PandaDoc®

HubSpot

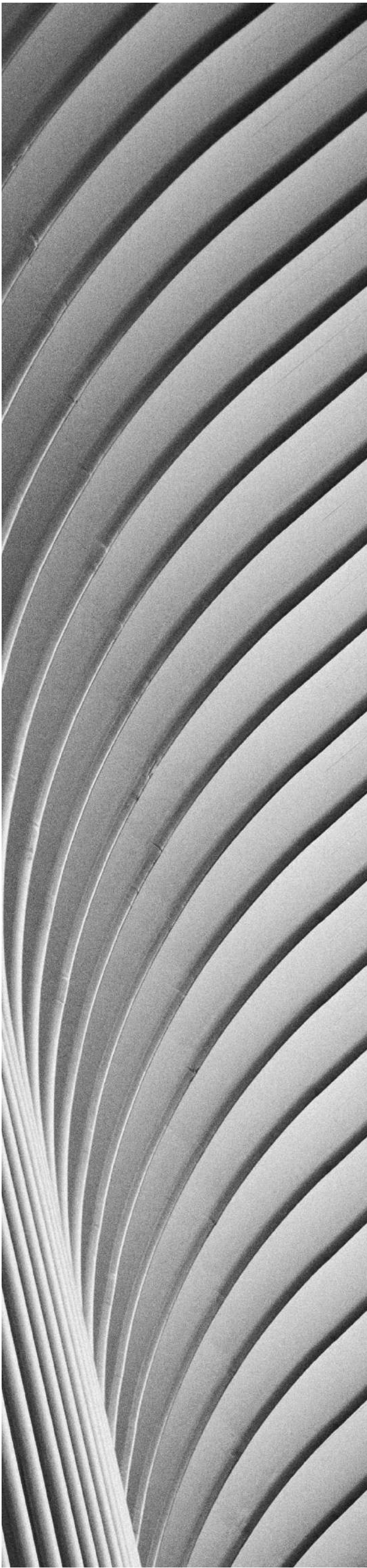# The Only Sales Templates You'll Ever Need

Closing deals
at every sales stage with
PandaDoc & HubSpot

Table of contents

Finding the perfect sales template is stupid-hard

So, you've been tasked with finding polished, client-facing templates that delight and inspire action. In your pursuit, you've probably curated a string of Google searches that read something like this:

Dear Google,

Please give me the perfect template for qualifying a prospect for a discovery call. Oh, and I need a template that will impress my prospects for the other seven stages of my sales cycle too.

Love,
Your Favorite Sales Rep

We've all been there.

Search results often show outdated templates and guides that look like they were built in 1996. Finding the perfect sales templates to generate revenue shouldn't be this hard.

That's why HubSpot and PandaDoc teamed up to create this eBook, offering you beautiful, effective templates designed and tested to help you bring in new revenue. Since you're busy and need to find the right template quickly, we won't waste your time with unnecessary content.

In fact, we don't expect you to read all of this content—and that's OK.

Scroll to the sales stage you need a template for and download it at no cost. Then, see if it's useful. Feel free to come back anytime you need help with your sales process and grab our other templates, tips, and information. We'll be here, ready to help whenever you need it!😊

