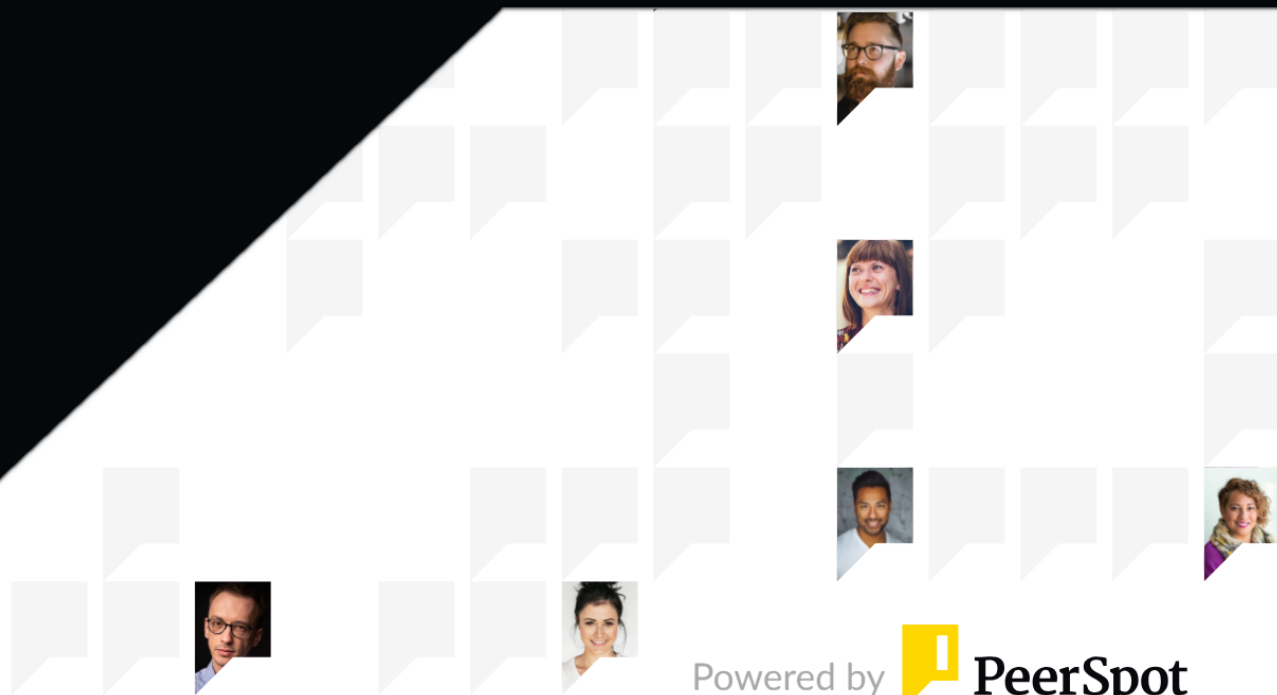




PandaDoc

Reviews, tips, and advice from real users



Powered by  **PeerSpot**

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Product Recap



PandaDoc

PandaDoc Recap

PandaDoc delivers an efficient platform for crafting, sending, and managing digital agreements and proposals, offering streamlined document workflows and robust e-signature capabilities.

PandaDoc is a comprehensive tool that integrates with leading CRM systems like Salesforce and HubSpot, improving document creation and management. Users benefit from its intuitive interface, enabling the efficient use of templates and document tracking features. By supporting time and cost savings, PandaDoc helps reduce manual processes, enhancing client communication and accelerating workflows.

What are the key features of PandaDoc?

- **Templates:** Facilitates quick creation and reuse of documents.
- **CRM Integration:** Seamlessly connects with Salesforce, HubSpot, and Zoho CRM.
- **Document Tracking:** Provides visibility into client interactions.
- **E-Signatures:** Ensures secure and legal digital signature processes.

What benefits should be expected from PandaDoc?

- **Efficiency:** Reduces time spent on manual tasks.
- **Cost-Effective:** Minimizes expenses related to document handling.
- **Automation:** Streamlines approvals and processes.
- **Communication:** Enhances client interaction capabilities.

