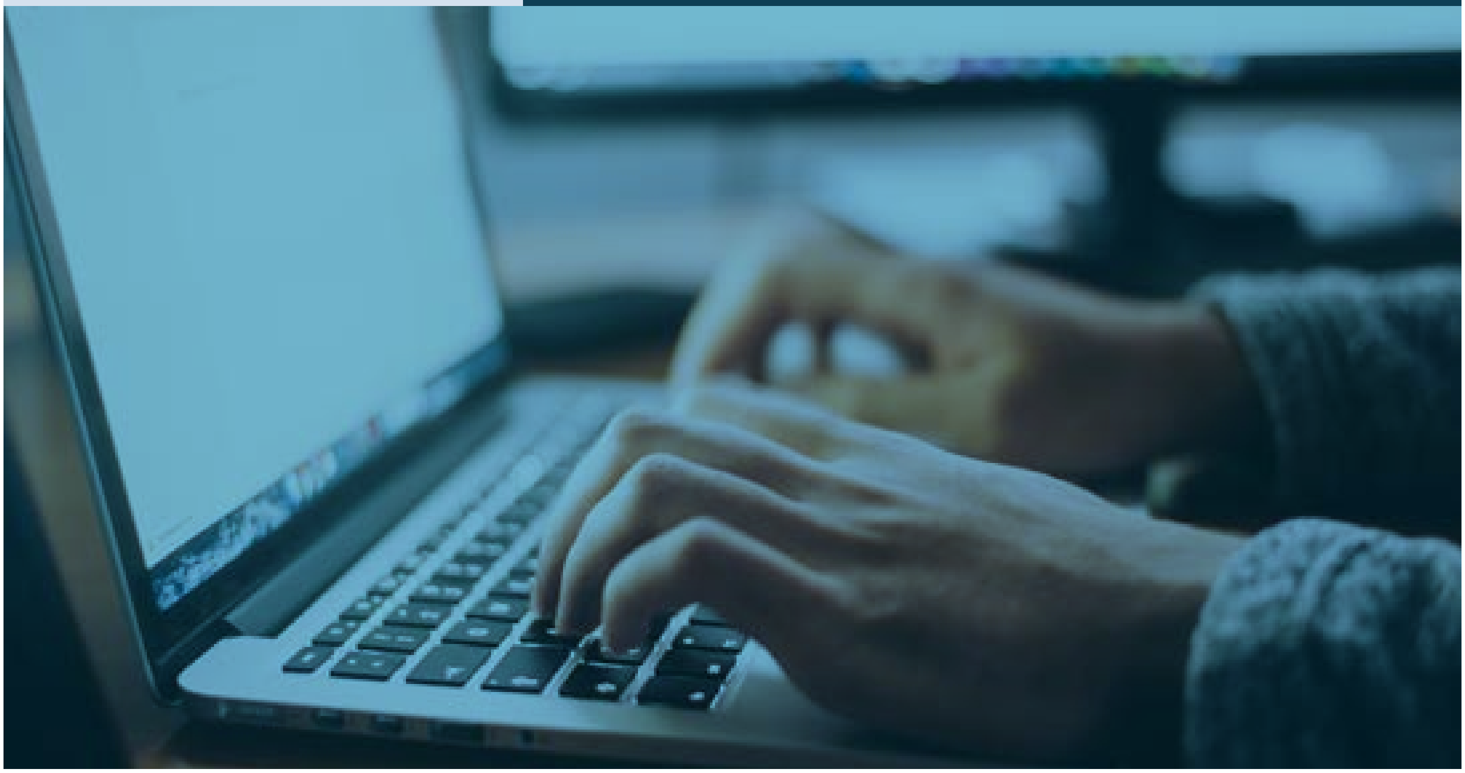

WHITE PAPER

Admin's guide to maximizing Salesforce ROI

How to employ intelligent automation to close gaps, improve efficiency, and drive better adoption of Salesforce across the enterprise

Money doesn't grow on trees

Most companies don't have an endless supply of cash to burn. So when they invest in new systems and technologies such as Salesforce and other business operations solutions, it's imperative their dollars don't go to waste.

Salesforce in particular has become indispensable to successful organizations, but many teams still struggle to leverage it to the fullest extent of its capabilities. Many management teams see Salesforce as a complete solution right out of the box, but complex and time-consuming configurations, user training, and manual processes for managing daily tasks all conspire to make optimizing the software for maximum productivity and return on the investment (ROI) the bane of many a Salesforce admin's existence.

Specifically, sales and marketing teams routinely wrestle with document generation, records management, and data updates. They turn to the IT team or the Salesforce administrator for support, resulting in a flood of support requests for remedial, repetitive requests that take key resources away from focusing on more strategic initiatives that will help the business better meet its goals.

In response, Salesforce admins and IT support staff need to find new, inventive ways to enable greater self-service and more efficient daily use of systems, processes, and tools. This investment can keep the business competitive and profitable--without sacrificing more of the admin's valuable time.

