



Switched from DocuSign	CRM used Salesforce
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OpMentors is a technology solution consulting firm focused on FinancialForce and Salesforce customers. Their business experience helps them translate complex business challenges to simple and effective solutions for organizations of any size.

24% increase in revenue	27% decrease in sales cycle
90% decrease in doc creation time	

The Problem

OpMentors, as a consulting firm focused on open communication to their customers about the current status of their projects. This, in addition to generating quotes and proposals, is a document heavy process. The sales team often generates a ton of SOWs to present complex solutions. These often take hours to create.

“Giving our customers the ability to use a tool to easily read and sign off on the agreements smoothly and seamlessly is invaluable. In addition to the simple customer experience, the document creation and analytics are extremely compelling and have helped increase the effectiveness and profitability of our business.” **Machell Enke, Managing Partner**

The Solution

Before utilizing PandaDoc, OpMentors managed their document creation using Google Docs, and DocuSign. The process to create, edit, send, and get documents signed was labor intensive and a mostly manual process. Utilizing the PandaDoc templates was a massive time saver and is one of the many features that save OpMentors hours during the creation of each document.

“Being able to send a customer a complex proposal or quote in minutes versus hours or days after speaking with them has dramatically impacted our success, and impressed our prospects. Ultimately, PandaDoc has given us the ability to focus on actually scoping the work rather than just creating the document.” **Jocelyn Fennelwald, Managing Partner**

PandaDoc was the most cost-effective solution, and the robust integration with Salesforce added additional value. Using the content library and versioning control functionality has also saved time and “many headaches.” Additionally, OpMentors loves the advanced analytics. It’s easy to know when a customer has viewed an agreement, and where they may have concerns or questions based on the page level viewing data that PandaDoc provides.

The cost and speed of implementation was the final factor in determining that PandaDoc would be the solution that OpMentors would use internally AND recommend to their customer base that needs assistance managing their document processes.

“Using multiple platforms creates frustrating and inefficient processes. PandaDoc is smooth, seamless, and impactful.” **Kyle Enke, Director of Practice & Business Development**

The Results

PandaDoc has accelerated the growth and efficiency of OpMentors. The sales teams have seen deal sizes increase by 18%. PandaDoc also enabled the average sales cycle to decrease by 27% because of the intuitive and straightforward processes of creating and signing documents. The hours that complex quotes took to build now takes minutes. Another added value is the uniformity that each quote has from a brand perspective.

With PandaDoc, being able to set expiration dates of documents, and set automatic reminders has helped increase close rates, and remind customers that they need to sign without any additional work by the sales team. The ability to manage and more accurately forecast sales has also improved after implementing PandaDoc. Revenue has increased by 24% since implementing PandaDoc.