



Project Profile

Contract Operations: Tactical Fixes with Strategic Impact

A Salesforce + Conga Sign/Conga Composer Solution

Overview

A mid-sized B2B services firm needed to modernize the way its contracts were created, approved, and managed. Initially, the goal was straightforward: streamline contract drafting, standardize templates, automate routing, and provide visibility into contract terms.

What began as operational improvements quickly became strategically critical. By centralizing contracts, automating workflows, and capturing key clause data, the firm was positioned to deliver complete, accurate, and accessible contract information—a capability that proved invaluable for private equity due diligence, financing, and potential future sale.

Challenges

Before the project, contract management was fragmented and manual:

- **Single bottleneck:** All routing went through one person using DocuSign, creating delays and risk.
- **No centralized repository:** Contracts were scattered in shared folders with no reporting, no lifecycle tracking, and no visibility into expirations.
- **Inconsistent ownership:** Individual project managers and account executives were responsible for tracking renewals and approvals, leading to errors and missed deadlines.
- **No formal approval workflow:** Compliance and internal reviews were bypassed, increasing risk.
- **Limited visibility into key clauses:** Payment terms, indemnity, escalation, and change-of-control clauses were not trackable, making renewals, margin protection, and due diligence difficult.

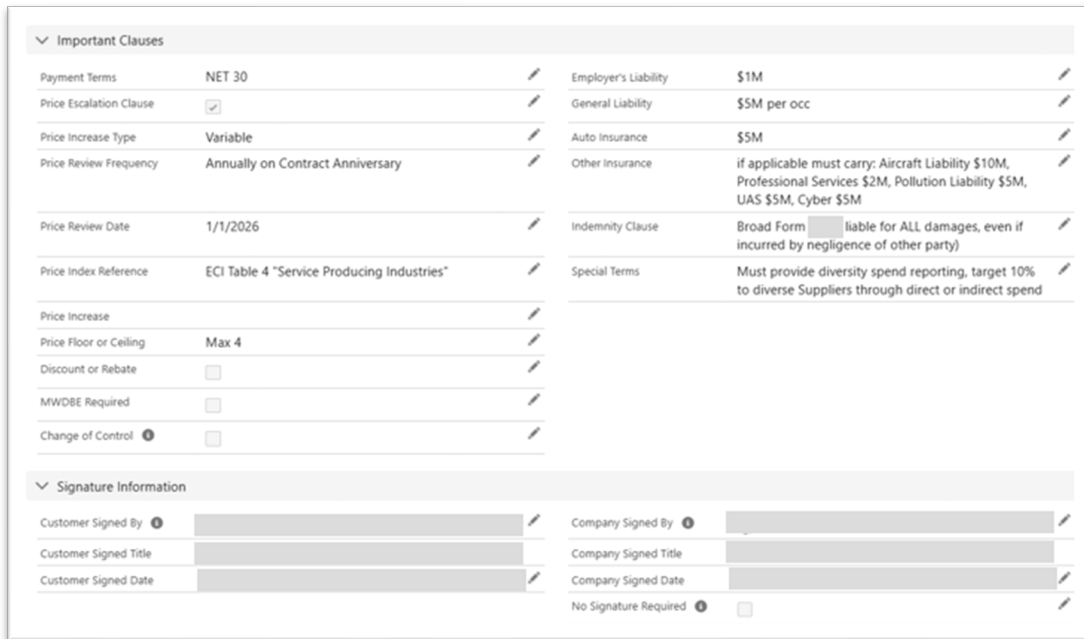
The firm needed a unified, auditable system that combined operational efficiency with strategic visibility—especially important as leadership prepared for private equity review.

Solution

The solution combined **Conga Composer** for document generation, **Conga Sign** for e-signature routing, and a fully customized **Salesforce** contract management system with enhancements in the following areas:

1. Custom Fields

- Created a true contract database with fields tailored to operational and strategic needs:
 - Contract types: company-authored vs. client-authored (MSAs, PSAs, POs, Subcontractor Agreements)
 - Critical clause capture: payment terms, escalation, change-of-control, indemnity, rebates/discounts, insurance limits
 - Lifecycle tracking: start date, end/review date, signed date, and signatories



The screenshot displays a contract record form with two main sections: 'Important Clauses' and 'Signature Information'.

