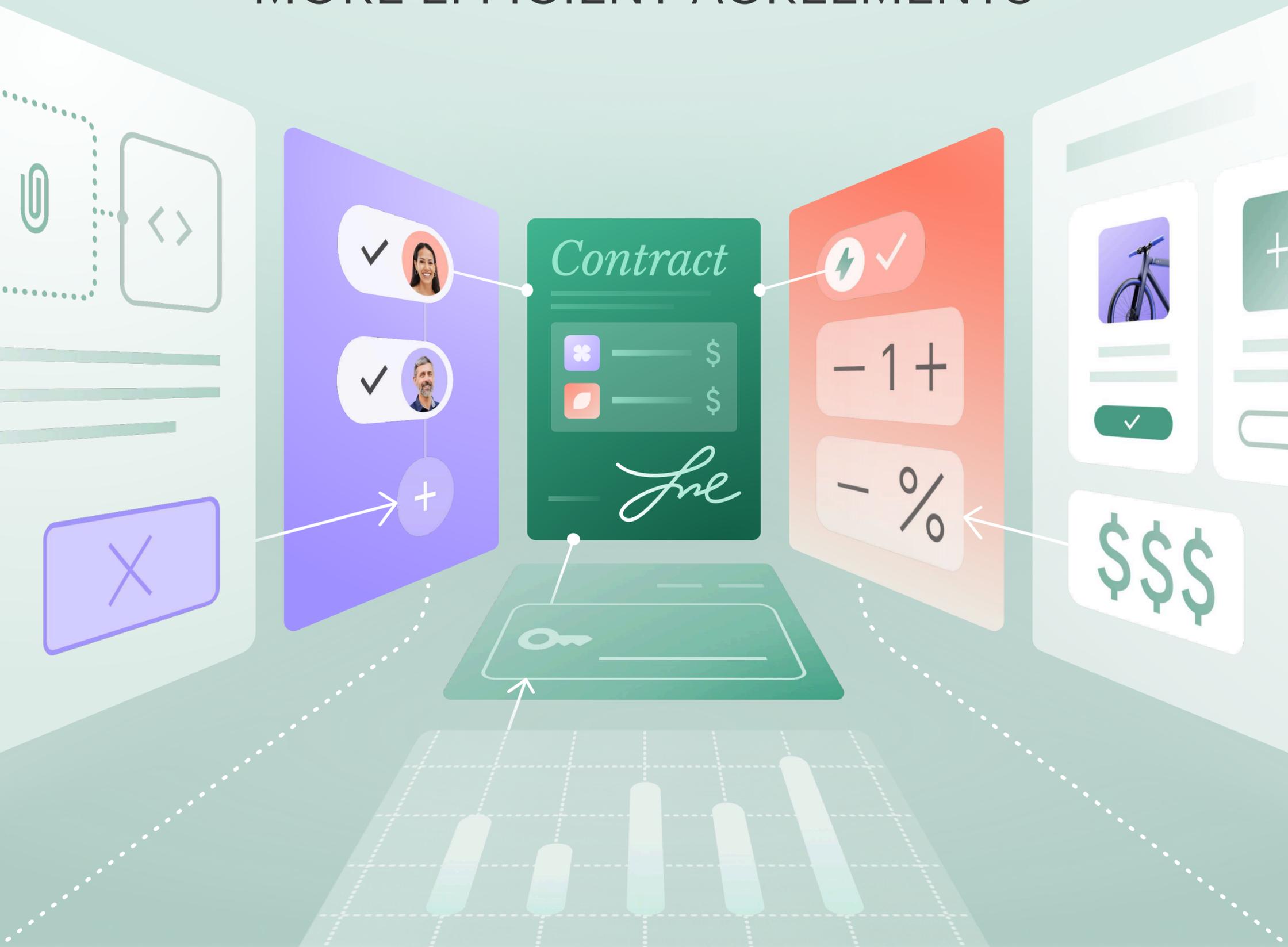


THE DEAL VELOCITY PLAYBOOK

FOUR PLAYS FOR FASTER,
MORE EFFICIENT AGREEMENTS





Introduction

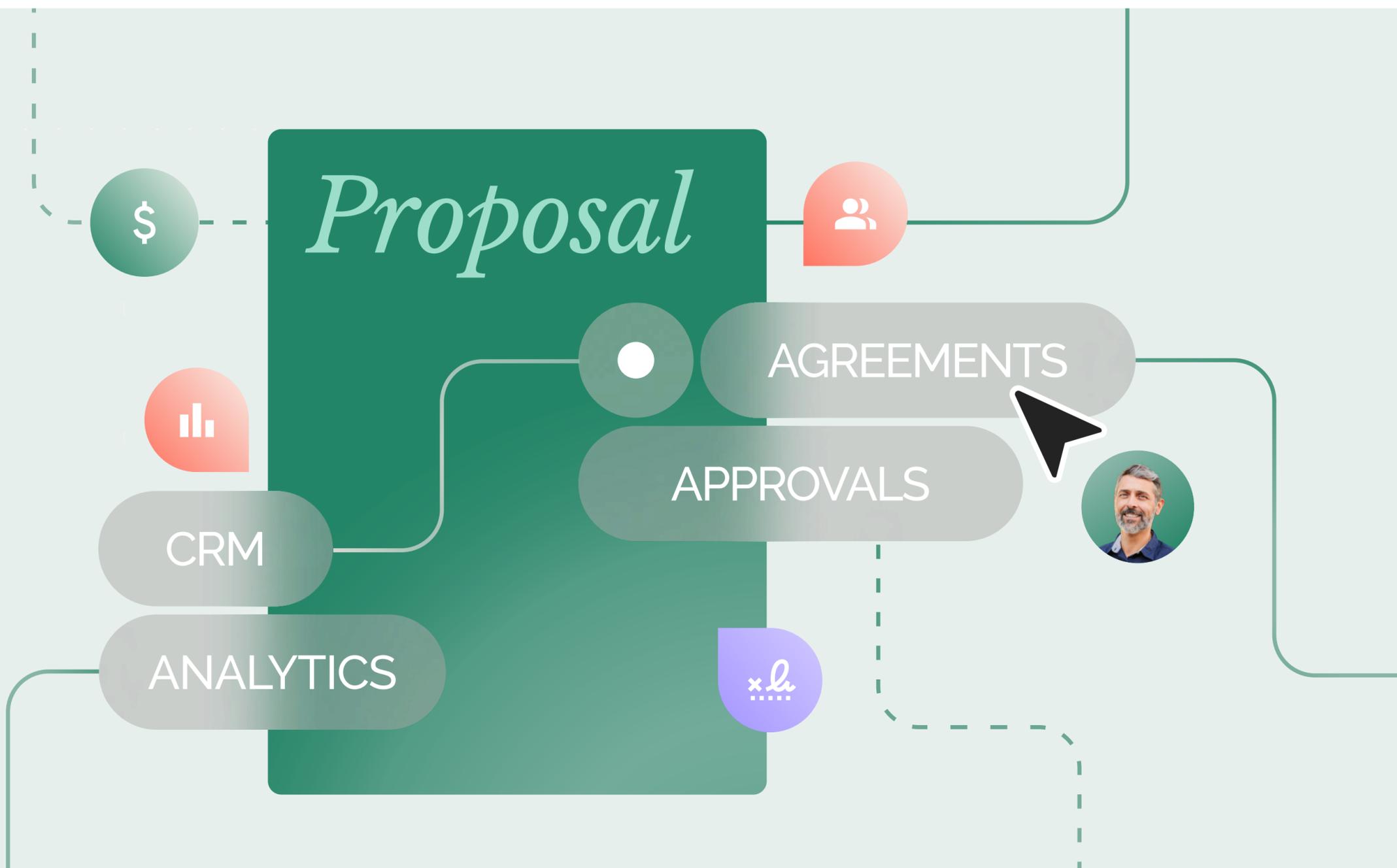
There's a version of this story that plays out at many growing companies.

Sales closes its first hundred deals. Agreements feel manageable. Someone builds a decent template, pricing lives in a spreadsheet, and approvals happen in chat or email. For a while, it mostly works.

Then the team grows. Deals get more complex. There are more products, more bundles, more pricing tiers, and more exceptions. New customer segments bring new requirements. Procurement and legal show up more often.

As that complexity builds, the work around every agreement starts to multiply. Deal velocity slows. Deadlines get easier to miss. Deals stall in review. Customers feel the drag, too.

That's exactly why we created this playbook. Inside, you'll find four practical plays pulled from real business leaders who've already worked through these bottlenecks. Each one shows what a better agreement workflow looks like, the PandaDoc features that make it possible, and the simple workflows teams can use to make the process lighter, faster, and easier to manage.



