



Industry
Software

CRM
Salesforce

Company Size
51-200 employees

Chili Piper, a sales technology pioneer, transforms how B2B revenue teams do business. Their innovative scheduling platform is used by Square, Intuit, Twilio and over 300 thought-leading companies to convert leads into meetings and prospects into buyers.

Saved 15 minutes per contract

Streamlined company-wide workflows

The Problem

As a fast-growing tech firm, Chili Piper’s revenue teams were quickly outgrowing their initial sales processes. With an ever-expanding enterprise customer base, they required a centralized place for contract management – a tool that could make Account Executives more responsive and clients happier.

Their process had sales reps sending out invoices from PayPal and marking deals as closed-won only after receiving payment. Account Executives (AEs) who wanted to put their best foot forward with clients were weighed down by the inefficient document workflows in place that made negotiations and signing challenging.

Revenue Operations team member Scott Haney said, *“We were at a point where we needed to make the switch from cash to accrual accounting, and that couldn’t happen without a contract management system in place not only for documentation reasons but also to help finance deliver invoices to new clients and better manage revenue recognition.”*

Other departments at Chili Piper felt the effects of bottlenecked contracts and chaotic document organization. HR, marketing, and Revenue Operations (Rev Ops) alike realized that a tool to create, send, and track their documents was no longer a “nice-to-have”, it was a need to have, and fast.

The Solution

After initial research, Chili Piper’s leadership team identified PandaDoc as the best solution to quickly enhance their growing sales needs.

Chili Piper’s Rev Ops team integrated PandaDoc with their CRM, Salesforce, built custom document templates and trained their entire team on how to use the tool in less than a week. The [Salesforce integration with PandaDoc](#) was a major selling point for Chili Piper as it eliminated the need to manually transfer customer data from their CRM into their documents. The 2-way sync between Salesforce and PandaDoc automatically changed fields on a Salesforce object so that their sales records were always accurate and up-to-date.

The team was thrilled with PandaDoc because it resolved all of their document workflow challenges across multiple teams. PandaDoc gave Chili Piper a tool that:

- Speeds up contract creation time and eliminate errors for RevOps
- Allows for easy invoicing and renewals for Finance
- Enables AEs to quickly close deals with professional e-signatures
- Tracks and measures growth within existing systems for leadership

Thanks to the integrations, payment functionality, and other time-saving features of PandaDoc, Chili Piper’s internal processes became as streamlined as the product they were selling.

The Results

Since implementing PandaDoc, Chili Piper’s global team has seen widespread adoption across the entire revenue organization, including practical applications on the Sales, Finance, Rev Ops, and leadership teams.

“The biggest plus with PandaDoc is the 28% increase in close rates our reps have seen, followed closely by the nearly 12 hours per week we’ve been able to save when creating, storing, and sharing sales documents.”

– Revenue Operations, Scott Haney

PandaDoc’s intuitive templates, secure payment processing, eSignature functionality, and streamlined document storage remedied the major pain of Chili Piper’s Rev Ops team while improving the day-to-day for the rest of the organization.