Document, Presentation and Report Generation for Salesforce

Mark A. Whiteside
COO & Co-Founder
Conga

CEOCFO: *Mr. Whiteside, what is the concept behind Conga®?*
Mr. Whiteside: The concept behind Conga is to gracefully extract and present data from Salesforce through familiar Microsoft Office solutions such as Word, PowerPoint or Excel, plus HTML email and PDF forms. Getting data out of Salesforce is a challenge for Salesforce customers, and we solve that problem.

CEOCFO: *Was it a matter of writing the right programs or understanding the needs? Once you had the idea what was involved in getting it accomplished and coordinated?*
Mr. Whiteside: Conga began as an experimental product designed to generate mailing labels and letters from Salesforce.com. It became Conga Mail Merge, which we released in January of 2007, and it took off. One thing led to another and before long we were generating – in addition to Word documents – PowerPoint and Excel files, and the business just ran away with us.

CEOCFO: *Had anything similar been tried in the past?*
Mr. Whiteside: I think there were a couple of small starts by other parties, but no one had ever fielded anything that worked as well as this did. The product enjoyed its early adoption through the nonprofit community, a very significant focus of Salesforce's overall corporate strategy. From there it caught on with the Salesforce consulting community, a critical audience that has been pivotal in nurturing the growth of our customer base from SMBs to the Fortune 500.

CEOCFO: *Is there anyone using Salesforce that could not use the help or that does not find the need for it?*
Mr. Whiteside:
We solve a problem that every single Salesforce customer has. Without Conga Composer, whenever you need to generate a quote, a contract, a presentation or a report that contains information from Salesforce, it is a very time consuming, tedious process. For example, it could be an account plan where there is data relevant to a given customer or prospect and that data is stored in many places in Salesforce. If you don't have Composer, extracting this data is typically accomplished by people copying and pasting manually from Salesforce into Word, Excel or PowerPoint. It is an extremely manual process, invites errors, inconsistent formatting and delivery of the final output. We facilitate fully automatic solutions that gather the data, generate and distribute the output to address all of those business challenges.

CEOCFO: *Does the Salesforce user world know about Conga Composer?*
Mr. Whiteside: Yes they do, and Conga Composer is today – and has been since the first year following release – among the most popular applications on the Salesforce AppExchange, the electronic marketplace from where customers can access nearly 3,000 powerful add-on products. Since the fall of 2007 Composer has been in the top ten of all applications and for the last couple of years the number one paid solution. Still, Salesforce is adding new customers at an extremely rapid pace, so we have a long way to go.

CEOCFO: *How will your recent funding help you in that direction?*
Mr. Whiteside: The investment by Insight Venture Partners is going to help us attract additional talent; people with experience in growing companies way past where we are today. It will help us all areas of the company, from development, marketing, and sales to operations and customer success. It will also allow us to expand our presence internationally. We have offices today in London and Sydney, and we will be strengthening those operations as well.

CEOCFO: *What has changed in your offering over time? How is Conga Composer better today than when first introduced?*
Mr. Whiteside: The product capabilities have been almost exclusively customer-driven from the very first release of the product. In fact on the very first day that we introduced it at a Salesforce event in San Francisco, we had feedback on the show floor that day regarding capabilities that potential customers wanted. It's evolved from a fairly simple solution to one that supports sophisticated document generation capabilities in not only Word, but PowerPoint, Excel and HTML email solutions. Output options have grown to include email and e-signature solutions such as Adobe EchoSign, DocuSign and Sertifi. Going further, all these solutions can be launched on demand, triggered by events, or set up to run on regular schedules. To this day customer and partner requests are still what drives the evolution of the product. It is as much a customer / partner story as it is about our internal vision.

CEOCFO: *Everyone claims to have ease of use and for people using Salesforce that is a pain point. How have you been able to develop Conga products so they live up to everyone wants and needs?*
Mr. Whiteside: With ease of use there are really two different audiences. The first is the end user, for whom Conga's solutions typically exist as a button or a link on a page. Literally, all the user has to do is click that. When they do, Composer generates and distributes the output to the predefined destination. Composer can return the output to the user's browser, attach it back to Salesforce record, or distribute it via an eSignature solution or attach it to an email. That is all seamless as far as the end user is concerned. It is one click, and the job is done.

From the standpoint of the Salesforce administrator who is tasked with creating the solution, the bits that are needed to make it work for the end user are things with which every Salesforce administrator is already familiar, such as standard Salesforce reports and Microsoft Word. Conga Composer just lets them stitch those together in a way that they had never been able to do before. They're often up and running with the basics of a solution in less than an hour.

