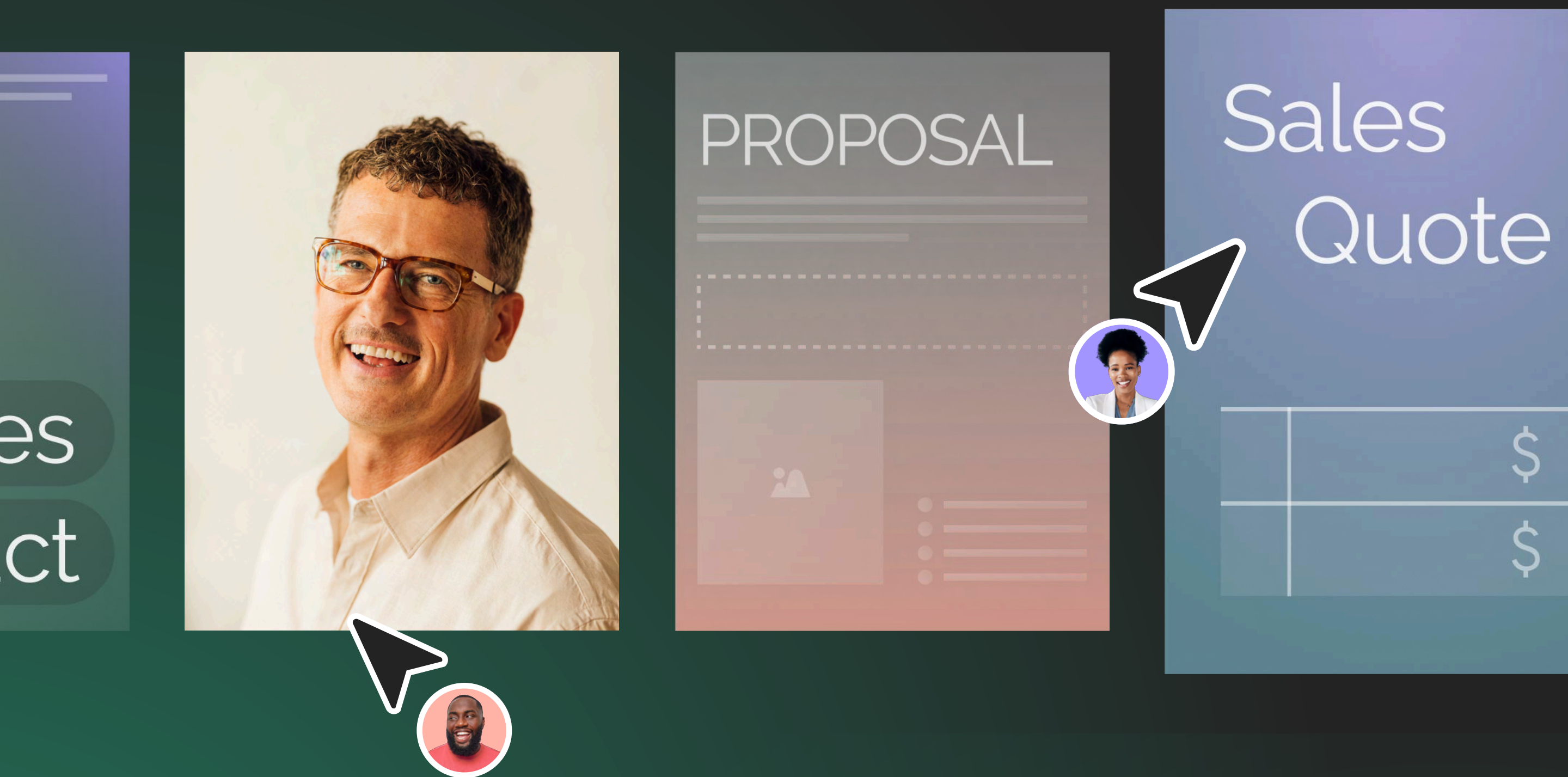