PandaDoc is extensively utilized across industries for contract management, recruitment, sales proposals, and marketing agreements. Its integration capability and ease of use make it adaptable for creating customized agreements, enhancing efficiency in diverse business operations.

Valuable Features

Excerpts from real customer reviews on PeerSpot:



“PandaDoc is a very powerful tool and is very cost-effective, making it affordable for any size of organization.”



Bitanap Marion

Business Development Manager at Nestle



“We have been able to retain our clients globally, sending documents, letters, and everything through PandaDoc with a professional appearance, and they are able to sign it on the go, especially using their mobile phones, and they are very satisfied with our services.”



Gemam Mosik

Senior Software Engineer at Lee Hecht Harrison, LLC



“PandaDoc is a great tool, especially when sending contracts to my clients.”



Devexa Martin

Java Software Engineer at UPS



“PandaDoc is a game changer for our organization.”



Christine Chelsea

Team Lead at Unilever



“PandaDoc has positively impacted our organization by enabling us to spend significantly less time creating documents, providing a better closing experience for customers, and enabling trusted electronic signatures.”



George Peterson

Data Analyst at a tech vendor with 10,001+ employees



“PandaDoc has positively impacted my organization by significantly improving standardization across the company and efficiency in proposal writing.”



Neliwi Margaret

Business Development Manager at Capgemini



“My main use case for PandaDoc is that it has been a game changer, especially in my organization because it saves our sales reps hours per week on documentation.”



Kirkwood Bernice

Software Engineering Manager at MetLife

What users had to say about valuable features:

“I find the integration with HubSpot to have automated agreements particularly interesting. The best features PandaDoc offers are the intuitive and visual interface, along with how organic the use is. I really appreciate this aspect. Other signing platforms are not as intuitive as PandaDoc, and I value how it integrates with HubSpot for automations.

The design of the interface and the way things are displayed make it very intuitive for me compared to other platforms..”

Verified user

[Read full review](#) 

Jr Legal Ops Anlyst at a tech services company with 11-50 employees

“The most important feature I appreciate about PandaDoc is that in most applications, we have to manually create the template file, but with PandaDoc, we can upload any PDF file and use that as a template. The second thing is that their SDKs for programming languages are excellent. I have used the Java SDK, which provides many features and removes the complexity overhead of using PandaDoc's API. The third feature is the notification structure they provide at every event that occurs in PandaDoc..”

Verified user

[Read full review](#) 

Software Engineer at a consultancy with 11-50 employees

“I appreciate the HubSpot connectivity with PandaDoc, as that is helpful for our team. In my opinion, the best features PandaDoc offers are e-signature, editing, and the connectivity with HubSpot.

PandaDoc has positively impacted my organization by helping to move the approvals faster and get the agreements in. The approvals are now one or two hours faster. The HubSpot integration specifically helps my team by saving time, as we can connect directly from HubSpot to PandaDoc..”

Raya Durai

sales ops lead at a computer software company with 51-200 employees

[Read full review](#) 

“PandaDoc offered the best feature in its template functionality, which made things a little bit easier. We would have everything saved when it came to all the legal jargon, and it allowed us to quickly fill in the table with the job titles and the services, and it would calculate everything immediately. It also allowed us to add video, which was a game changer. More specifically, it really made our lives easier when it came to tracking if someone had opened the proposal or not because we could send them specific links and we could see how much time they had spent even reading a specific page. PandaDoc has positively impacted my organization by enabling faster turnaround times..”

Ricardo Neves

Senior Project Manager at a consultancy with 51-200 employees

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“The best features PandaDoc offers include the ease of creating a document and getting it signed, and the signed copies are also delivered to the parties, which is great.

What makes the document creation process easy for me in PandaDoc is that drafting the document is straightforward.

PandaDoc has positively impacted my organization by helping in creating the document and getting it signed, reducing the manual work of creating and sending it via mail, and sending the signed copies back again..”

