



Project Profile

From 60+ Min to a Few Clicks: Streamlining Proposal Management

Salesforce + Conga Composer Solution

Overview

A mid-sized B2B services firm relied on a manual, error-prone proposal process. Sales reps spent 60+ minutes hunting for templates, assembling proposals, and routing them for approval. Errors, inconsistencies, and missed opportunities were common.

The firm implemented Salesforce integrated with Conga Composer to automate proposal generation, enforce an internal approval process, and standardize templates, pricing, and products. **Proposal creation went from 60 minutes of manual work to just a few clicks, while improving accuracy, compliance, and visibility across the sales cycle.**

Challenges

- Manual proposal assembly was slow, inconsistent, and prone to errors (e.g., wrong client name or pricing).
- Different teams used varying templates and formats, reducing professionalism and brand consistency.
- No structured approval workflow existed, creating risk for pricing, discounts, and compliance.
- Managers had limited visibility into pending proposals, stale opportunities, or approval bottlenecks.

Solution

Salesforce + Conga Composer created a centralized, automated proposal management ecosystem:

Templates & Document Generation

- Built standardized, branded proposal templates for each service line and client type.
- Conga Composer automatically populated client, opportunity, and pricing information, reducing errors and ensuring accuracy across proposals.
- Proposal creation went from 30+ minutes of manual work to just 3 clicks.



Proposal Number: [QUOTE_QUOTENUMBER]

Date: [TODAY]

To: [ACCOUNT]

[ACCOUNT BILLINGCITY] [ACCOUNT BILLINGSTATE]

[ACCOUNT BILLINGPOSTALCODE]

Re: [QUOTE_NAME]

Dear [OPPORTUNITY_CLIENT_CONTACT_NAME]:

Thank you for considering Safety Management Group (SMG) to provide project safety support. We appreciate the opportunity to submit a proposal and demonstrate the value our services can bring to your project.

As the leading safety service provider in the U.S., SMG's team of safety and environmental professionals offers comprehensive consultation, on-site, and software solutions to clients across a wide range of industries, including utility, aerospace, construction, manufacturing, petrochemical, and pharmaceutical. Our field associates are backed by an experienced team of safety, environmental and operational leaders, ensuring seamless delivery to our clients.

With over three decades of experience in transforming safety cultures, SMG specializes in initial assessments, program development, and ongoing field oversight tailored to each client's specific needs. We work closely with our clients to create an effective and sustainable safety program and are dedicated to maintaining the highest standards of safety and quality. This commitment is evident in the regular training and professional development opportunities we provide to our team of over 300 full-time professionals. Given our extensive experience and unwavering commitment to excellence, we are confident in our ability to help our clients achieve their safety objectives.

Please find our attached proposal, which outlines a customized plan for your [OPPORTUNITY_PROJECT_NAME], based on our discussions. This plan includes specific safety windows and a detailed fee schedule. We are confident that our proposed approach will ensure the safe and efficient completion of your project.

Thank you for your consideration, and we look forward to the opportunity to work with you on this project. If you have any questions or would like to proceed with scheduling our safety services, please do not hesitate to contact me.

Respectfully submitted,

[OPPORTUNITY_OWNER_NAME]
[OPPORTUNITY_OWNER_TITLE]
[OPPORTUNITY_OWNER_PHONE]
[OPPORTUNITY_OWNER_EMAIL]
8335 Keystone Crossing, Ste 103, Indianapolis, IN 46240

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Proposal Approval Process

- Implemented a structured internal approval workflow with thresholds based on proposal dollar value. Approval gates prevented sending proposals without completing required internal reviews.
- Automated routing ensured appropriate leadership reviewed proposals based on deal size or discount level.

Approval Processes

Quote: Proposal Approval Process 2024

Process Definition Detail

| | | | |
|------------------------------------|---|--|---------------------------------|
| Process Name | Proposal Approval Process 2024 | Active | ✓ |
| Unique Name | Proposal_Approval_Process_2024 | Next Automated Approver: Determined By | Peer Review of Record Submitter |
| Description | Updated proposal approval process for 2024 using peer review (under \$50K), editorial review (\$50K - \$100K), executive review (over \$100K) and leadership review (over \$500K) approvals | | |
| Entry Criteria | Quote: Status EQUALS Draft | | |
| Record Editability | Administrator OR Current Approver | Allow Submitters to Recall Approval Requests | ✓ |
| Approval Assignment Email Template | Proposal Approval Request | | |
| Initial Submitters | Opportunity Owner | | |
| Created By | Jacks Sullivan | Modified By | Jacks Sullivan |
| | 3/28/2024, 11:03 AM | | 8/6/2024, 2:34 PM |

