engagement with customers.

About Conga:

Conga helps businesses get more value from their Salesforce CRM, by automating documents and accelerating sales. The Conga Suite of products, which includes Conga Composer, the #1 paid application on the Salesforce AppExchange, increases the value of the Sales Cloud by simplifying and automating data, documents, contracts and reporting.

For more information about how Conga helps the world's leading brands accelerate sales and business processes and report on actionable data to drive business forward, visit www.getconga.com.

The 7 Essential Documents To Automate For Business Success Checklist

Automation can transform your organization from a slow, inefficient, and ineffective team into a more nimble, productive, and profitable machine. Here's a checklist of the seven essential documents to automate for the greatest impact on your sales velocity and team performance.

Automating your essential business documents helps your team gain efficiency and effectively execute your sales strategies, customizing every process and every document to your specific needs. With everything managed centrally, templates, documents, and data are always right at your fingertips.

Visit www.getconga.com for more tips, ideas, and insights to accelerate your sales and business processes.

Get a Custom Demo

1. **Pipeline reports and opportunity records:** Remove data source limitations, expand data visibility, and streamline formatting for customized content and automated delivery.
2. **Quotes and Proposals:** Save time and resources, maintain brand consistency, and create a paper trail by creating templates with dynamic fields and forms.
3. **Contracts:** Close business faster and reduce legal department scrutiny with standard terms and conditions, simple editing, and one-click delivery.
4. **Account Plans:** Gain a 360-degree view of customer accounts, reduce data entry errors, and close the loop with Salesforce by centralizing data in a database and sending pre-scheduled reports.
5. **Project report cards:** Provide greater visibility into project progress and deliver what you promised by incorporating project data into a single document sent at regular intervals.
6. **Invoices**: Maintain brand consistency, improve accuracy, and eliminate manually created invoices with rich formatting, automated due date reminders, and scheduled invoicing.
7. **Renewals & business reviews:** Re-engage with satisfied customers to uncover new business opportunities or gain references and make a compelling business case for renewal with single, branded custom project wrap-up reports.

Get a custom demo on how document automation can transform your business at https://getconga.com/contact or call us at 303.465.1616.

Get a Custom Demo

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