Important Clauses:

Payment Terms	NET 30	✎	Employer's Liability	\$1M	✎
Price Escalation Clause	<input checked="" type="checkbox"/>	✎	General Liability	\$5M per occ	✎
Price Increase Type	Variable	✎	Auto Insurance	\$5M	✎
Price Review Frequency	Annually on Contract Anniversary	✎	Other Insurance	if applicable must carry: Aircraft Liability \$10M, Professional Services \$2M, Pollution Liability \$5M, UAS \$5M, Cyber \$5M	✎
Price Review Date	1/1/2026	✎	Indemnity Clause	Broad Form <input type="checkbox"/> liable for ALL damages, even if incurred by negligence of other party	✎
Price Index Reference	ECI Table 4 "Service Producing Industries"	✎	Special Terms	Must provide diversity spend reporting, target 10% to diverse Suppliers through direct or indirect spend	✎
Price Increase		✎			
Price Floor or Ceiling	Max 4	✎			
Discount or Rebate	<input type="checkbox"/>	✎			
MWDBE Required	<input type="checkbox"/>	✎			
Change of Control	<input type="checkbox"/>	✎			

Signature Information:

Customer Signed By	<input type="text"/>	✎	Company Signed By	<input type="text"/>	✎
Customer Signed Title	<input type="text"/>	✎	Company Signed Title	<input type="text"/>	✎
Customer Signed Date	<input type="text"/>	✎	Company Signed Date	<input type="text"/>	✎
			No Signature Required	<input type="checkbox"/>	✎

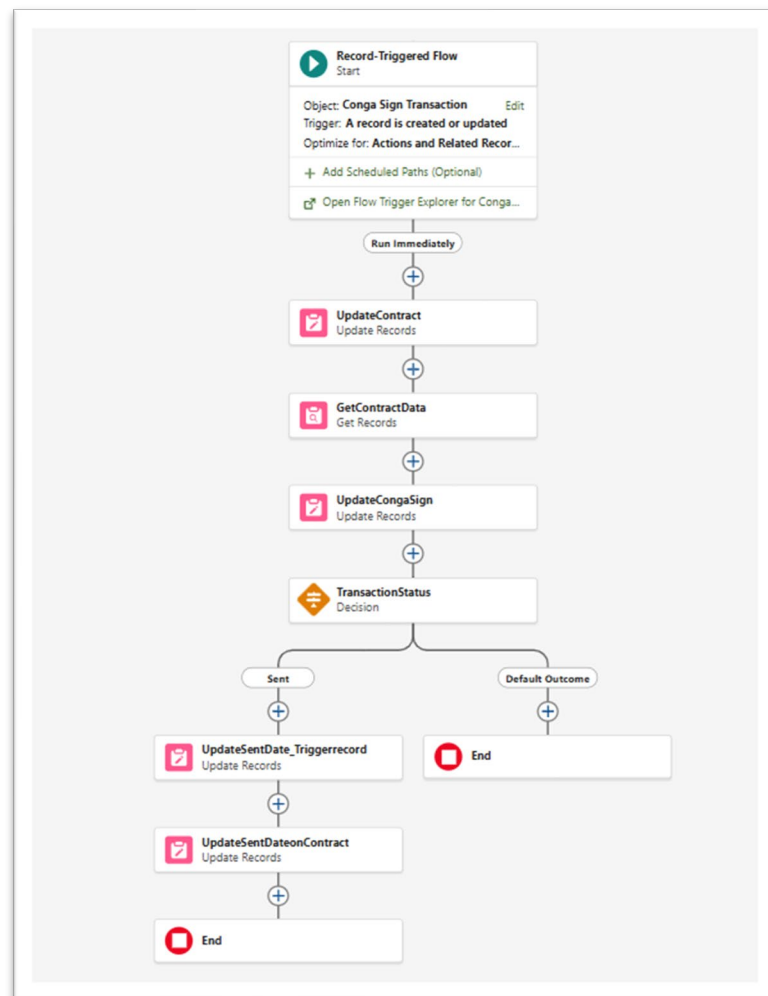
Example contract record with custom fields

- For the first time, the firm had a searchable, reportable, standardized dataset, crucial for both daily operations and due diligence.

2. Flows & Automation

- Automated updates to contract status with their related opportunities status (e.g., Contract Signed → Closed Won).
- Auto-expiration and automated reminders for contract renewals or annual price reviews.

