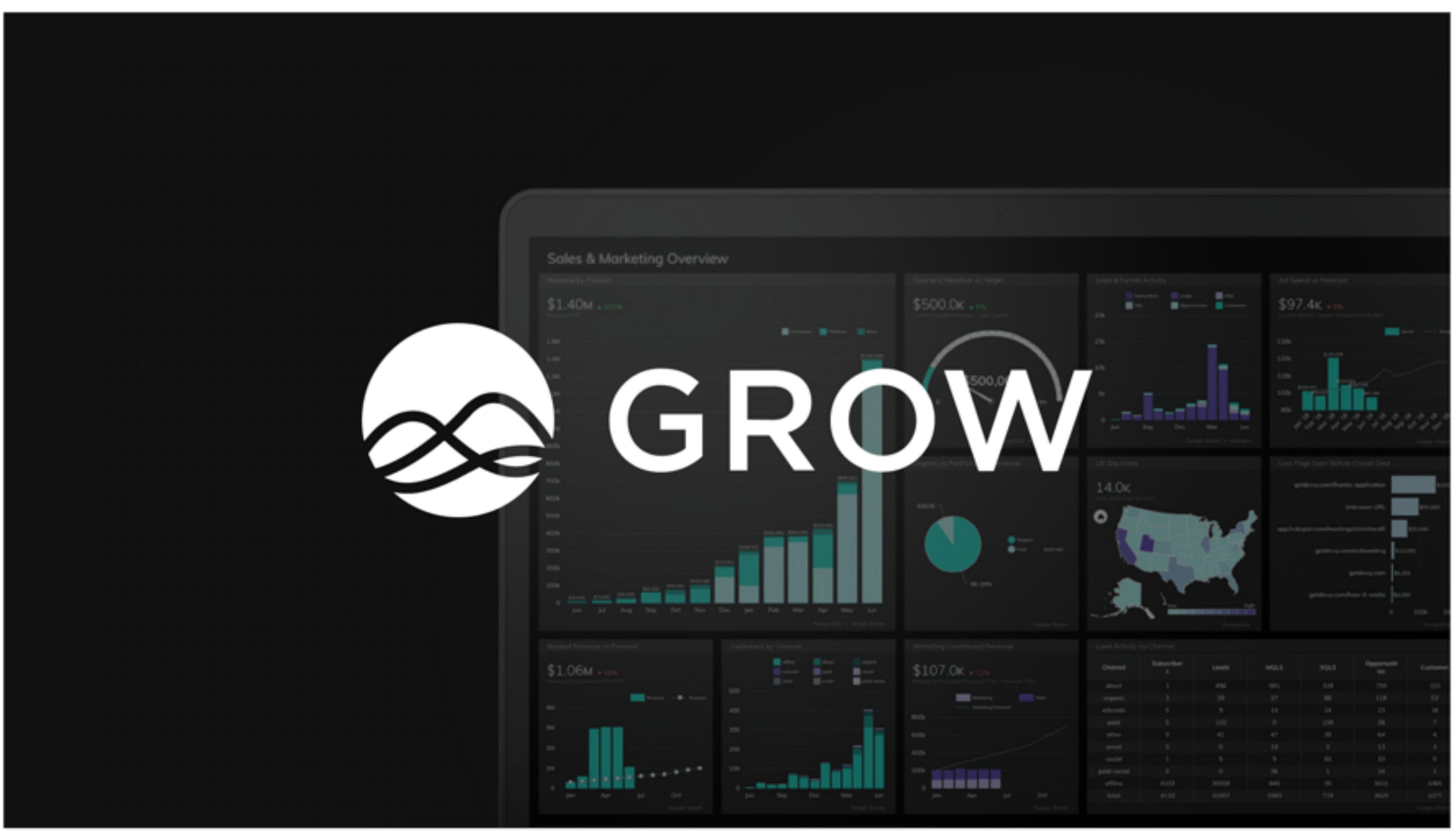
Grow

PandaDoc



Industry
Information Technology & Services

CRM
Salesforce

Company Size
51-200 employees

Grow helps companies accelerate their growth by aligning and engaging teams with real-time data. Grow aggregates scattered data from spreadsheets, databases, and cloud SaaS tools (Quickbooks, Salesforce, etc.) to create custom BI dashboards that easily cross-analyze data from multiple sources, creating insights unique to each business.

75% less time to get a document out

Customizable on-brand documents with rich media elements

Greater insights into the sales funnel

The Problem

Before Grow signed up with PandaDoc, their Sales and Customer Success teams used a very basic eSignature tool to handle their business documents. As Grow grew, so did their need to painlessly send out sophisticated and professional quotes, proposals, and contracts at scale. Issues around janky formatting, limited design options, and subpar automation features were slowing down the team, and the quality of documents going out to customers didn't fit their CEO's vision for a branded and modern style.

"We had a customer once tell us our document looked really bad. That's when we knew we needed something to reflect our growth from the startup phase."

Grow felt they were letting valuable time go to waste by manually creating each document. The lack of automation and CRM integration meant inaccurate information, misspellings, and having to copy/paste information in multiple places every time a change was made to a contract.

The Solution

Tate Stone, Head of Technical & Revenue Operations at Grow made it his personal mission to find a tool that would aid his team in taking the business to the next level.

Grow looked closely at DocuSign and HelloSign before choosing PandaDoc. They needed a platform that was easy to use, with enough flexibility to allow the team to deliver personalized documents to their customers. Grow also needed to deliver sleek, professional, and on-brand documents to establish a strong brand identity.

"The biggest differentiator with PandaDoc is we loved how slick it looked and how easy it is to use. With the other tools, it felt like you were signing divorce papers which is not a great impression when you're trying to establish a new business relationship."

Grow needed the ability to quickly insert branded content like videos, case studies, pricing tables. Automation features and an integration to Salesforce CRM was essential for the team to spend less time building documents and more time closing deals and growing the business.

Grow saw PandaDoc not just as an opportunity to sign digital documents quickly but as a tool that will help them close more deals.

"PandaDoc allowed us to build really nice-looking templates. We loved the ability to insert videos in our proposals where we could explain the value of Grow and why a particular plan was the best fit."

The Results

Implementing PandaDoc allowed Grow to drastically cut down time spent on business documents and significantly increase their output. They went from 30 minutes to 5-10 minutes for each proposal or contract sent.

"The implementation was extremely easy. Within a day, the CS team was using it. "I've implemented 5-6 sales software, and this is one of the easiest, if not the easiest one."

Many of the benefits experienced by the sales team were benefits that other teams could also enjoy. Their customer success and account management teams quickly implemented PandaDoc to automate upgrades, renewals, and any contract changes needed. Grow's volume-based pricing model required the CS and AM teams to send out invoices whenever a customer exceeded the number of uses listed in their contract. Without the Salesforce integration, the process was so painful that invoices sometimes never went out. Grow was able to automate manual processes and capture revenue that would have otherwise slipped through the cracks.

"After PandaDoc, the number of customers that are using more than they are paying for has shrunk a ton. For us, it's been incredibly helpful."

The Salesforce integration not only allowed documents to be filled out almost instantly but gave leadership the ability to capture more insight into the sales funnel's health. They could see how many proposals were sent, opened, and completed for any given time or drill down to the rep level and understand how many deals were in progress for each rep and where those deals stood. It gave their CRO a better sense of where they stood with quota.