Initial Submission Actions

| Action | Type | Description |
|--------------|--------------|------------------------------------|
| Record Lock | Field Update | Lock the record from being edited |
| Field Update | Field Update | Update Date Submitted for Approval |
| Field Update | Field Update | Proposal is Under Review |

Approval Steps

| Action | Step Number | Name | Description | Criteria | Assigned Approver | Reject Behavior |
|--------------------|-------------|--------------------|---|--|---|-----------------|
| Peer Review | 1 | Peer Review | Route proposal to the Service Delivery Manager for a Peer Review | | Assigned User: Peer Reviewer | Final Rejection |
| Editorial Review | 2 | Editorial Review | If a proposal is over \$50K, it must receive an editorial review. | Quote: Total Price GREATER OR EQUAL 50000 | Approval based on first response User: Sally Turner, Hannah Stansbury | Final Rejection |
| VP Approval | 3 | VP Approval | If proposal is over \$100K, it must be reviewed by VP | Quote: Total Price GREATER OR EQUAL 100000 | Approval based on first response User: Michael Smith, Stuart Henderson | Final Rejection |
| President Approval | 4 | President Approval | If proposal is over \$500K, then it must be reviewed by President | Quote: Total Price GREATER OR EQUAL 500000 | User: Randy Greening | Final Rejection |

Final Approval Actions

| Action | Type | Description |
|--------------|--------------|-------------------------------|
| Record Lock | Field Update | Unlock the record for editing |
| Field Update | Field Update | Update Proposal Approval Date |
| Field Update | Field Update | Proposal Approved |
| Email Alert | Email Alert | Proposal is Approved |

Pricing & Product Standardization

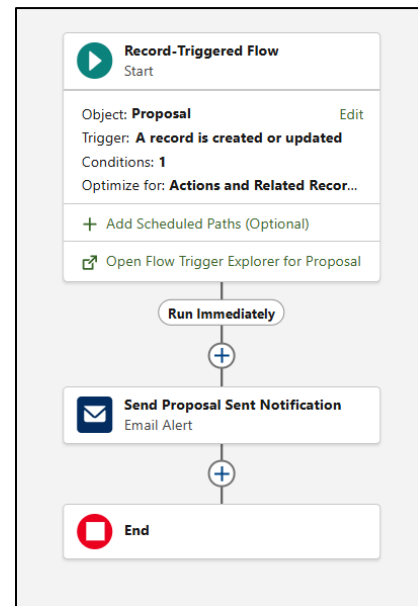
- Configured custom price books and products in Salesforce to enforce consistent pricing and support future pricing analysis.
- Templates now pull standardized pricing and product data, ensuring proposals are accurate and consistent.
- The system allowed flexibility to handle clients with unique pricing or proposal requirements.

Automation & Notifications

- Automated email alerts notify managers when opportunities are stale or inactive for 2+ weeks, prompting proactive follow-up.
- Assignment and approval flows track proposal status in real time, reducing bottlenecks and improving sales velocity.

Dashboards & Reporting

- Real-time dashboards provide visibility into pending approvals, proposal status, and opportunity health.
- Managers can identify stalled proposals, pipeline gaps, or workflow bottlenecks immediately.



Outcomes

- **Proposal creation reduced from 60+ minutes to just 3 clicks, saving significant time for sales reps!**
- Errors and inconsistencies eliminated through automation and standardized templates.
- Internal approval process enforced compliance and proper governance across proposals.
- Standardized pricing and product data improved accuracy, reporting, and operational efficiency.
- Alerts and dashboards increased visibility and accountability, ensuring proposals are reviewed and followed up promptly.

Lessons Learned

- **Process discipline is critical:** Automating proposal generation is only effective when teams follow consistent processes and approval workflows. Clear rules and thresholds prevent errors and missed approvals.
- **Handle edge cases:** Fast-moving proposals for urgent or emergency situations require flexibility in the workflow to avoid slowing down critical deals.
- **Standardization with flexibility:** Standard templates, products, and pricing improve consistency, but flexibility is essential to accommodate clients with unique pricing or proposal requirements.
- **Standalone price books for complex clients:** For clients with task-order or multi-year engagements, separate price books ensure correct pricing is applied consistently each year, avoiding confusion and errors.
- **Adoption and training:** Ongoing training and reinforcement are essential to ensure teams use templates, workflows, and dashboards correctly, maximizing the value of automation.