

Dude Solutions accelerates sales proposal creation by 66% with Conga Collaborate

conga



Customer Name

Dude Solutions

Industry

IT Services

Product/Services

Conga Collaborate

Business Outcomes

- Delivered end-to-end automated sales document creation process
- Accelerated proposal creation by 66%, cutting the time from 6 minutes to 2 minutes
- Increased sales productivity 3X, freeing reps to make up to 60 prospecting calls daily
- Supported 175 sales reps with just 2 enablement and operations resources

“Salesforce is the core of our business, but as a growing company, we needed ways to improve how we used it. With Conga Collaborate we dramatically improved the efficiency and effectiveness of our whole sales team by replacing inconsistent manual quote processes with customized automation that push and pull data to Salesforce in real-time.”

LINDSAY BASKERVILL, SALES OPERATIONS & ENABLEMENT, DUDE SOLUTIONS

The Challenge

More than 10,000 companies have turned to Dude Solutions to help improve their operating efficiency and effectiveness. With so much success, the company wanted to find new ways of enabling its own 175-person-and-growing sales team to work faster and more efficiently close more business.

Over the years, the sales team had relied on time and resource-intensive manual processes to generate price quotes, proposals, and sales contracts for customers. Reps were using a combination of Microsoft Word documents, spreadsheets, and calculation tools to create each new business proposal, price update, or renewal calculation. This cut deeply into reps' primary revenue-generating activities and also increased the risk of potentially costly data errors.

The Solution

Dude Solutions deployed Conga Collaborate to automate document generation and streamline sales operations. With Collaborate, the team created an array of document templates – sales quotes, renewal contracts, RFP responses, and others – that automatically populate documents with data pulled directly from the company's Salesforce database. The templates feature standard color palettes, logos, formatting, and other elements to create consistent branding across all external communications. More importantly, the solution integrates seamlessly with Salesforce CPQ and electronic signatures to create an efficient, mistake-free document generation process.