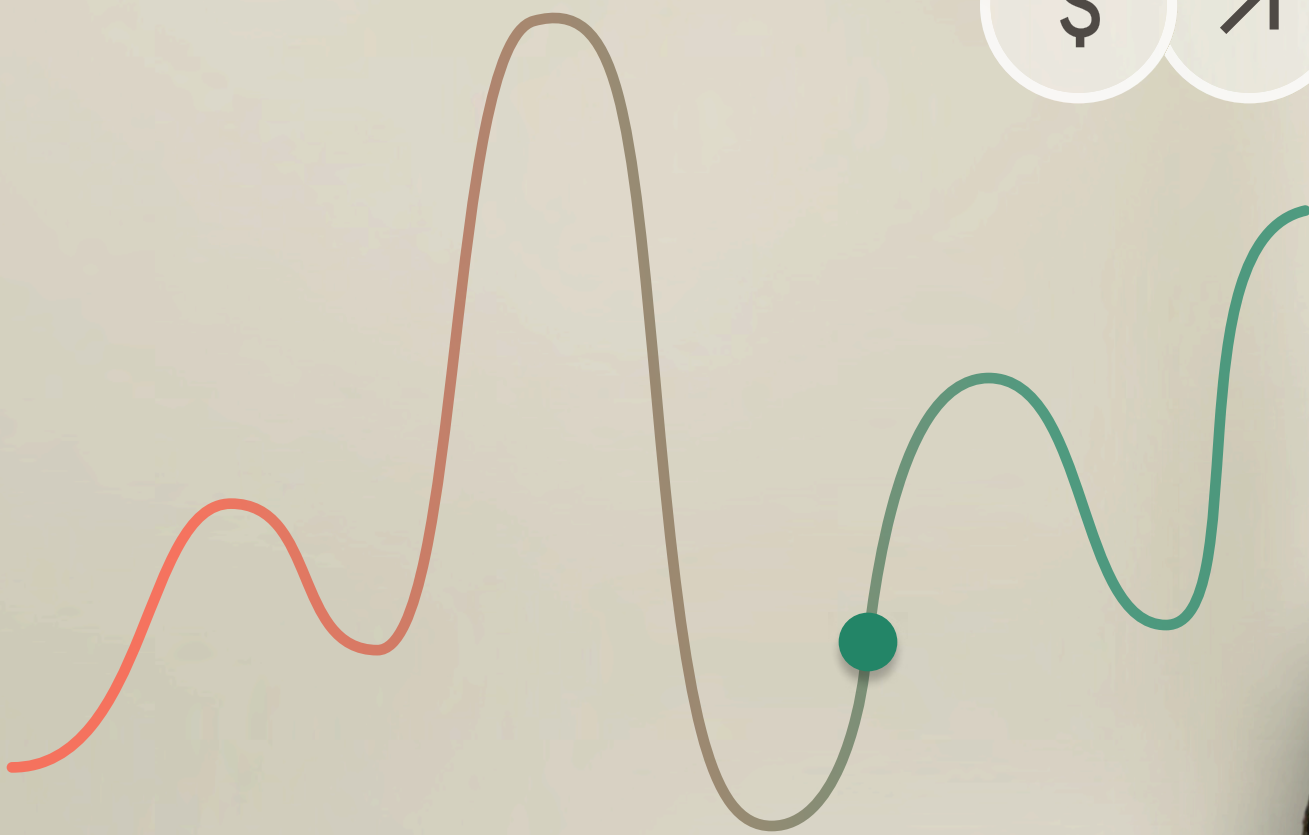


