WHITEPAPER

From ambition to execution: transforming the revenue lifecycle with next-generation AI agents

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Today, AI is a pressing enterprise priority. Many organizations have allocated significant budgets to generative AI (GenAI) initiatives, and executives are becoming increasingly impatient to see returns. Yet there is a widening gap between ambition and execution.

According to Gartner, at least 30% of GenAI projects will be abandoned after proof of concept by the end of 2025.

30%

As more organizations begin experimenting with Agentic AI to harness its efficiency and cost-saving potential, it's essential that these initiatives are pursued with structure and clarity. Businesses must be aware of the potential pitfalls and blind spots that could derail success.

Agentic AI projects can fall short of expectations for a variety of reasons, including:

1. Poor system design that results in suboptimal agent enablement
If organizations attempt to build AI apps and use cases in a manual, one-off fashion without the ability to unify disparate tools and integrate data from across systems, it will likely lead to suboptimal outcomes.

Without a centralized framework and a creation, orchestration, and management layer, organizations' AI agents will steadily multiply—yet they'll be unable to work together. As a result, the value they create won't accumulate; it will fragment.

2. Lack of context and semantic enrichment
Just as humans find it challenging to switch between multiple applications, AI agents will struggle with fragmented data sources, especially if they don't have a semantic understanding of the data model they are operating on.

When processors lack access to semantic understanding, misapplication of fields can result, leading to confusion, inefficiency, and poor agent performance.

The path to success

Success lies in crafting a modern data architecture and systems where agents—rather than the underlying data systems—communicate with one another. Agents are overlayed on systems of records and use common protocols to connect and coordinate, enabling the seamless management of complex tasks.

PwC recently released Agent OS is designed to help customers achieve precisely this outcome. Think of it as an operating system for agents—a switchboard, control center, and collaboration hub in one. It enables agents to share context, operate across platforms, and learn from one another.

The system emphasizes using agents where they are most effective rather than forcing them to handle data from unrelated systems. Each agent focuses on its specific tasks and communicates status and handovers efficiently, similar to how people work in real-world scenarios.

Conga and PwC: leveraging protocols to solve customers' most complex revenue questions

When PwC Agent OS meets The Conga Advantage Platform, that's where the magic really happens. With Agent OS and Conga, organizations can start leveraging intelligent agents where they work best rather than continually reinventing the wheel.

Importantly, Conga and PwC are the only partners to create an architecture and data model explicitly built around organizations' entire revenue operations lifecycle: CPQ, CLM, billing and obligations management, and renewals management.

Our autonomous assistants operate across all your revenue processes, gathering data from various sources, such as:

- Historical precedents
- Regulatory frameworks
- Approved clause libraries
- CRM records

Our protocols are designed to ensure agents interpret data in context, check product compatibility or compliance rules, and present recommendations or next steps via conversational interfaces. Every step in the lead-to-order and order-to-cash processes is automated and optimized, enhancing efficiency and revenue outcomes.

Agent first platform

External data and agent

Data security and RBAC respected by each vendor agent

Data + semantic context = higher performing agents

Different permissions on different MCP servers

Interact with Conga agents from any interface

External data source → ERP agents

External data source → CRM agents

External data source → Procurement agents

Semantic agent orchestration (MCP client) e.g. PwC AgentOS

Conga revenue agents

Quote agent	Pricing agent	Approval agent	Conga agent marketplace
MCP Server	MCP Server	MCP Server	MCP Server

Conga unified data model

- Copilot insights and automations embedded everywhere
- Semantically enriched data model for agent performance optimization
- Data model enriched via AI processing and business use cases
- Cost efficiency (Control token utilization)

Conga UI

Other enterprise UI

Microsoft Teams slack Agentforce

Example scenario

Multi-agent workflow: discount approval and contract update

Let's walk through an example of how our agents work cooperatively to streamline, expedite, and de-risk everyday revenue operations tasks.

Step 1: Seller requests discount

Sales rep finalizes a quote and requests a 10% discount on a high-value deal, triggering an AI-driven approval process.

Step 2: Quote agent approves

Quote agent (which lives in the CRM tool) analyzes the request in real time, referencing historical data. It auto-approves the discount based on similar precedents and business rules, notifying the seller instantly.

Step 3: CLM agent ensures compliance

CLM agent reviews the associated contract and detects an anomaly where the discount exceeds a clause threshold in the MSA. It automatically updates the pricing schedule and inserts a custom clause to ensure legal compliance.