- Approval flows ensured contracts routed to the right leaders at the right time, with email alerts and automated field updates at each step.



Example contract automation/flow diagram

3. Validation Rules

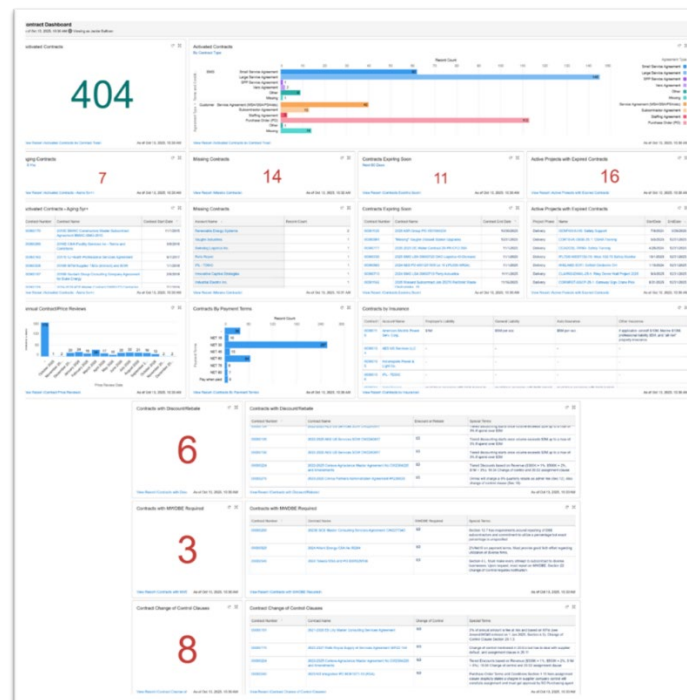
- Guardrails prevented skipped steps and maintained compliance:
 - Contracts could not be sent without a referenced proposal record.
 - Users could not bypass approval or stage progression.
 - Key fields were required before e-signature routing.
- These rules standardized contract handling across hybrid seller/doer roles.

4. Developed Conga Solutions

- Developed custom Conga Composer solutions that aligned contract workflows across the business. Each solution included:
 - Tailored data queries and reports pulling data from contract records, related opportunities, proposals, and product line item data.
 - Created standardized contract templates for consistent contract language and formatting.
 - Automated actions or behaviors such as saving the generated file to the contract record, applying a standardized file-naming convention, and logging activity
 - Created a custom button that when clicked, runs a process to automatically generate the document based off of the data query, template and behaviors that were developed.

5. Dashboards & Visibility

- Real-time dashboards provided leadership and account teams with insights into:
 - Upcoming expirations and renewals
 - Approval backlogs
 - Clause-level analysis for risk, payment terms, and escalation structures
- This visibility became foundational for strategic planning and due diligence readiness.



Example contract dashboard

Outcomes

- Centralized, searchable contract database replaced scattered folder storage.
- Standardized drafting processes using Conga Composer and client-specific templates.
- Streamlined routing and signature workflows with Conga Sign.
- True approval process with automatic notifications and compliance controls.
- Accurate, automated updates to Opportunities improved forecasting and revenue reporting.
- Full visibility into contract risk, including payment terms, indemnity, escalation structures, and change-of-control clauses.
- Proactive renewal and review management eliminated surprises and missed deadlines.

Strategic Impact for Private Equity:

- The structured, auditable contract database significantly simplified PE due diligence.
- Leadership could quickly answer questions like:
 - Which contracts have change-of-control clauses?
 - Which agreements are expiring in the next 90 days?
 - Where are price escalation clauses impacting margin?
- Positioned the firm for future sale or acquisition, making operational fixes a strategic enabler.

Lessons Learned

Several themes emerged during the project:

- **Technology is the easy part**—contract literacy is harder. Many employees knew contracts mattered but weren't comfortable reading them.
- **Training must be ongoing**, especially for hybrid roles that touch contracts infrequently.
- **Consistent data entry and validation rules** are essential for downstream visibility, risk analysis, and strategic review.
- **Automated renewals and tracking are critical**. People cannot manage deadlines at scale.
- **Early alignment across Sales, Legal, and Operations** prevents rework and ensures adoption.
- **Operational fixes can have strategic impact**. Even small improvements in routing, templates, and visibility can become critical for private equity review and exit planning.