PandaDoc

CUT MEETING PREP TIME 40% BY ENLISTING TROOPS

Saw priority lead response time decrease to **UNDER 5 MIN** after using Troops

INDUSTRY	LOCATION	TEAM SIZE
Digital Commerce	Charleston, SC	50 - 100

For a transaction and fast-paced sales organization, every minute matters.

At PandaDoc, a leading document automation platform, the commercial sales team is highly transactional, running the full sales cycle from inbound lead to opportunity closed. With incredibly strong website traffic, it was easy for reps to lose sight of their top of funnel as they worked their opportunities. In addition, the team was growing, and it was becoming difficult for management to keep up with all the activity.

"We opened a second office on the East Coast and I needed a way to hold my reps accountable to certain metrics", said Mike Paladino, Director of Commercial Sales. "In short, I needed real-time notifications to help my team manage their deals and prioritize key indicators".

TAKEAWAYS

PandaDoc had **trouble keeping reps prioritized** as a highly transactional, end-to-end sales organization

Their team, **heavy users of Slack**, brought Troops on board which **immediately focused reps' attention and time** on higher-quality selling activities

The result was a significant **decrease in lead response times** and **big time-savings for management**

" Troops helps our team progress deals faster. It's stellar for mobile reporting for me, and our team can quickly adjust their contacts, leads, and opps.

Jared Fuller, VP of Sales

Finding help with Troops

Mike realized he **needed a way to be accountable for more people without adding headcount**. The team was heavy users of Slack, and bringing automation there made intuitive sense. In fact, the PandaDoc team **had tried to hack together some notifications themselves**, but quickly realized a dedicated tool like **Troops** would provide a much more powerful, reliable, and user-friendly experience.

> " Not needing to hunt for a specific reports has greatly improved my efficiency in 1:1s, enabling me to hold reps accountable to key metrics and keeping me up to date on our priority opps.
>
> -   *Mike Paladino, Sales Manager (SMB)*

PandaDoc uses a combination of Hubspot scores and other specific qualifiers to feed the best leads to reps in real time

Troops APP 1:05 PM
@scott, you've just been assigned a new lead. Reach out [View in Salesforce]
Full Name: Bill Berg
Email: bill@true.co
Company: True Co
Lead Source: Web
Status: Working - Contacted ✅
Phone: (555) 666-7777

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Troops helped save time and increase responsiveness for both sellers and management

The PandaDoc team took to Troops quickly. By bringing key deal indicators and reporting into Slack with Troops, productivity has increased because reps know where to focus their time, instead of following leads and opportunities that have lower chances to convert.

As an example, PandaDoc brought their best leads front and center into Slack through a Troops alert, and as a result have **seen response time decrease to under 5 minutes** - a major win for a team with constant activity. For management, Mike estimates that 1:1 prep time has been cut down by 40%, a major time savings for him and his growing team.