Step 4: Anomaly notification and correction

CLM agent flags the anomaly and notifies legal and sales ops, proposing a resolution. The contract is corrected, rendered compliant, and sent back for eSignature within minutes.

This scenario highlights how Conga's agents collaborate—the quote agent approves intelligently while the CLM agent ensures downstream integrity and compliance. Together, they automate the process from end to end, saving time and minimizing risk.

All this results in better customer revenue outcomes.

Additional strategic insights for business development and risk mitigation

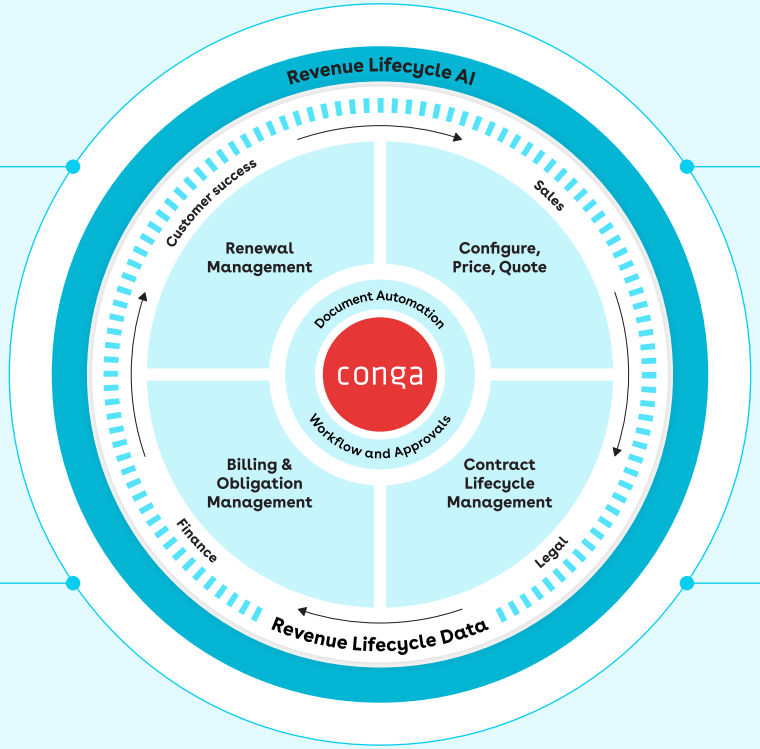
In addition to optimizing daily revenue operations tasks, our agents contribute to organizations' business development and compliance efforts by providing automated reports regarding:

- Which customer segments are most likely to deliver the highest lifetime value, and what specific factors or behaviors you should target to maximize profitability in each segment
- Which customers are most likely to be receptive to upsell or cross-sell offers, and what specific signals indicate readiness for additional products or services
- Which stages in your contract lifecycle management process are causing the longest delays, and how can you improve efficiency while containing risk

Recommendations, insights, and actions across the entire revenue lifecycle

We have identified a renewal risk with a customer. You have had 3 touchpoints in the last month with your customer. Here is a summary and how it impacts your renewal prospect.

Your first two quotes were rejected by the customer, here is what to consider in this round.



Based on market data providing an additional 5% discount on this product can increase the probability of sale by 60%.

This added clause poses a high risk based on your clause library.

Achieve measurable revenue results with targeted AI and agentic AI solutions

Whether your organization is just beginning to explore agentic AI solutions or is ready to scale your capabilities, PwC and Conga can meet you where you are and deploy solutions that prevent redundant workflows, enhance team and agent performance, minimize risk, and unlock sustainable revenue growth.

Email christian.walter.klein@pwc.com to learn more about how PwC and Conga can help you achieve measurable, AI-driven revenue outcomes.

About Conga

The Conga Advantage Platform is chosen worldwide to accelerate the journey to become a more connected, intelligent business. Conga brings Configure, Price, Quote, Contract Lifecycle Management, and Document Automation capabilities together on a single open platform that works with any ERP, any CRM, and any Cloud. Powered by a unified data model and purpose-built AI, Conga helps companies achieve a unique advantage—one built on seamless connection, actionable intelligence, and scalable growth.

Conga delivers an advantage to over 10,000 customers and 6.4 million users around the world. More than 7 million contracts and 46 million quotes are generated annually with Conga. Founded in 2006, the company is headquartered in Broomfield, Colorado and has global operations in North America, Europe, Asia and Australia. Visit conga.com for more information.

For more information

Email info@conga.com or visit conga.com

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