Verified user

Devops Engineer at a tech vendor with 51-200 employees

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“The best feature that I love in PandaDoc compared to other tools is that it has variables that when filled up with values, they seem part of the contract, while other contract management companies use the drag and drop feature, which is sometimes good, but sometimes we just want the content to fit in the document.

Another feature that stands out for me would be the ability to pay right in the document, where a customer can pay using Stripe connected with PandaDoc, and that can help us smooth our payment processes.

PandaDoc has a major impact on our workflow. Previously, we had been creating contracts manually, and whenever a client was closed, we had to go to PandaDoc and create it manually. With the integration and the automation that we created, it has improved our workflow and has saved us so much time. I would say at least 10 to 15 hours per week is saved by this..”

Muhammad Haseeb Saleem

Revenue Operations at a non-profit with 11-50 employees

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Other Solutions Considered

“I previously used Adobe Acrobat Sign before PandaDoc. The reason why we switched from Adobe is that it is kind of complex and not so cost-effective compared to PandaDoc..”

Christine Chelsea

Team Lead at Unilever

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“I have not used any alternatives to PandaDoc. I have used other PDF generation tools, which include only PDF generation libraries that are open-source options such as Jasper Report and another option provided by the Java community. I am familiar with those alternatives..”

Verified user

Software Engineer at a consultancy with 11-50 employees

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“I used DocuSign before and I used Simple Sign, but PandaDoc's UI is much easier for your eyes, and the variable feature that PandaDoc has is what I appreciate.

I was already using DocuSign before PandaDoc and had already tried Simple Sign, but after PandaDoc, I stayed at PandaDoc..”

Muhammad Haseeb Saleem

Revenue Operations at a non-profit with 11-50 employees

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“Before using PandaDoc, we used DocuSign, where we were facing many troubles with signature and those kinds of things. After PandaDoc, it has become streamlined. We previously used DocuSign in our company, which was not that great or user-friendly, so we moved to PandaDoc..”

Raya Durai

sales ops lead at a computer software company with 51-200 employees

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“I used DocuSign before and I used Simple Sign, but PandaDoc's UI is much easier for your eyes, and the variable feature that PandaDoc has is what I appreciate.

I was already using DocuSign before PandaDoc and had already tried Simple Sign, but after PandaDoc, I stayed at PandaDoc..”

Muhammad Haseeb Saleem

Revenue Operations at a non-profit with 11-50 employees

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“I wasn't responsible for choosing PandaDoc, so I cannot answer that question, but I use an alternative now at my current job. I'm currently using Scoro, and when it comes to proposal preparations, it seems to hold a little bit more data. That said, Scoro misses the part of PandaDoc where we actually have some more information in a document format while Scoro is more geared towards numbers only..”

Ricardo Neves

Senior Project Manager at a consultancy with 51-200 employees

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ROI

Real user quotes about their ROI:

“I have seen a return on investment because this tool has helped improve cash flow from the ability to collect payments. It helps me keep track of which contracts a client has signed. Templates have allowed me to both standardize proposals yet allowed rapid customization for each specific customer while saving a lot of time..”

Christine Chelsea

Team Lead at Unilever

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“I have seen a return on investment as it allows me to enter into agreements with clients faster. It saves time with creating templates which can be used later. It saves cost, as forty to fifty percent of my cost is saved, especially because I do not have to move from one place to another to go and sign the documents..”

Devexa Martin

Java Software Engineer at UPS

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“Since using PandaDoc compared to my previous process, I have saved time, and it is completed in minutes.

PandaDoc helps with handling amendments to documents, making that process easier and saving time..”

Verified user

Devops Engineer at a tech vendor with 51-200 employees

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“I have seen a return on investment, with huge time savings in drafting and sending documents to clients. Approximately thirty to fifty percent of time is saved in drafting and sending the documents, and I also love the easy-to-view dashboard that saves time in checking the status of any documents and provides insights such as clients' views versus signs. We are able to guide our clients on where to sign and what to do. It has also streamlined the editing and back and forth of documents with clients, as you can turn on suggestions for clients to make changes if required..”