Incorporating intelligent automation streamlines data management, simplifies customer and operational data updates, and accelerates document creation and delivery for teams across the enterprise. It's an efficient, cost-effective way to maximize productivity, user adoption, and ultimately, return on your investment.

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Overcoming siloed tools, huge volumes of data, and limited insights

One of the biggest advantages of using Salesforce over other CRMs is its expansive capabilities and extensive ecosystem of more than 3,000 active marketplace partners. Salesforce is already equipped with an array of essential off-the-shelf features that have become the benchmark for industry standards. Salesforce AppExchange partners offer a range of plugins, APIs, and supporting tools that deliver extra value and capabilities to meet virtually any business need.

However, having so many tools available with just a click and a download also has its downfalls. Specifically, the responsibility of determining which ones to use and how they'll be incorporated into the Salesforce environment falls on individual Salesforce admins, who must figure it out for each team and a whole company.

Each new tool requires a level of customization and configuration to meet the diverse needs of different user groups. And when those processes fall on individuals or to IT teams with limited resources and other priorities, it can seem an impossible task to deliver the features and capabilities each team or department is requesting in a reasonable time.

Effectively managing a tsunami of data

Beyond configuration and customization, one of the biggest challenges facing Salesforce users and admins is how to handle the massive amounts of viable, useful data created each day. Sales and marketing teams are starved for more information that will help them identify new opportunities and close more business, faster. But much of the information they need will come from sources outside their Salesforce environment.

The business-to-business (B2B) purchasing process continues to evolve. It now involves an average of seven stakeholders from an array of roles and functions that weren't included in the buying decision before[1]. And as new personas are added to the mix, sales teams will need to effectively manage increasing volumes of existing customer data and pull in new information from various sources to give them every possible edge in securing new opportunities.

Yet the traditional approach to account and records management is time- and resource-intensive. Manual data entry is tedious and prone to errors. Document creation and distribution usually involves constant toggling among systems, clicking-and-dragging, and copying and pasting that can result in a user wasting up to 66% of his or her daily work time that could be spent on revenue-generating activities[2].

Over time, wasted effort on low-impact, repetitive tasks will drive sales and marketing users to abandon company standard processes and develop their own workflows to shortcut the process. Not only does this decrease efficiency, but it increases the likelihood of duplicate data, outdated account records, and gaps in information that can mean the difference between winning a new customer and never knowing it was even an opportunity--already costing US businesses an estimated $3.1 trillion a year due to poor data management and quality[3].

The high cost of limited insight and reporting

Of course, ingesting and organizing data is just one half of the challenge. Data is only as valuable as the ability to use it to make decisions that move business forward. But because of the limitations of generic analytics tools and canned reports, as little at 5% of data is ever analyzed and mobilized[4].

Rather than being useful for developing new strategies or aligning sales tactics, the tidal wave of data instead leads to analysis paralysis. The massive volumes of information preclude teams from identifying and prioritizing high-value accounts, segmenting customer accounts for targeted sales and marketing campaigns, or uncovering new business opportunities hiding deep within the data.

The inability to slice, dice, and deploy the high-value information residing in Salesforce leads to longer sales cycles, lower average deal sizes, and more pressure on sales teams to perform. In turn, those sales teams end up relying too heavily on IT and admins for the data support they so crucially need, creating inefficiencies and roadblocks that directly impact both productivity and profitability.

In an environment like this--chronic challenges with data management, document generation, and meaningful reporting--the resulting "spray and pray" approach to sales and marketing leads to poorly engaged transactional relationships.

Worse, the hodgepodge of hurried, repetitive emails or calls can make the organization appear disorganized and out of sync, jeopardizing new business opportunities and ultimately degrading the quality of the customer relationship.

Enhancing Salesforce value and utility with Intelligent Automation

Salesforce admins and IT teams already have a lot on their plates and face a litany of challenges in trying optimize Salesforce for multiple user groups and individuals.

To simplify support, accelerate deployment of new features and capabilities, and improve overall user adoption to improve ROI and justify the investment to budget decision makers, sales and operations leaders can use third-party productivity tools to extend the value and utility of their Salesforce investment.

Now, organizations can automate the most time-consuming elements of daily Salesforce use and provide every user group with powerful new features for simplifying record and data management, delivering more granular insights for smarter planning and decision making, and ensuring that the right information is delivered to the right people, at just the right time--without intervention from IT or Salesforce admins.

Visibility

Provide sales and marketing teams with end-to-end account and opportunity visibility with simple previews and consolidated views of multiple levels of data to enable smarter planning and decision making. Consolidating account and contact records makes it easier to sort tasks by priority or due dates to ensure that essential activities or communications never get missed.

Additional insights into line-of-business, geographic, and revenue level displays helps users better allocate their time and efforts toward strategic accounts or those with the highest potential payout (and fewer complaints about wasted time).

Data Governance

Dramatically improve the availability, integrity, and security of Salesforce data. Quality, accurate data is essential to efficient and effective sales and marketing activities. Data management tools should feature bulk aggregation for easily bringing together information from diverse sources. Once in Salesforce, users should be able to update and edit multiple objects simultaneously, edit line items effortlessly in-line, and batch similar tasks for faster, easier completion--but only accessible based permissions granted for their user role to ensure security.