HOW TO SCALE SMARTER AND SHORTEN QUOTING TIME BY 80%



THE REVOPS PLAYBOOK

QoQ growth



The current state of RevOps

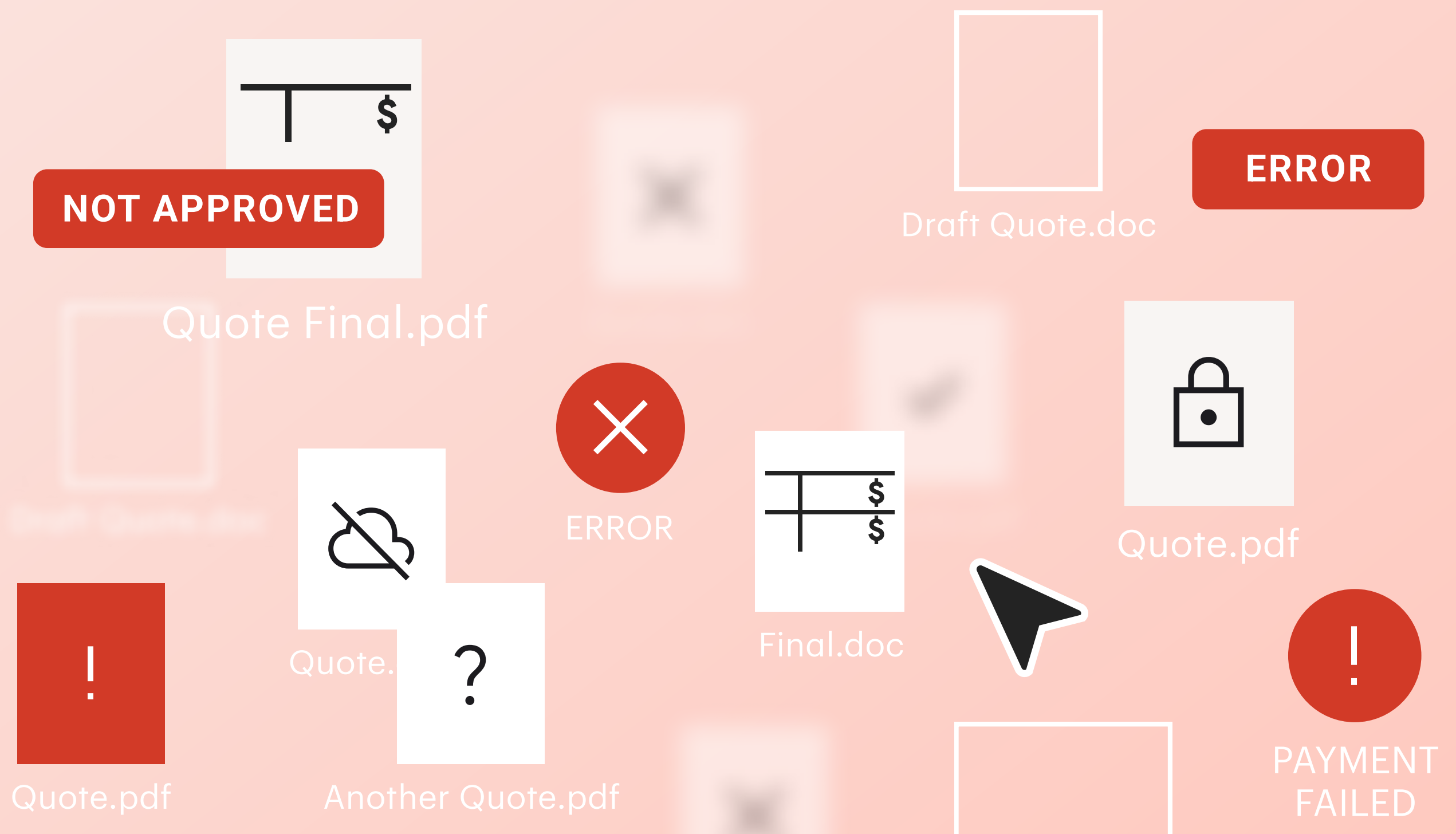
Revenue leaders today aren't just chasing growth — they're expected to engineer it. With leaner teams, tighter budgets, and increasingly complex sales motions, the pressure is on to scale without slowing down or breaking process.

The goal? Build systems that empower reps to move fast, give Finance confidence in every number, and keep the customer experience airtight, all without adding headcount.

But for many teams, quoting becomes a roadblock that flies under the radar. It seems simple on the surface: send a proposal, close the deal.

In reality, quoting is often where things break...

- Reps go off-script or over-discount.
- Approvals turn into bottlenecks.
- Contracts don't match details from the demo.
- And worse, customers sign agreements they don't fully understand.



One company's struggle... and success



EMERSON MCCUIN

Head of Revenue
Operations at HAAS Alert
in Chicago, IL

This was the RevOps scenario Emerson McCuin inherited when he stepped in as Head of Revenue Operations at HAAS Alert in Chicago, IL. Quotes were being created manually, with no checks or automation. Finance had to review every document before invoicing. And reps were bogged down chasing formatting and line-item accuracy instead of selling.

Quoting wasn't just a bottleneck, it was a liability.

SO EMERSON REBUILT IT.



He created a guided,
automated process powered
by PandaDoc and HubSpot, one
that reduced manual effort by



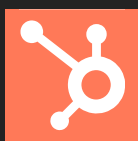
Eliminated the need for Finance to manually review every quote or chase down details, and gave reps autonomy with guardrails. What follows here is the playbook for how he did it, and how your team can do the same.



The HAAS Alert tech stack

First, let's take a look at the key pieces of software Emerson and his team used to iron out their quoting process.

It starts with two essential business solutions:



HubSpot

their CRM, the source of truth for every deal



PandaDoc

for document automation, approvals, and analytics

Additionally, there are two specific options HAAS Alert adopted to connect these two platforms and set themselves up for the configure, price, quote (CPQ) process.



PandaDoc + HubSpot integration

native sync,
no middleware



PandaDoc CPQ add-on

guided selling, conditional
logic, and product catalog

What this does

Simply put, this tech stack allows reps to use PandaDoc's suite of document management tools inside the HubSpot environment. That means fewer open tabs to manage — but the native integration between the two platforms also autofills your quotes with buyer and deal info while a two-way sync attaches any resulting quote to your customers' HubSpot profile.