Kirkwood Bernice

Software Engineering Manager at MetLife

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“I can share specific outcomes or metrics that include an improvement of security from 30 to 55%, with a time saving of 60 to 85% when dealing with documents to be signed, and overall administration efficiency has also improved.

“I have seen a return on investment with a quicker turnaround on our contracts, making it a very cost-effective product for our company, saving us a lot of money, and efficiency has increased, with customer experience being great and the tracking ability of our customer's documents being top-notch..”

George Peterson

Data Analyst at a tech vendor with 10,001+ employees

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“I have measured that 70 to 80 percent time and cost savings based on overall experience because before using PandaDoc, some of our clients would travel from far away to come and sign documents or we would meet at a certain point. We were wasting a lot of time, and there were many errors involved. Cost was also a factor through traveling, going to hotels, or meeting points. However, nowadays, we have eliminated all of that. We use PandaDoc where it saves 70 to 80 percent of our time.

“Since starting to use PandaDoc, we have seen a return on investment with how easy it has become for our clients to sign documents. We have been able to retain them, save time and cost, and maintain professionalism. It is very user-friendly for both signees and senders..”

Bitanap Marion

Business Development Manager at Nestle

[Read full review](#) 

Use Case

“We use PandaDoc to send agreements for signature. The agreements we share most frequently for signature in PandaDoc are Statements of Work, contracts, and Master Service Agreements..”

Verified user

Jr Legal Ops Anlyst at a tech services company with 11-50 employees

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“We have been developing their CMS application where we automate document creation and signature flows. I created a CMS application in which clients register, and we generate documents through PandaDoc. Multiple levels of signers approve documents, and at the end, either the client will be registered or we can inform them about missing information that needs to be provided..”

Verified user

Software Engineer at a consultancy with 11-50 employees

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“My main use case for PandaDoc is for agreements and e-signatures. I will be using PandaDoc to generate the agreements after deal closure, and after the agreement review internally, I will be sending it to the client. They will verify, and then we will be sending it out for a signature..”

Raya Durai

sales ops lead at a computer software company with 51-200 employees

[Read full review](#) 

“I use PandaDoc to create contracts and sometimes even send invoice estimates. Recently, I created an automation where I connected PandaDoc with Pipedrive, and once a deal is moved to a certain stage in Pipedrive, the contract is created and sent to the person..”

Muhammad Haseeb Saleem

Revenue Operations at a non-profit with 11-50 employees

[Read full review](#) 

“My main use case for PandaDoc is for creating a document for signing and acknowledgement.

A specific example of a document I have created and sent for signing or acknowledgement using PandaDoc is an NDA document that needed to be sent to a vendor for signature.

When I sent that NDA to the vendor, I found the process smooth, and the workflow stood out positively to me..”

Verified user

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Devops Engineer at a tech vendor with 51-200 employees

“My main use case for PandaDoc was preparing proposals. We had a lot of one-off projects, and we used PandaDoc to prepare the quotes for these projects. These could be very small projects and PandaDoc would just have one or two pages, or very big projects such as campaigns where we would break down things in even more detail and the document could have quite a few pages. The projects I worked on with PandaDoc were creative projects, so anything ranging from simple design requests such as designing a banner to videos, to full-blown tenders where we would have to present a quote in lots of detail. In general, I worked on lots of creative projects and campaigns. In the creative realm, the complexity and the type of service offered changed a lot, and so did our quotes, and PandaDoc was used for them..”

Ricardo Neves

[Read full review](#) 

Senior Project Manager at a consultancy with 51-200 employees

Setup

The setup process involves configuring and preparing the product or service for use, which may include tasks such as installation, account creation, initial configuration, and troubleshooting any issues that may arise. Below you can find real user quotes about the setup process.

My experience with pricing, setup cost, and licensing is that the price is more competitive compared to its alternative. The setup was straightforward and easy.