Contributors

This playbook draws on conversations with three professionals who saw their own deal cycles grow more complicated as their companies grew:



KENDALL ALMAGUER

COO of Cavalry Real Estate
Advisors



BILL BARLAS

CEO of Quick2Bid



SINDHU SRIVASTAVA

CEO of We Crush Events



Even though each team is different, the same pattern consistently showed up: Agreements didn't fall apart all at once, they got harder one exception at a time.

Why agreements get harder

Agreement workflows usually don't break overnight.

They break one exception at a time. Over time, teams end up rebuilding documents, rechecking pricing, chasing approvals, and hunting for status updates.

Four common pressure points:



Creation slows down

Reps improvise, and the "standard" agreement stops being standard.



Pricing gets messy

Numbers live in too many places, so quoting stalls.



Status becomes scattered

"Where does this deal stand?" turns into a search.



Approvals drag

Ownership is unclear, so deals wait.

Why the right system matters

These pressure points show up in growing teams because agreement work is usually spread across too many tools.

Every deal requires someone to stitch those pieces together.

PandaDoc brings those steps into one agreement workflow. Documents, pricing, approvals, collaboration, and visibility all live in the same system, so teams can create agreements faster, review them in context, and track progress without chasing updates across tools.

The plays ahead show what that looks like in practice. Each one highlights a common pressure point, and the PandaDoc features that make the workflow easier to run and easier to scale.

Let's start where most teams feel it first: Creation gets slower, versions drift, and your default agreement stops being consistent.

BUILD THE FOUNDATION ONCE, USE IT EVERY TIME

FEATURED CUSTOMER:



KENDALL ALMAGUER

Chief Operating Officer
Cavalry Real Estate Advisors

Based in Falls Church, Virginia, Cavalry Real Estate Advisors provides commercial real estate tax and advisory services to property owners and investors across the U.S. As their agreements process scaled, keeping the language consistent across contracts became harder.

Changes made to one version didn't always carry across the others, and it became easy for outdated language to slip into a new agreement.

When Kendall realized their agreement process needed to be more adaptable to revisions and updates, she knew the company needed to make a change.

“Before PandaDoc, our agreement process ran on Microsoft Word templates, and changes didn’t reliably carry across versions. PandaDoc’s Smart Content gave us one source of truth. I update it once, and every template using that content stays automatically current.”

—Kendall Almaguer

PandaDoc changes the workflow. Instead of maintaining static templates across multiple files, teams can manage shared language in one place and ensure every agreement pulls from the current version.



Use this when:

- Multiple “standard” templates are floating around.
- Reps copy old documents to move fast.
- Legal, pricing, or terms updates do not show up everywhere.



In PandaDoc, building templates is easy

-  **Create a core template:** Build one approved starting point so reps stop copying old documents.
-  **Convert shared clauses into Smart Content:** Store terms and legal language once so updates don't drift across versions.
-  **Build a content library:** Save approved sections (scope, standard clauses, add-ons) so reps reuse instead of rewriting.
-  **Add variables for repeat fields:** Auto-fill company name, dates, totals, and signer details from the CRM or one-time entry.
-  **Lock critical sections:** Protect pricing and legal sections to prevent accidental edits.

SALES PROPOSAL

+ Add rule   

Create a conditional rule ×

Condition 1

IF

Healthcare

THEN

Case Study Healthcare × +

+ Add another condition

Add fillable fields



Noah Walker

noah.walker@sealdocs... ▾



Signature ⋮



Initials ⋮



Date ⋮



Text field ⋮

▾ Show all

QUOTE FROM ONE SOURCE OF TRUTH

FEATURED CUSTOMER:



BILL BARLAS

CEO & Co-Founder
Quick2Bid

Quick2Bid was built around one idea: Complex product selling doesn't have to be complicated. The Milwaukee-based consultancy helps manufacturers and service companies implement CPQ, CRM, and ERP solutions that bring order to messy sales processes.

But Bill had seen firsthand what happens when pricing lives in too many places — wrong price books, outdated documents, and the kind of margin leakage that only shows up after the deal is done.

“We’ve seen deals priced off the wrong price book or even the wrong year, and that can lead to tough customer conversations or real margin leakage.”

—Bill Barlas

That kind of risk is usually a sign that pricing needs more structure. PandaDoc gives teams one place to maintain products and pricing, so proposals are built from current information instead of scattered references.

“PandaDoc helps solve that by giving you price books, product information, and a more structured way to build proposals with the right pricing in place.”

—**Bill Barlas**



Use this when:

- Pricing is inconsistent.
- Quotes require multiple rounds of confirmation.
- Pricing errors or last-minute changes keep showing up.