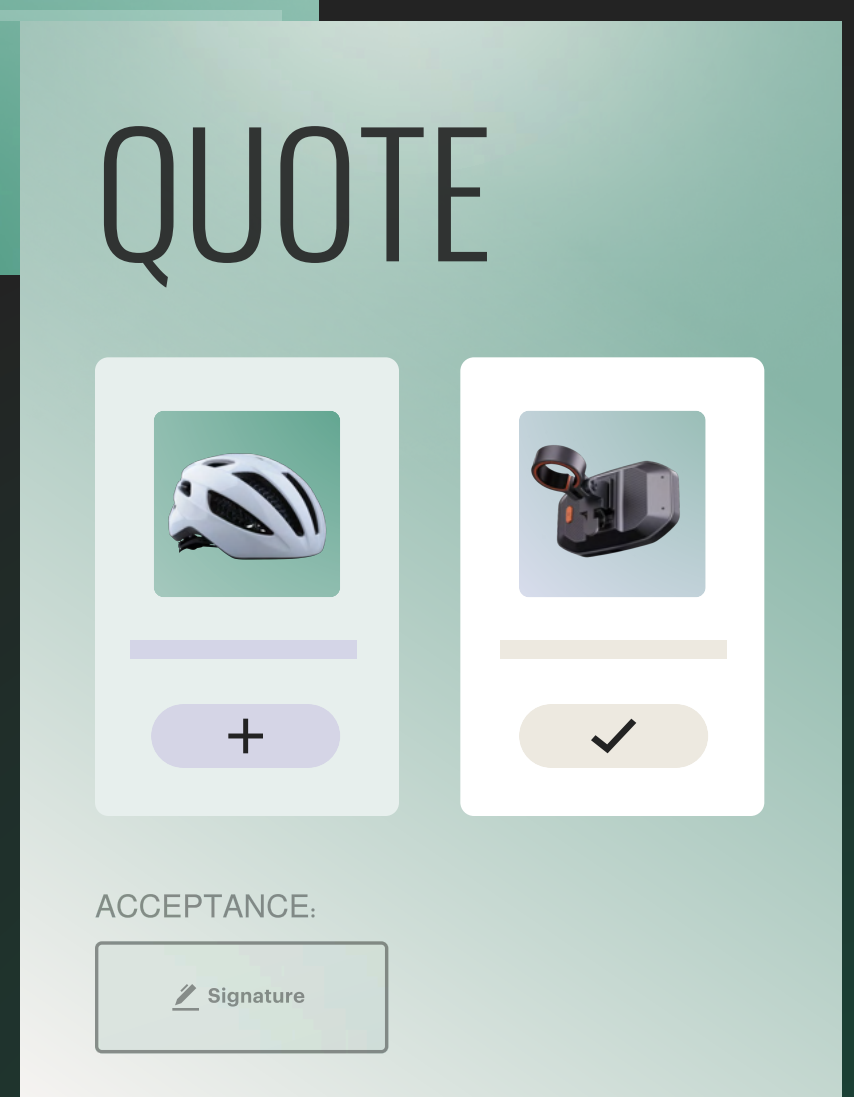
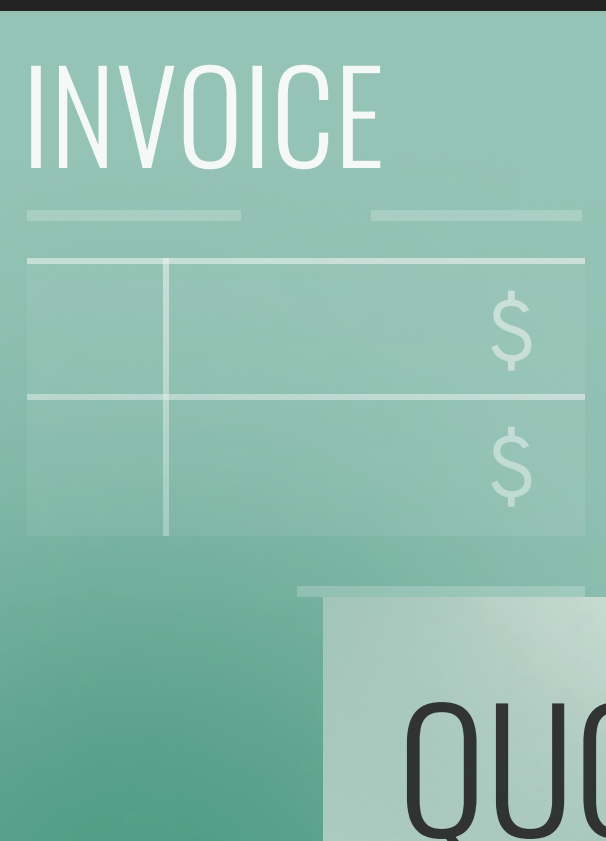
Faster, more accurate quotes.