Patrick Dury

[Read full review](#) 

Junior Software Engineer at DXC Technology

“It is very easy to customize templates and documents in PandaDoc to fit our business needs. My experience with pricing, setup cost, and licensing is that it is a very cost-effective tool, affordable by any size of organization..”

George Peterson

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Data Analyst at a tech vendor with 10,001+ employees

“During initial deployment, we faced some issues that I was assigned to debug. There were signing order issues while we were creating documents from the template using Java SDKs. However, we resolved them easily and received help mostly from PandaDoc's documentation..”

Verified user

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Software Engineer at a consultancy with 11-50 employees

“The pricing for PandaDoc is good and very comfortable, and the setup cost is not very much. As soon as we create the contract, creating it on PandaDoc is very easy, so the setup cost does not really amount to anything. I have not used PandaDoc's licensing features yet..”

Muhammad Haseeb Saleem

[Read full review](#) 

Revenue Operations at a non-profit with 11-50 employees

“I have seen a return on investment with PandaDoc, and I can share that time has been saved.

My experience with pricing, setup cost, and licensing for PandaDoc is that it is good, the setup is easy, and we can use it with ease..”

Verified user

Devops Engineer at a tech vendor with 51-200 employees

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Customer Service and Support

“I don't remember reaching out to customer support at the time, or if I did, I think it was okay. Generally, they tried to solve the issue within 24 hours or at least flagged what was going on..”

Ricardo Neves

Senior Project Manager at a consultancy with 51-200 employees

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“Regarding customer support, I have had good experiences with PandaDoc's support team, as they have been very responsive and proactive. It is one of the best customer support teams I have reached out to..”

Bitanap Marion

Business Development Manager at Nestle

[Read full review](#) 

“The onboarding and training process for new users was very easy because of the support provided. The support team was readily available in case we had any issues.

“I would rate the customer support of PandaDoc an eight out of ten, as it is very great, proactive, and responsive..”

Gemam Mosik

Senior Software Engineer at Lee Hecht Harrison, LLC

[Read full review](#) 

Other Advice

“PandaDoc is one of the best tools available in the market, and I believe it is the best tool available in the market. I would rate this review as a 10 out of 10..”

Muhammad Haseeb Saleem

Revenue Operations at a non-profit with 11-50 employees

[Read full review](#) 

“All features are good, and I do not have much to add about them. My advice to others looking into using PandaDoc is that it is a great tool for a growing company. I would rate this product an 8 out of 10..”

Raya Durai

sales ops lead at a computer software company with 51-200 employees

[Read full review](#) 

“Regarding maintenance, we deployed the solution and handed it over to the customer approximately four to five months ago, and we have not encountered any issues. The client has requested some new features, and we are planning to integrate those. I would rate this product a 9 out of 10..”

Verified user

Software Engineer at a consultancy with 11-50 employees

[Read full review](#) 

“My advice to others looking into using PandaDoc is to embrace it, as it is very easy to use. I have been with my company since I started, and we were already using PandaDoc at that time. I do not know how it was working with another platform in my company, but my peers have mentioned that PandaDoc has been working more seamlessly since the company switched to it. They mentioned that it was more intuitive and easier to use than other platforms. I would rate this review a 9 out of 10..”

Verified user[Read full review](#) 

Jr Legal Ops Anlyst at a tech services company with 11-50 employees

“My advice for others looking into using PandaDoc is to keep things organized because there is a folder structure, and when several people are inside your company, trying to keep that folder structure organized can be very challenging. If one person doesn't do their job, things start to get disorganized. That said, the search feature in PandaDoc helps quite a lot, and it is able to search not only by the name of the proposal but also by items included inside that proposal, which was very helpful. I would recommend looking at the competition. My overall rating for this product is 7..”

Ricardo Neves[Read full review](#) 

Senior Project Manager at a consultancy with 51-200 employees

“PandaDoc is a very cost-effective tool, easy to use, and very secure. I would give it a nine out of 10 overall rating. I choose nine out of 10 because it is very user-friendly and the fastest possible option, plus the confirmation of which document has been viewed and completed by our clients is a great plus. It is very cost-effective, easy to use, and the support has always been proactive and affordable.