In PandaDoc, pricing stays consistent

-  **Create a product catalog:** Add approved products and services so reps select items instead of typing line items.
-  **Set your price book:** Store current pricing in one maintained list so quotes don't pull from old spreadsheets or last year's documents.
-  **Build a pricing table template:** Standardize how items, totals, and pricing notes appear in every quote.
-  **Pre-build packages:** Save your common bundles so reps assemble quotes fast and consistently.
-  **Control who can edit pricing:** Limit price overrides to the right roles so numbers don't drift.

Catalog



Title ▾

SKU

Price ▾



Lounge Armchair

items

PP231466

\$650.00



Wooden Chair

items

PP172287

\$550.00



Modern Chair

items

AC517939

\$700.00

COLLABORATE WHERE THE AGREEMENT LIVES

FEATURED CUSTOMER:



KENDALL ALMAGUER

Chief Operating Officer
Cavalry Real Estate Advisors

Cavalry Real Estate doesn't sell a fixed product. Every engagement is scoped differently, which means agreements need to flex — and someone always needs to weigh in before they go out. For Kendall, the bottleneck wasn't the contract itself. It was everything around it.

PandaDoc brings that necessary collaboration into the agreement itself. Instead of sending versions back and forth, the team can review, comment, and update the same document together.

“I took a step back and looked at the process holistically and what the ideal workflow should look like. I wanted one place, one source of truth, and the ability to collaborate faster than we could with Word and email.

With PandaDoc, I could send the document and collaborate directly so the right person could quickly make changes. What used to take a couple days dropped to about five minutes, and then it was out the door.”

—**Kendall Almaguer**

When edits move through email threads and separate document versions, the team spends more time confirming context and tracking changes than actually making the update.

Bringing collaboration into the agreement removes the coordination that slows revisions down. The right people can review and update the document immediately, and the agreement moves forward.



Use this when:

- Changes to agreements require back-and-forth over email.
- Multiple people need to review or edit before a document goes out.
- Turnaround on revisions takes days when it should take minutes.
- There's no clear place to track what changed or who approved it.



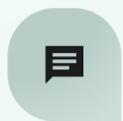
In PandaDoc, everyone works from the same document



Collaborate with your team: Create the document once, then share it internally so review happens in the document — not across email threads.



Assign roles and permissions: Decide who can edit vs. who should review and approve so changes come from the right people at the right time.



Pin comments where they belong: Keep questions, decisions, and revision notes attached to the exact section they refer to.



Track activity automatically: See what changed and what still needs action without asking for a status update.



Lock approved sections: Once language is finalized, lock it so it can't be accidentally modified during later edits.



Send when it's ready: Move the same document from internal review to client signature without exporting, copying, or rebuilding anything.

The Developer represents and warrants to the following:

- Development and delivery of the Software Agreement are not in violation of any other law that the Developer has with another party.
- The Software will not violate the intellectual property rights of any other party.**

- For a period of 10 days after the Delivery Date, the Software shall operate according to the terms of the Software Agreement.

- Information about confidentiality and intellectual property.**



Noah Walker

Today at 4:38 PM



Delete: "The Software will not violate the intellectual property rights of any other party."



Add your reply here...



Harper Young

Today at 4:38 PM



STOP ASKING, START KNOWING

FEATURED CUSTOMER:



SINDHU SRIVASTAVA

CEO
We Crush Events

Based in Los Angeles, CA, We Crush Events runs corporate events nationwide — conferences, incentive trips, galas — with a team small enough that every contract in flight has to be accounted for.

As more agreements moved through the business, tracking status became harder, and even simple questions required manual follow-ups. That's where a more centralized agreement workflow becomes important. When document activity, reminders, and status all live in one place, the team can see what's moving without chasing updates across people and tools.

“Before PandaDoc, we lived in Google Docs. We were chasing contracts and trying to figure out who manually created what and where. With PandaDoc, I now have visibility into everything. It’s one template, and I can see documents in almost real time as the team updates them, so I don’t have to go chasing ten people to know where things stand.”

—Sindhu Srivastava



Use this when:

- Deal status lives across tools and people.
- Follow-ups depend on memory and manual nudges.
- You want contracts to move cleanly from signature to payment.



In PandaDoc, every agreement's status is always within reach



Connect your CRM: Keep the document and the deal record tied together.



Define status stages: Map out your workflow with dedicated phases for drafting, viewing, signing, and so on.



Turn on activity tracking: See when documents are sent, viewed, and completed.