> "We solve a problem that every single Salesforce customer has. Without Conga Composer, creating anything like a quote, a contract, a presentation or a report with information from Salesforce is a time consuming and tedious process." - Mark A. Whiteside

CEOCFO: *You have a couple of different offerings. Would you explain the difference and what is available today?*
Mr. Whiteside: The flagship product is Conga Composer, which lets an administrator define the data, the template and the delivery method so their users can click on a button or link to create and distribute a document, presentation or report. Two key add-on products – Conga Conductor and Conga Workflow enable customers to generate batched, scheduled or event-driven documents.

That is about six thousand customers in more than forty-five countries with about one hundred and fifty thousand users worldwide who have generated more than 110 million documents to date.

A separate product, Conga Courier, is a very simple product that takes perhaps ten minutes to set up, but it lets Salesforce customers share data from any Salesforce report with anyone – basically any Salesforce user, Lead or Contact. An example would be the need to distribute new leads to my dealerships across a particular region. I'd set up Courier to run on a schedule at the end of every business day to generate a report and email it as an Excel file to all the desired recipients. It is a very simple product, but it solves a pressing need. Typically, the alternative is for someone to manually generate a report, save it to their local drive, launch an email message, address the email message to the desired recipients and attach the saved file and finally send the email. Conga Courier automates the process.

CEOCFO: *Is there a common thread among your customers, such as a particular industry, size or type of company?*
Mr. Whiteside: Conga products have enormous appeal to Salesforce customers large and small and across all industries. Interestingly, we do not see a great difference in the nature of solutions that are deployed by Fortune 500 customers or customers with forty or fifty users. The solutions are ubiquitous across all verticals and all different sizes, from the small business all the way up to the big ones.

CEOCFO: *Giving back and community involvement is important to Conga. Where do you focus and why is it important for you?*
Mr. Whiteside: I think the concepts behind the original Salesforce programs are good ones. In addition to helping our community, it gives our employees a chance to devote some of their time to causes that are important to them. It does not have to be something that is blessed by Conga management. They can pick any nonprofit or charitable cause they care to

devote energy to and take time off to go make a contribution, whether it is in their community or somewhere further afield. We think that is just a good policy for the company to have, and we think it helps employees appreciate their own circumstances and gives us a little bit better sense of the community at large around us.

CEOCFO: *What surprised you as Conga has grown and developed?*
Mr. Whiteside: I think what surprised us was how much great service resonated with partners and customers. I remember early on answering the phone one day and the caller said, "Oh, I'm sorry, I wasn't expecting a live person, I was expecting voice mail!" In the course of that interaction and many others that followed, we discovered our customer support was a huge differentiator. Support is complimentary. None of our business analysts are on quota or commission. They are salaried employees, and their job is to do whatever it takes to help the customer get a solution up and running. It is great to have a solid product, but people will sometimes call us and say, "Listen, this is not really a Conga question, but I cannot get anyone else to help me. Can you help me fix this Salesforce issue?" Being willing to do that, within reason, has created a certain level of loyalty among our customer base that is really an amazing asset for the company overall and really is responsible for much of the business that comes our way. It was really a shock to us to find that just that aspect of a business culture could have such an amazing impact on our business.

CEOCFO: *Why use Conga?*
Mr. Whiteside: Conga Composer and our other solutions makes the average Salesforce user's experience with Salesforce a dramatically more gratifying experience and helps boost overall user adoption. Our solutions considerably reduce the amount of time it takes to accomplish routine tasks and generate customer facing and internally facing output from Salesforce. By streamlining their business processes with a Conga solution, our customers allow their users to focus on what they do best: their individual skills, whether that be sales or marketing or customer support or service. This is really the essence of what Conga solutions provide the customer – a greatly enhanced user experience and productivity.

Part of the company culture here is one where people come to work every day and have the benefit of being able to help customers, prospects and partners get their business working in a way they have not been able to do before. Every one of our business analysts, every week, has someone say to him or her, "You changed our business. The experience we have when we come to work each day is better than it used to be because of Conga." That kind of a comment is not something that many people enjoy in their day-to-day work. It's what drives us, what drives a lot of our culture. It is really an amazing experience.

Interview conducted by: Lynn Fosse, Senior Editor, CEOCFO Magazine

For more information visit:
www.congamerge.com

Contact:
Paola Di Palma
(303) 465-1616
support@congamerge.com