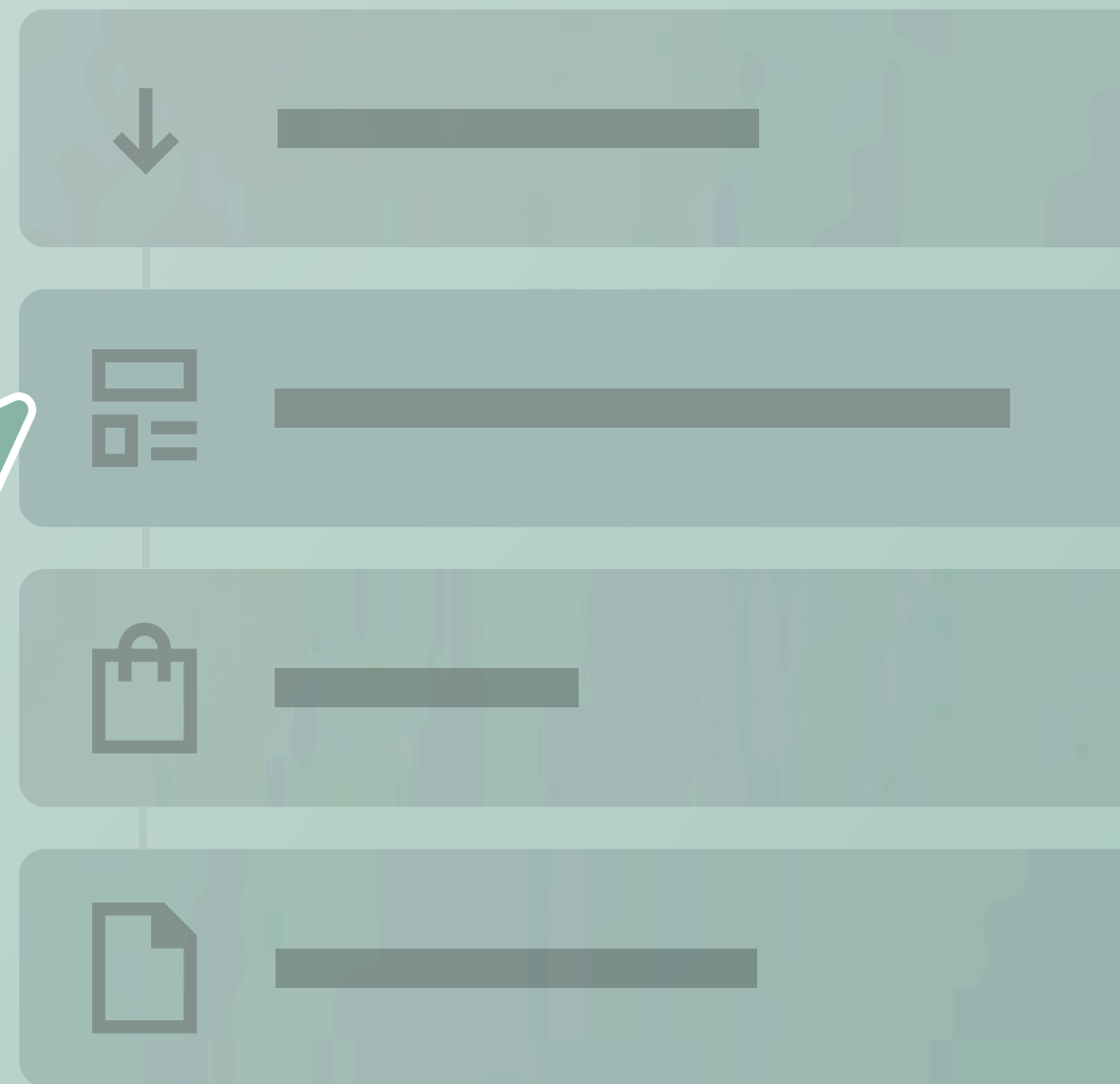
Better focus on delivering an easy buying experience.



Automatic purchase histories.



Let's get it set up.



PHASE ONE

SET UP GUIDED SELLING IN PANDADOC

→ Create your workflow




Once your tech stack is ready, it's time to set up guided selling in PandaDoc. Typically this takes 60 to 90 minutes. Once completed, it can help save your Revenue team hours every week.

Create your workflow

STEP 1

In PandaDoc, go to **Workflows** and click **Create Workflow**. Start from a blank workflow so you can tailor each step to your quoting process.