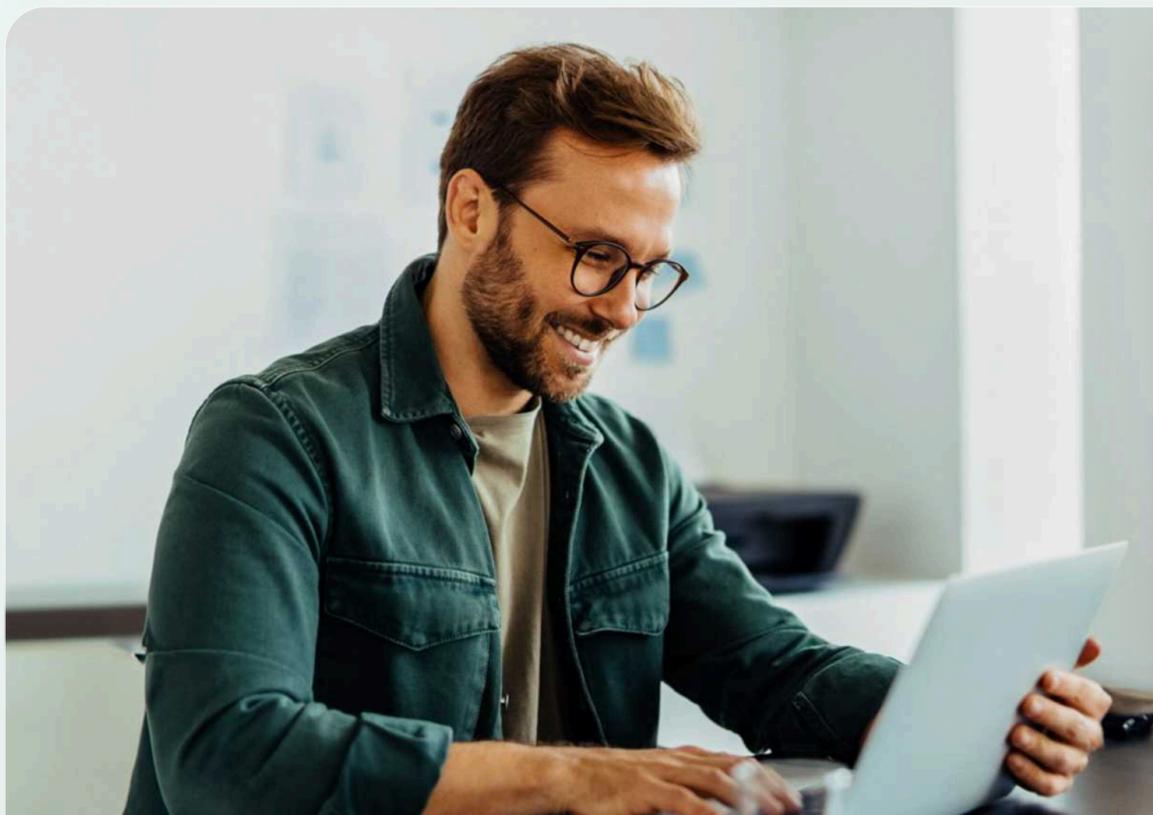
Set automated reminders: Follow up when a document hasn't moved, without manual chasing.



Standardize the starting point: Use templates so every document follows the same flow and is easier to track.



Add a payment step: Connect Stripe (or your payment provider), then add a payment block/link to the template so customers can sign and pay in one flow. You'll need the payment integration enabled, a set payment rule (deposit vs. full amount), and mapped fields for amount and payer details.



Analytics



Jack Smith Signed

jack.smith@acmecorp.com

ACTIVITY

Viewed	1 time
Total time spent	10 min
Last viewed	4 hours ago

SEE ALL 4 PLAYS IN ACTION

Your agreement workflow shouldn't be the thing standing between your team and revenue.

PandaDoc gives you one place to create, price, approve, and track every agreement, so the process grows with your business instead of holding it back. The features in this playbook work together as a connected system that reduces manual work, keeps deals moving, and gives everyone the visibility to act at the right moment.





That's why 68000+ customers love PandaDoc

TATA STEEL

AUTODESK

Sysco

Rakuten

U-HAUL

BOSCH



LEAD FORENSICS

SGS

Sylvan Learning



bonusly

tomtom



Check out the **G2 Proposal Report** to see why growing businesses choose PandaDoc.

[DOWNLOAD NOW →](#)

Schedule a free, no-pressure demo to see how it all comes together.

[BOOK A DEMO →](#)



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