

CIO

APPLICATIONS

ISSN 2644-240X
CIOAPPLICATIONS.COM

Salesforce
EDITION



PandaDoc



The annual listing of 10 companies that are at the forefront of providing Salesforce solutions and transforming businesses

CIOApplications

(ISSN 2644-240X)

Published from
600 S ANDREWS AVE STE 405,
FT LAUDERDALE, FL 33301

www.cioapplications.com

PandaDoc

Streamlining Document Management

Founded in 2011, PandaDoc has designed a comprehensive all-in-one document workflow automation platform. It enables businesses to seamlessly create, manage, and sign all digital documents. Today, more than 40,000 organizations utilize the PandaDoc platform to efficiently manage their document workflow.

In an interview with CIO Applications, Sergey Barysiuk, Founder and CTO, PandaDoc, talks about how PandaDoc enables clients to more efficiently run their business.

Please tell our leaders about the mission and vision of PandaDoc.

Our first product was Quote Roller, a proposal and quoting software. The success of the product inspired us to launch the all-in-one PandaDoc platform for frictionless handling of all the documents.

PandaDoc is not a solution that handles one particular problem. Instead, it has been designed from the ground up to create a unified or connected experience. PandaDoc integrates different functionalities—such as proposals, quotes, contracts, eSignatures, and payments—in one single platform. This enables businesses to create a meaningful workflow.

What are the challenges that businesses are currently facing, and how is PandaDoc addressing those?

Businesses typically use Salesforce to design the fundamental sales process. But there is always the last mile when salespeople close a deal. They need to create a document, negotiate it, share it with clients, get their signatures, and collect payment information. It is an extremely complicated and frustrating process for both an organization and its clients. Our solution challenges this status quo and provides clients with a unified experience.

We primarily serve SMBs, who want to offer a great experience to all their customers. PandaDoc is not limited to the document workflow of sales. It can be used to address any and all documentation needs of businesses.

Could you shed some light on how PandaDoc enables clients to get the most of their Salesforce investment?

PandaDoc connects with Salesforce and collects all the crucial information

to instantly create a specific document. Take a proposal template, for instance. Typically, the creation of a proposal has been a tedious manual process, requiring a salesperson to manually update all the details or make the changes. PandaDoc automates the entire process by allowing clients to have all the information on the templates just through a single click.

Users can then share the document with prospects, do the negotiation, incorporate the changes, get it signed, and collect payments. Once



SERGEY BARYSIUK,
CTO, CO-FOUNDER



done, all pieces of information fly back to Salesforce, and businesses can trigger the necessary workflows to move to the next phase of the process.

All these capabilities are packaged in one solution. More importantly, you don't need to spend months doing all the necessary integrations. Clients can just download our package, install it, and they are ready to go.

Could you please cite one or two case studies on how you have enabled clients to overcome hurdles and attain desired outcomes?

The sales team of an international software company, Autodesk, was struggling to streamline global communication efforts and improve internal sales processes. They needed a robust solution that could easily integrate with their single source of truth, Salesforce, provide in-depth document tracking and reporting, attract and retain company-wide adoption and usage, and centralize the location of sales document data and activity. More importantly, they needed to successfully complete an organized implementation for over 300 new users.

PandaDoc checked all the right boxes owing to its scalable, customizable integration with

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

By opening up access to PandaDoc for the entire sales organization, Autodesk quickly stumbled upon use-cases they hadn't previously considered. The client got access to a huge template repository and content library with new and useful branded materials. This eliminated repetitive steps, making customer communication more viable.

Autodesk could easily track sales effectiveness across the entire organization, while streamlining workflow approvals between teams. Autodesk is also 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.

Finally, the partnership with PandaDoc allowed Autodesk to leverage PandaDoc's content repository and template library for cross-functional projects. This played a vital role in making the Autodesk sales team more consistent, productive, and organized.

What are the key factors that differentiate PandaDoc?

PandaDoc is not a solution that handles one particular problem. Instead, it has been designed from the ground up to create a unified or connected experience

Our goal is to make businesses more efficient with document management. PandaDoc eliminates the need for sales teams to undergo multiple back and forth processes to create and share proposals. This significantly reduces the time involved in the process. Admins can have insights into the entire process. They can see which documents are being shared or if salespeople are aligning with all the policies. Admins can have reports regarding the amount of time saved or the process optimization. Document activities are also tracked to help clients understand whether their content is bringing the outcomes or not.

Documents are typically considered static files, but we see them as smart applications. They can adjust according to the pre-set conditions. More importantly, the documents that are created using PandaDoc are highly interactive and eliminate the need for our clients' customers to sift through multiple stages to finalize a proposal. Due to this interactive nature, PandaDoc users witness increased conversion rates and better engagement from their customers. **CA**