 New Workflow

Run workflow Publish

01 ↓ Pull data from integration

02 📄 Collect form data

+ Add step

+ Add step

🔗

Create or update quote

📄 Generate document

🔗 Python code



Set your trigger

STEP 2

This is what kicks off the workflow. To replicate HAAS Alert's setup, use an **API Call** from HubSpot as your trigger. This allows reps to start the quote-building experience directly from a deal record in HubSpot.

```
// HubSpot Deal → API Call → Start Quote
app.post("/start-quote", async (req, res) => {

    const deal = await
    getDealFromHubSpot(req.body.dealId); //
    Fetch deal data
    await startQuote(deal); // Trigger
    quote-building workflow
    res.json({ message: "Quote process
    started" });
});
```

Build the guided form

STEP 3

This is where the rep experience comes to life. Use PandaDoc's form builder to create a clean, intuitive structure for product and service selection. This can include:



Add dropdowns for core offerings (e.g., Product 1, Product 2, Services).



Use quantity fields for each line item



Add yes/no toggles for optional services like installation.



Add conditional logic

STEP 4

Next, make your workflow smarter by tailoring what reps see based on their selections. An example of this can look like:

- If “Product 1” is selected, show options for **Hardware Add-on** and **Activation Fee**.
- If “Product 2” is selected, skip those add-ons.

This keeps quotes consistent and ensures reps don’t forget critical components — a key win for Emerson’s team at HAAS Alert.



Standard Selling Demonstration



PULL DATA FROM INTEGRA...



COLLECT FROM DATA



CREATE A QUOTE



GENERATE A DOCUMENT



COMPLETE

Sales process

Core Services

☒ Product 1

☐ Product 2

Hardware/Activation Fee

☐ Hardware 1

☐ Add-on 1



Connect to your product catalog

(optional)

STEP 5

If you're using PandaDoc's product catalog, tie your form fields to it. This pulls in up-to-date pricing and SKU-level detail to new quotes automatically.

Design your quote template

STEP 6

Create a PandaDoc template that will receive the data from your form and the HubSpot deal. To map the fields, use variables like:

- `[[form.product_1]]`
- `[[deal.amount]]`
- `[[form.quantity_product_1]]`

For more on using variables in PandaDoc, see [this article](#). We also have a course in our [Learning Academy](#) for better using variables.

Map form and deal data to your template

STEP 7

Use the **Map Data** tool to connect everything. This ensures that what your reps select in the form shows up exactly where it should in the quote.



Add document creation and approvals

STEP 8

Insert a **Document Creation** step to automatically generate the quote.

Optional: Add approval logic if certain thresholds are met — like discount percentages or deal size. This will flag certain kinds of deals for approval and keep oversight intact without slowing things down.