“PandaDoc is deployed in my organization in a hybrid model. The cloud provider we use with our hybrid deployment is [Amazon Web Services \(AWS\)](#). PandaDoc's performance and speed are very reliable and fast.

“The onboarding process for new users in my team is very easy as PandaDoc is easy to learn, especially through the integration with HubSpot. All types of technical users can use PandaDoc. PandaDoc's reporting and analytics are good as we can track sent documents to our clients and their status easily..”

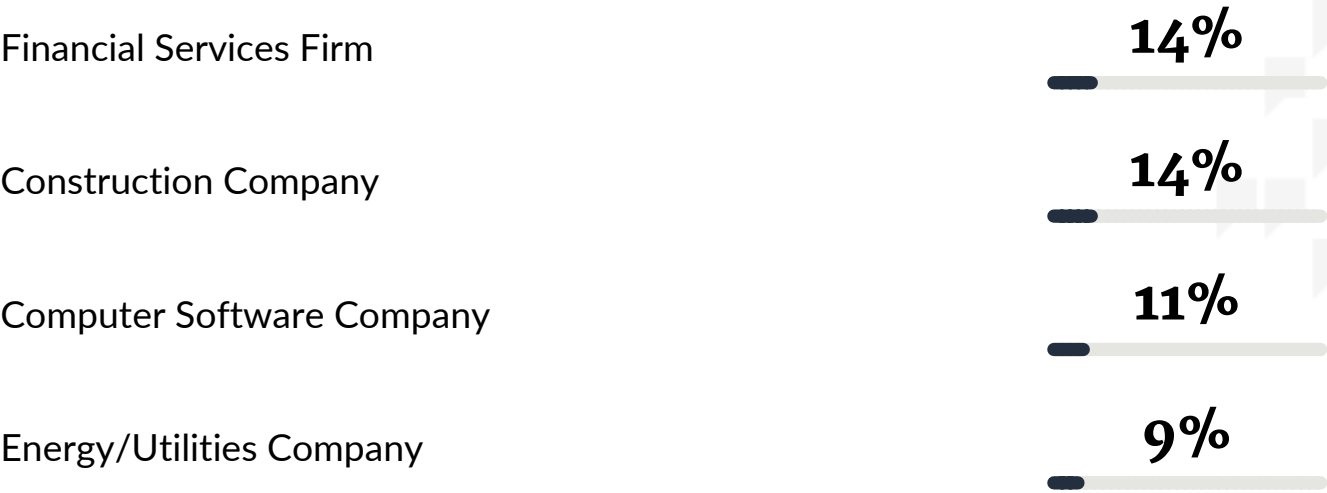
Christine Chelsea

Team Lead at Unilever

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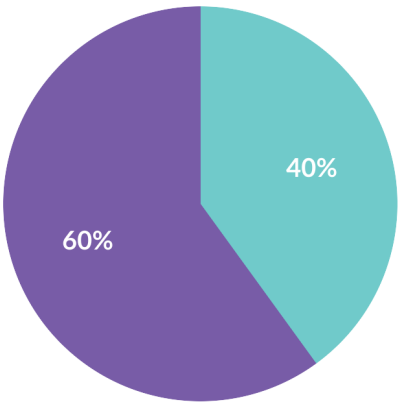
Top Industries

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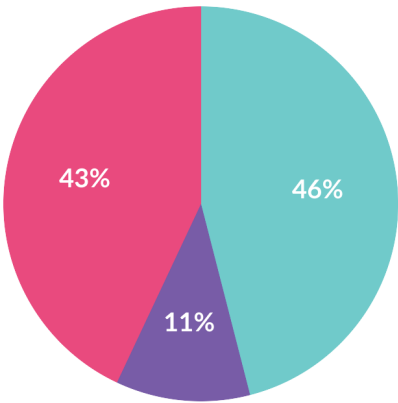


Company Size

by reviewers



by visitors reading reviews



Large Enterprise Midsize Enterprise Small Business

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