



# Confluence-Based Workspace: Where Knowledge and Collaboration Meet

It's inevitable. The information we use to manage daily tasks and activities often lives in multiple locations: a Confluence wiki, SharePoint, Word, OneNote, email, PDFs, and yes, even Post-it notes. Sales resources are scattered around different systems and platforms. And the specific information for accounts and customers is equally siloed. If information had feelings, it would feel exhausted, overwhelmed, and spread too thin.

Agiloft, Inc. is the global leader in contract and commerce lifecycle management software with an adaptable no-code platform to ensure rapid deployment. The Agiloft Sales Team struggled with a common business operations problem: **dispersed content and a disconnected information environment**. Contentful supported the Agiloft Sales Team objective to harness its collective knowledge into a single source of truth allowing everyone to access answers and resources, quickly and reliably.



## USE CASES

Content/Information Architecture,  
Wiki, Project Management



## TECHNOLOGIES

Agiloft CLM, Confluence, Microsoft  
SharePoint



# Implementing user-friendly online source of truth

Contentiful designed, architected, and implemented a team launching pad, affectionately known as the “Agiloft Sales Space.” The space was a user-friendly, Agiloft-branded, Confluence-based site dedicated to (1) providing an easy-to-follow onboarding path for new team members; (2) mapping out the team’s engagement process; and (3) creating a quick-access area for sales team members to obtain frequently used resources.

## Transforming how sales teams collaborate

The “Agiloft Sales Space” brings all that information together in one place. For easier accessibility and reliability. Contentiful helped Agiloft meet all its goals, which include sharing resources, accessing relevant and current tools, streamlining team onboarding and training plans, and infusing the engagement process into daily operations.

### Problem 🤔

Information is in multiple locations and the team is often working with different version of the same document.

Each sub team with the larger sales team had different onboarding and training practices.

Sales team members were unsure of the process stages, what happens at each stage, and who was involved.

### Solved 😊

Agiloft Sales Space provided a command central (with inherent versioning) to store ALL that pertinent information.

Agiloft Sales Space established a launching pad for new team member training.

Agiloft Sales Space integrated team responsibilities and related tools throughout the engagement process.



## Problem 🤔

How many clicks does it take to get to the resource I need?

Everything we get a new platform, it becomes a “dumping ground” for all the team information.

## Solved 😊

Agiloft Sales Space links directly to relevant tools, resources, and procedures—no matter the platform.

Agiloft Sales Space cuts out the noise so you’re only keeping what’s essential.

### Feature 1: Centralized sales team training and procedures



#### Training and Procedures

[Sales Home](#)

##### New-to-the-Team Training

Are you new to the team and ready to kickstart your training?

✔ Dig in deeper on the [New to the Team](#) page.



##### Team Training Plans

If you have completed your focused first week and are ready to dive into your team-specific training...

✔ Navigate to the [Team Training Plans](#).

##### Sales Procedures

Procedures are an instrument to help you get the job done. If you're need a refresher...

✔ Jump over to the [Sales Procedures](#) page.

##### Team Resources

Looking for a specific resource, but don't want to go on an archaeological dig to find it?

✔ Check out the [Team Resources](#) page first.



## Feature 2: One-click access to frequently used team resources



### Team Resources

< Training and Procedures

This area curates the most accessed, most used sales resources—provided by you and updated dynamically for your convenience. Find all the guidance you need as you navigate through the world of Agiloft sales resources.

To neatly capture and organize these resources, we've created the following six categories:

- Company Info
- Sales Training and Guidance
- Product/Solution Info
- Customer Examples
- Prospect and Engagement
- Handy Tools



**RESOURCE KEY:**

- = File download
- = Internal wiki
- = Agiloft website
- = External site

The following is a list of convenient links to resources that you need right at finger tips, for when you're on that all-important sales call and don't have the time to drill down more than a click or two. You can also find additional resources in the **Collaterals** table and the **Email Attachments** in the Opportunity record of EW Support.

COMPANY INFO	TRAINING AND GUIDANCE	PRODUCT/SOLUTION INFO	CUSTOMER EXAMPLES	PROSPECT/ENGAGEMENT	HANDY TOOLS
Sales Team Directory	Bookmark This! Quick Links	Agiloft CCLM Multi-Year Roadmap	Capterra Customer Reviews	Agiloft Data Sheets	Time and Date Calculator
Sales Team Org Chart	Forecast and Workflow Status (WIP)	Agiloft Solutions	Featured Customers	Agiloft White Papers	World Clock
Corporate Org Chart	Agiloft CLM Standard RFI	2020 Gartner Report: Magic Quadrant for CLM Magic Quadrant for CLM	Customer Case Studies	Customer Success Program Benefits	Time Zone Map
Employee Directory	RFX Response Process Journey	2020 Gartner Reports: Critical Capabilities for CLM Critical Capabilities for CLM	Customer Video Testimonials		




# Feature 3: Final designation of the Sales Procedure Manual



## Sales Procedures

< Training and Procedures


### Your Primary Resource

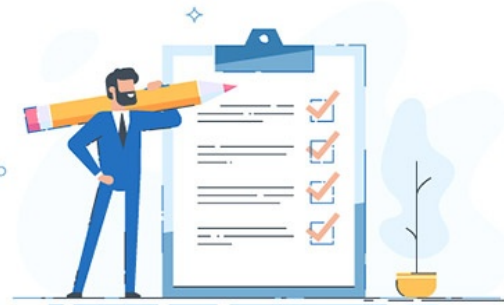
 This area will become the final home of the **Agiloft Sales Team Procedures**. For now, you can access the all-encompassing resource here: [Procedures > Sales Team Procedures](#)

A company that keeps its sales team well-informed and supplied with all the resources needed to do the job successfully will thrive. One very important resource for the Agiloft sales team is the **Sales Team Procedures (STP)**. The legacy name is the **Sales Procedure Manual (SPM)**.

This “resource of all resources” is the sales team’s bible of sorts. It is a comprehensive resource that contains the tools and information you need to effectively conduct sales activities for Agiloft’s prospective customers. The STP functions to ensure all team members are:

- On the same page
- Getting the same understanding about how things are done
- Following company-approved processes
- Complying with corporate and sales standards


Sales team members can accomplish these things, and more, by using, and regularly referencing, this trusted, go-to resource. The mighty STP. Keep it close. Better yet, bookmark it! 



### Procedure Changes

Don't spend all day hunting down updates to existing procedures.

Check here for recent changes to sales-specific procedures and other sales-related procedures on the wiki. **Recent** means changes that have been made within the past month.

-  [Request for Information and Proposals \(RFIs and RFPs\) \(Procedures\)](#)
-  [How to Request Time Off and Check your PTO Balance \(Employees\)](#)
-  [2021 USA Holiday Schedule \(Employees\)](#)
-  [Security Fundamentals \(Employees\)](#)
-  [Submitting an Order \(Partner Training\)](#)
-  [Handling Security Information/Insurance Requests for Prospects \(Procedures\)](#)
-  [Gold Stars \(Employees\)](#)
-  [Refer a Candidate for an Agiloft Position \(Employees\)](#)

Let's connect  