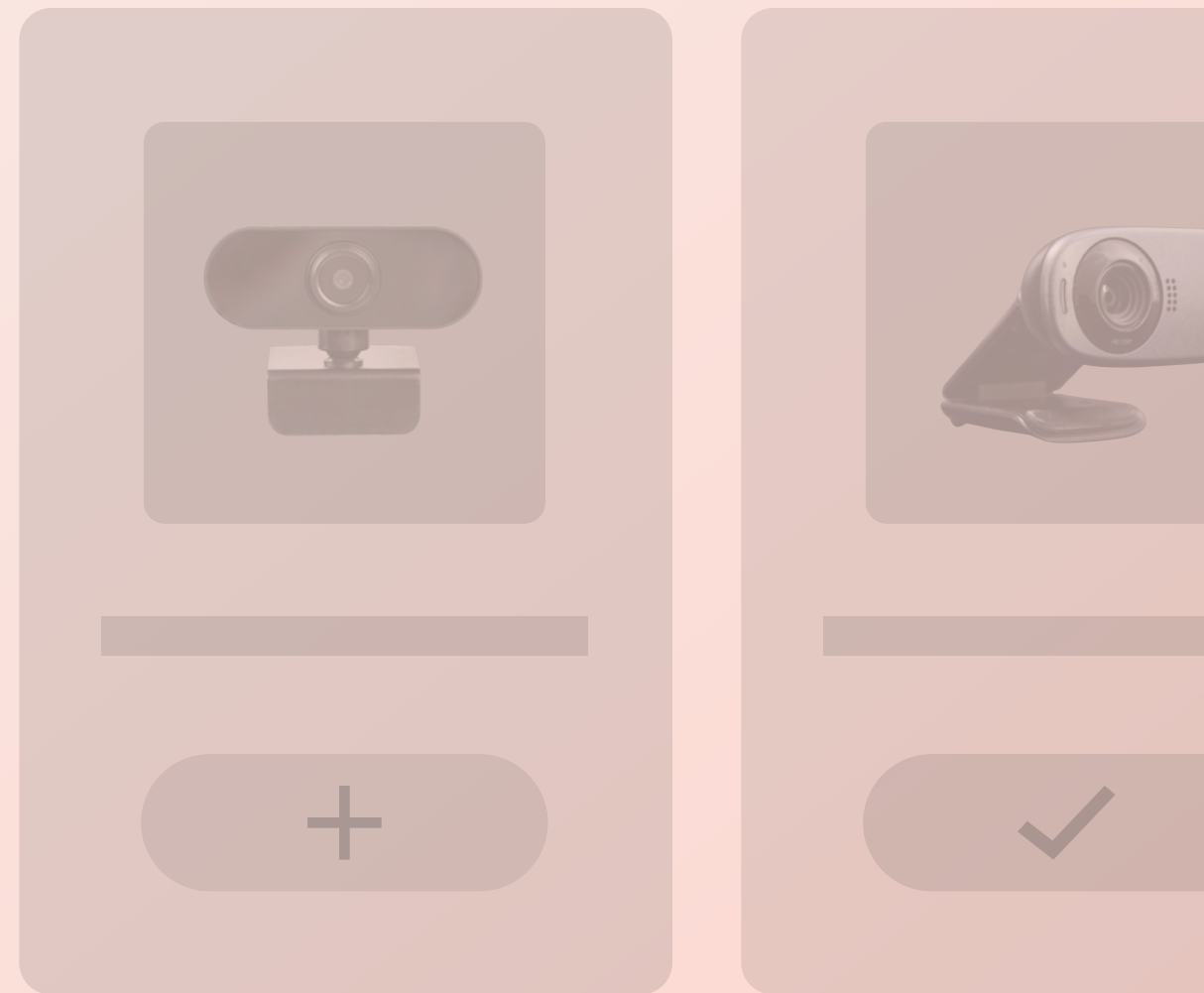
Set up approval workflow

IF	Document value ▼	IS	Over ▼	50000 USD ▼
OR	Any line item discount ▼	IS	Over ▼	20 ▼ % ▼

Publish your workflow

STEP 9

And finally — once you've tested your workflow — publish it to make it available in HubSpot. You can always revisit it later to make updates or improvements.



 PHASE TWO

QUOTING FROM HUBSPOT, START TO FINISH

→ **Generate a document**



Now that your guided selling is tested and ready for your reps to use, let's walk through the quote creation process. With everything in place, generating even complex quotes should only take around three to five minutes.

Open a deal in HubSpot

STEP 1

Reps work directly in the deal record in HubSpot. The PandaDoc workflow card lives inside the HubSpot environment, so there's no switching tabs or tools.

Start the workflow

STEP 2

Click Start Workflow on the PandaDoc card. Reps choose the quote type that fits the deal.

PandaDoc workflows

Activities

Deal Checklist

Manager Review

PandaDoc workflows

Standard Selling Documentation



Confirm deal data

STEP 3

Key fields, like company name, deal amount, and contact info, are pulled in automatically. Reps can also switch to a different associated deal if needed.

Complete the guided form

STEP 4

Reps select products and services via a clean, intuitive form. Remember:

- 1 Conditional logic ensures only relevant options show.
- 2 Yes/no toggles add services like implementation as needed.
- 3 Quantity fields ensure pricing accuracy.


This guided process reduces errors and keeps every quote within approved parameters.



Review, preview, and customize

STEP 5

Reps can reorder items, preview the full quote directly in HubSpot, and apply discounts if permitted.



Standard Selling Demonstration

✓

PULL DATA FROM INTEGRA...

✓

COLLECT FROM DATA

✓

CREATE A QUOTE

GENERATE A DOCUMENT

COMPLETE

Products & Services

	Price ▾
▾ Product 1	\$299.00
▾ Hardware 1	\$199.00
▾ Installation Services	\$1,499.50
<div><div>+ Product</div><div>+ From catalog</div></div>	
Grand total	\$4,479.50

Back



Route for internal approvals

(if required)

