

SAVED \$5,500 AND REDUCED TOOL OVERLOAD FOR SMOOTHER SALES —

Transition to an In-Platform Tool: PandaDoc to HubSpot Quotes

The Challenge

The client, a growing commercial real estate company, faced three major pain points as their business expanded:

- Escalating costs due to needing a higher-tier PandaDoc subscription as the team expanded
- Frequent disruptions from unreliable Zapier connections between PandaDoc and HubSpot, slowing down sales and frustrating the team
- Complex and disjointed quoting workflows that required additional training and increased the risk of errors

The Solution

To reduce the client's costs and simplify their tech stack, we transitioned them from PandaDoc to HubSpot Quotes, a tool they already had access to. We designed custom quote templates to replicate the look and feel of PandaDoc, so the transition was seamless for both their team and clients. By embedding automation within HubSpot, we eliminated the need for Zapier and external tools, allowing the sales team to create and send quotes in just a few clicks—no extra software or training required.

The Impact

The client can now:

- Save \$5,500 annually by eliminating the need for a PandaDoc subscription
- Reduce tool management and training overhead by consolidating sales activities into a single platform
- Achieve smoother quote generation and automation without external connections, minimizing errors and downtime
- Automate the deal-closing process when a quote is signed, improving efficiency

The Details

Industry:
Commercial Real Estate - Office Space

Business Area:
Sales, Operations

Tools Used:

- HubSpot Quotes
- Custom Quote Templates
- Sequences
- Workflows

