

Company



Use Case

CRM Sync

Industry

B2B | Technology

How PandaDoc Automated Salesforce Sync in 30 Days

“ANY RECOMMENDATION I MAKE TO MANAGEMENT REGARDING THE DIRECTION IN WHICH TO TAKE OUR SALES TEAM IS SUPPORTED BY DATA FROM PEOPLE.AI.”

– Matt Lenhart, Sales Operations at PandaDoc

The Challenge

When Matt Lenhart joined the PandaDoc Sales Operations team, he audited the tools they used in order to streamline productivity. He quickly realized that his reps used whatever tools they wanted to, instead of adhering to a standard across the team. Here are the glaring issues that stood out to him:

- Google Calendar was the only tool used across the entire team
- Activity data was not consistently or accurately logged to Salesforce
- There was no single system of record for sales activities and outcomes

The lack of consistency took a toll on sales managers' ability to understand sales activity. Because of this, managers simply did not have the data to understand what their reps were doing and this left them unable to make informed decisions. This was a major barrier to effective ramping and ongoing training at PandaDoc. Lenhart's goal was to get managers and reps on the same page with uniform tools and a way to lay the foundation for customized coaching.

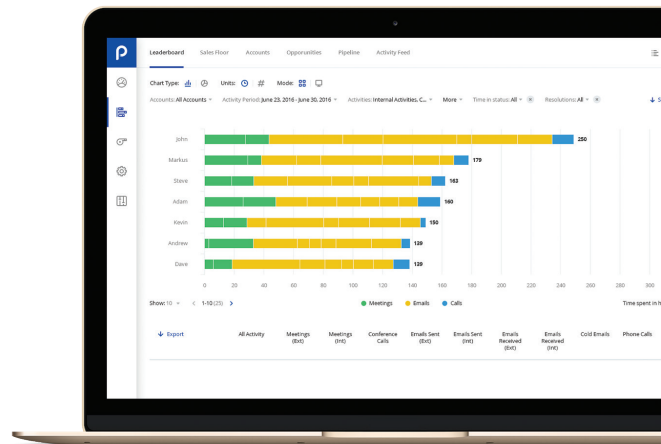
“PEOPLE.AI IS THE SOURCE OF TRUTH WHEN IT COMES TO SALES ACTIVITY.”

– Matt Lenhart, Sales Operations at PandaDoc

The Solution

PandaDoc chose People.ai to gain an accurate view of sales activities and empower data-driven decision making. With People.ai's functionality in their tool belt, PandaDoc now has insight into:

- How long reps spend on different activities
- Which accounts they touch and when
- If their cadence is optimal
- How reps compare to one another



People.ai's Salesforce Sync function provides all of this data whenever PandaDoc needs it. This means that they automatically collect all call, email, and meeting data in order to sync it directly into Salesforce. It's no longer a question of if sales managers have accurate data needed to run their teams, but what innovative things they can do with it to help reps grow and succeed.

The Result



Since implementing People.ai, PandaDoc has seen dramatic improvements in sales efficiency. They no longer have to wonder if the sales activity data they see in Salesforce is accurate and up to date. Instead, they know that all sales activity is logged for their reps, leaving no room for human error. PandaDoc went from spotty sales activity recording to 100% synced in less than 30 days with People.ai. Now reps have more time to spend on revenue generating activities and management is fully aware of how the sales team is doing.

With the help of People.ai's platform, PandaDoc is able to assess the entire lifecycle of rep performance; from hiring to coaching to promotion. They are now able to make informed decisions with around-the-clock access to real-time data.

About PandaDoc

PandaDoc is an all-in-one solution for smarter sales documents. For decades sales reps have been forced to spend countless hours creating sales quotes, proposals, and contracts the hard way. This process involved using dozens of word processors, spreadsheet applications, and unnecessary email threads.

PandaDoc provides easy access to templates and manager-approved content that empowers reps to quickly create client-facing documents using data synced from their CRM. In addition, PandaDoc gives reps a centralized product catalog with automatic tax, discount, and margin calculations included. All documents also contain built-in electronic signatures in order to help reps quickly close deals. Once documents are sent, reps can see how much time clients spent reviewing each section so they can intelligently address objections.



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