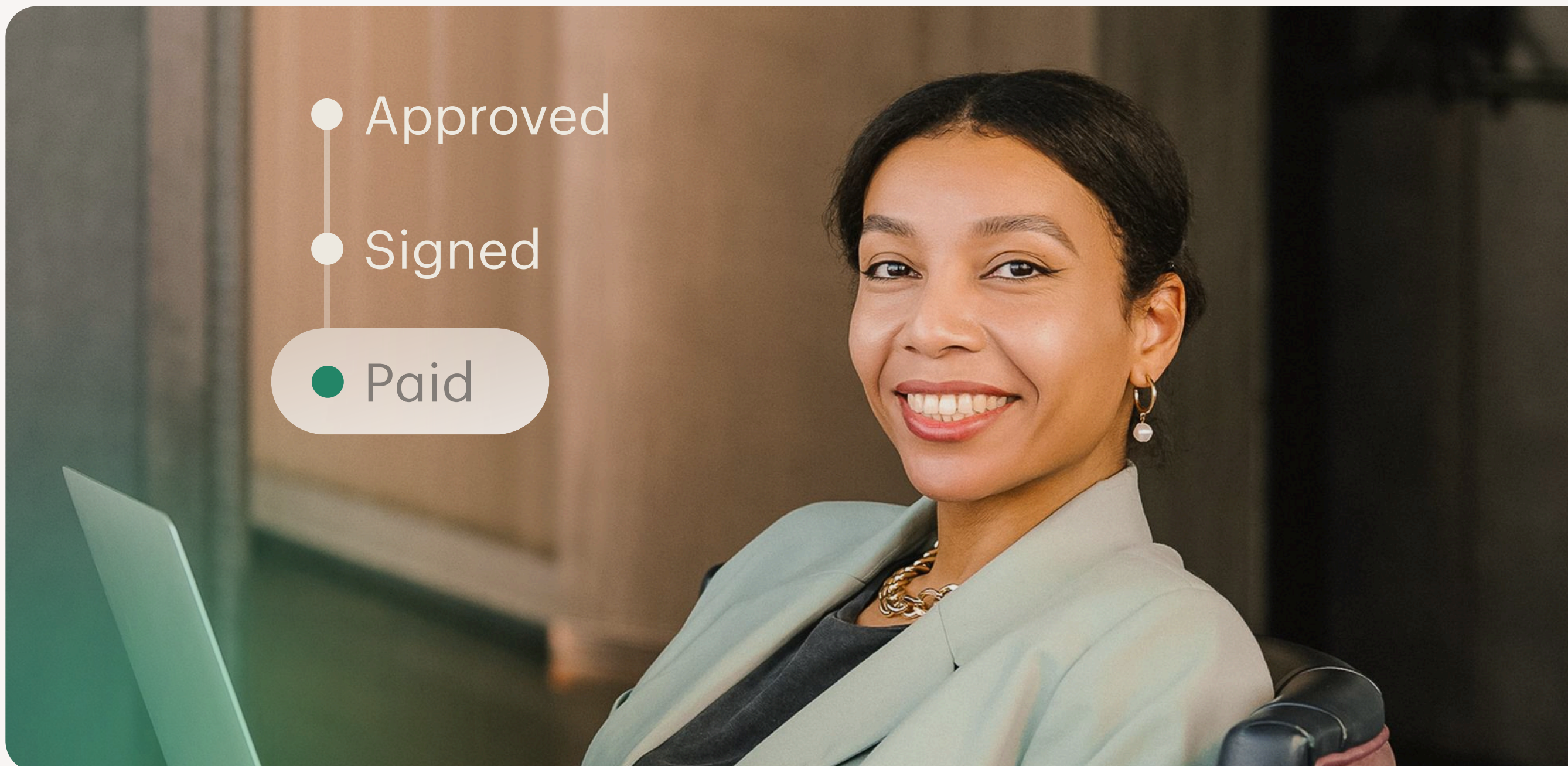
STEP 6

If a quote meets a predefined threshold (like a large discount), PandaDoc automatically routes it to the correct approver.

Send and sync

STEP 7

Once approved, reps send the document via email or link. Line items and deal data sync back to the HubSpot record automatically.





THE IMPACT

Bigger, measurable results with PandaDoc

HAAS Alert overhauled their quote creation process from a multi-step time sink into a scalable, intuitive system that continues to impact their bottom line.

80%

reduction in
quoting time

120

hours saved
every month

66.7%

faster document
creation



With results like these, even smaller Revenue teams can start to scale their quoting process without adding headcount. And for businesses like HAAS Alert, that's game changing.

“

PandaDoc CPQ
helped us unlock
speed without
sacrificing control,
which is everything for
a small RevOps team.



EMERSON
MCCUIN

Head of Revenue
Operations, HAAS Alert

Want to build this yourself?

PandaDoc CPQ gives you the tools to replicate HAAS Alert's setup:



NO CODE



FULLY NATIVE



BUILT TO SCALE

See how PandaDoc can transform the way
your Revenue team produces quotes and
closes deals.

[BOOK A DEMO](#) →



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