



Industry Software	CRM Salesforce	Company Size 9,000+ employees worldwide
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Autodesk is the leading software provider for people who make things. As a multinational company, they help millions around the world collaborate, design, simulate, and fabricate their ideas in 3D with software like AutoCAD, Revit, Maya, 3ds Max, Fusion 360, Sketchbook.

The Problem

As an international software company with millions of customers around the world, Autodesk’s expansive sales team needed an enterprise tool to streamline its global communication efforts and improve internal sales processes. Most importantly, they were looking for a robust solution that easily integrated with their single source of truth, Salesforce.

Manager of Sales Execution Strategy, Travis Evans, knew that Autodesk’s current workflows included duplicate tasks, data gaps, and disruptive bottlenecking. He also understood that Autodesk was aligning its efforts to become a more customer-focused company – delivering better results on a massive scale. Their process for building, sending, and tracking both client-facing and internal sales documents via PDF email attachments was undeserving both their sales development and technical sales teams.

For a company as large as Autodesk, their issues occasionally flowed up the chain of command too. Ultimately, they required a solid internal sales enablement tool to accurately organize stage validation, forecasting, and top-down visibility. To ensure long-lasting, company-wide efficiency, Autodesk sought a document solution that would:

- Integrate seamlessly with its existing business systems
- Provide in-depth document tracking and reporting
- Attract and retain company-wide adoption and usage
- Centralize the location of sales document data and activity
- Scale to meet the internal demands of growing teams

However, Autodesk’s biggest challenge was that they needed to successfully complete an organized implementation for over 300 new users – the stakes were high.

The Solution

Being an innovative software leader, Autodesk prototyped an in-house solution to improve cross-team sales dialogue and deliver results back to customers. Yet as the problems snowballed, the leadership team tapped the market to see if there was a more comprehensive, long-term solution.

After extensive research, the Technical Sales Leadership team at Autodesk selected PandaDoc because it checked-off every demand they had:

- A scalable, customizable integration with Salesforce
- A powerful, bi-directional API sync with comprehensive reporting tools
- An ability to intricately track and analyze documents for sales validation
- A sleek user interface for a seamless implementation and adoption

Ultimately, PandaDoc became an integral part of Autodesk’s mass communication strategy. By opening up access to PandaDoc for the entire sales organization, Autodesk quickly stumbled upon use-cases they hadn’t previously considered. Their template repository and content library exploded with new and useful branded materials – eliminating repetitive steps and vastly expanding customer communication.

Travis recalls advancing PandaDoc adoption inside their organization with some nifty cross-team collaboration.

“In order for this to be successful for such an important part of the business, we assigned internal teams to oversee different aspects of PandaDoc. We now have an adoption team, a design team, and a support team that all specialize to make PandaDoc more integrated company-wide. We’re a well-oiled machine thriving off of PandaDoc.”

– Manager of Sales Execution Strategy, Travis Evans

Given the scale of PandaDoc’s implementation at AutoDesk, Travis was curious and hesitant at the first mention of transitioning to a new editor. But he knew the benefits would outweigh any hiccups encountered during content migration. The latest version of PandaDoc, also known as **Editor 2.0**, features real-time collaboration, a simplified document builder and editor, and super flexible design capabilities.

Travis was relieved that the editor was extremely intuitive which immediately eliminated his concerns. Although there was a bit of content to convert, AutoDesk took this as an opportunity to reevaluate over 60 templates to pare them down and optimize the remaining features.

The new modern interface of Editor 2.0 allows the AutoDesk team to fluidly create content and seamlessly deliver it to customers. The company now loves the ability to **control margins, add complex content blocks** without custom CSS, and how easy it is to create repeatable, scalable custom content for their documents. The Editor 2.0 workflow “hacks” enable users to produce custom content faster than ever before.

The Results

Perhaps PandaDoc’s biggest impact on Autodesk is their newfound ability to track sales effectiveness across the entire organization. This partnership allows entire departments to tie documents to dollars – showing value in an entirely new way.

“PandaDoc has opened eyes at our company on how important data is and how much it can help the company grow.”

– Manager of Sales Execution Strategy, Travis Evans

Furthermore, due to how large and widespread Autodesk is, their CRM hygiene can drastically affect the very lifeblood of their corporate existence. Therefore, internal compliance for teams that consist of thousands of employees is critical. Autodesk uses PandaDoc in a unique way to ensure their intricate sales cycle is devoid of manual entry errors. Workflow approvals between teams are now simpler and smoother than ever with PandaDoc.

Moreover, Autodesk is able to easily squeeze PandaDoc into their tech stack with an open API. They sync all of their data out of PandaDoc and into their CRM with ease and precision. What’s more, the data they’ve already aggregated doesn’t sit siloed upmarket – they’re transferring it into existing, preferred dashboards for everyone to view.

Lastly, Autodesk is delighted to leverage PandaDoc’s content repository and template library for cross-functional projects. Designers, brand managers, and technical sales reps love how easy it is to train new users on the tool. With a slick UI, reps are up and running quickly, eliminating excessive steps in building and sending docs. As a result, the Autodesk sales team is more consistent and organized than ever, making it easier for them to focus on meeting and exceeding their sales goals.

“Email is where deals go to die. Replacing our workflow with PandaDoc gave life to our sales team.”

– Manager of Sales Execution Strategy, Travis Evans