76% → of global Salesforce users increased their investments in analytics during the last 12 months and were three times more likely to see data quality as a competitive advantage[5].

Insight

Knowledge is power and third-party Salesforce tools can make it easier to access a multitude of company data to slice, dice, and segment for deeper insight and smarter decision making. Configurable dashboarding enables sales reps, managers, marketers, and other users to rapidly generate multi-format reports for a variety of uses--forecasting, pipeline analysis, upcoming renewals, and more--using the company's proprietary data and share them with both internal or external audiences.

Data and information delivery

Companies seeking to streamline processes, save time and money, and boost overall productivity need to make sure that information is reaching the right people at just the right time. Salesforce tools automate previously manual processes, eliminating time spent digging for information and or learning new systems for finding it, while also simplifying document generation, distribution, and coordinating reviews and approvals.

Automating document generation and distribution not only saves time and effort, it also eliminates costly errors such as typos, miskeyed dollar figures, and other essential information that are hallmarks of manual processes.

Maximize Salesforce efficiency with the Conga Digital Document Transformation Suite

Conga's comprehensive suite of Salesforce automation tools makes sales teams more productive, unburdens administrators and IT support staff, and increases organizational efficiency to help deliver a stronger return on the Salesforce investment.

These flexible, easily configurable tools integrate seamlessly with Salesforce for a practically transparent user experience and effortless deployment. Conga's suite of integrated solution is purpose-built to maximize the value of your Salesforce deployment by accelerating sales cycles, improving data quality and accuracy, delivering error-free quotes and proposals, and uncovering revenue opportunities that were previously lost to limited business insights.

Here's how:

Conga Grid

Built to address the tedious nature of Salesforce lists, Conga Grid is an intuitive tool that simplifies data and record management, allowing sales reps to edit information in a familiar spreadsheet-style grid view without having to click through different records and list views.

Salesforce admins can rapidly set parameters and processes based on user roles, enabling text fields and related lists previews from a consolidated reading pane along with multi-layer filtering and batch edits to enable records editing directly within Salesforce. Improve data quality management, help sales teams uncover opportunities sooner, and engage prospects before competitors--without additional help or support from the administrator or IT.

Conga Composer

Create more efficient sales teams by driving communication like proposals, quotes and invoices with a single click and showcase your brand with professional rich documents in less time. Conga Composer eliminates manual copy-paste work and dramatically accelerates sales cycles with one-click documents, fully customizable templates, and native Salesforce integration.

Merge data in Salesforce from internal and external data sources and deliver quotes, proposals, and other key documents in Word, Excel, PowerPoint, PDF or HTML email formats with a single click. Composer helps sales teams address sales opportunities faster and respond instantly to customer demands with 95% more efficient document generation that eliminates unproductive time and frees sales teams to pursue revenue-generating activities.

Conga Contracts and Conga Contracts for Salesforce

Accelerate negotiations so you can close deals faster—without leaving Salesforce. Conga Contracts and Conga Contracts for Salesforce streamline contract lifecycle management (CLM) to improve productivity with predefined templates, a pre-approved clause library, and sophisticated redlining, version review, and True-Up tools.

Conga solutions feature enhanced tools to accelerate negotiation and approvals by eliminating bottlenecks, centralizing contract creation and securely storing contract versions and final documents back into a central document repository, while providing granular reporting that helps legal teams navigate complex agreements faster, more securely, and transparently.

The Contracts Wizard provides a simple, intuitive interface for administrators to build contract workflow and approval requirements, ensuring a smooth user experience and policy enforcement. Clause libraries can be easily accessed to provide consistency and speed on contract turnaround. Every redlined version and change is tracked and clearly marked and written back into Salesforce.

Conga Courier

Deliver greater power and efficiency to report scheduling and distribution. Email Salesforce reports to anyone inside or outside the organization, and filter options to ensure that everyone gets exactly the data they need. Customize the report format, email content, and scheduling, so that each recipient gets the content and context they need to take action in a format that can be made specifically for their needs.

Simplified processes, efficient workflows, and greater ROI

Companies spend valuable time and resources on expensive CRM platforms like Salesforce. Too often manual processes, inefficient workflows, and evolving business needs make it difficult to achieve maximum return and value from the investment.

Using third-party Salesforce automation tools can help simplify complex and time-consuming data management tasks, while also streamlining other parts of the sales cycle to save time, money, and to spare admins and IT teams the stress of managing wide-ranging and repetitive support requests

Learn more about how Conga solutions can help your organization work more efficiently, more intelligently, and deliver a stronger ROI on your Salesforce investment.

Visit https://getconga.com/free-trial/ to start your 30 Day Free Trial.

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Conga Americas
Global Headquarters
390 Interlocken Crescent
Suite 500
Broomfield, Colorado 80021
+1.303.465.1616

Conga EMEA London
3rd Floor
60-62 Margaret Street
London W1W 8TF
+44 (0) 203 608 0165

Conga APAC Pty Ltd
Level 11
68 York Street
Sydney NSW 2000