Qualifying Leads

⤵ A Template with 101 Questions to Identify Your Ideal Customers
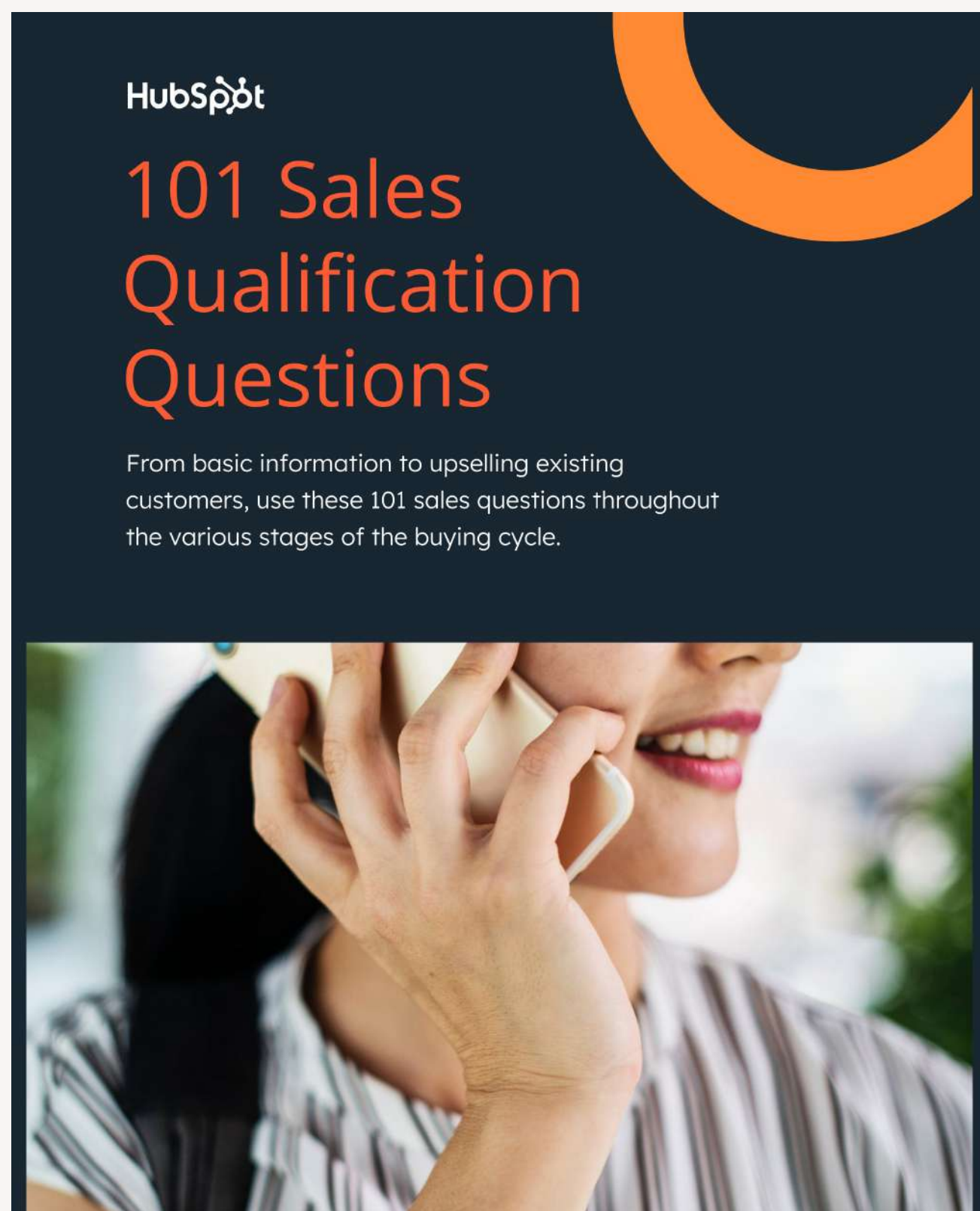
Why you need this template

No matter which sales qualification framework you follow (BANT, MEDDIC, CHAMP Sales, etc.), you should spend less time searching for the right document templates and more time talking to people.

The best part about this template is that it goes beyond just qualification. It covers:

- Awareness questions
- Need questions
- Business impact questions
- Closing questions
- Budget questions

- Timeline questions
- Competitor questions
- Upselling questions
- Questions to ask yourself

When it comes to lead qualification, this template equips you with the exact questions you need to ask to determine, "Who is the best person or company to buy my product?"

How did this template work for us?

101 Sales Qualification Questions

From basic information to upselling existing customers, use these 101 sales questions throughout the various stages of the buying cycle.

PandaDoc's outbound sales development representatives (SDRs) tested this template over a 4-week period on over 2,000 SQLs.

After implementing their favorite questions from the 101 Questions template, PandaDoc's SDR team saw a 15% increase in their appointments set.

2
SALES REPS

4
WEEKS TESTED

2k
CONTACTED LEADS

5
QUESTIONS CHERRY-PICKED

15%
RATE INCREASE RESPONSE

What ways can you implement this template now?

Two PandaDoc Sales Reps, Connor and Max, reported that they found five questions particularly helpful as focal points for getting conversations rolling during introductory calls.

Take a look below and see if these questions are worth adding to your lead nurturing efforts today.
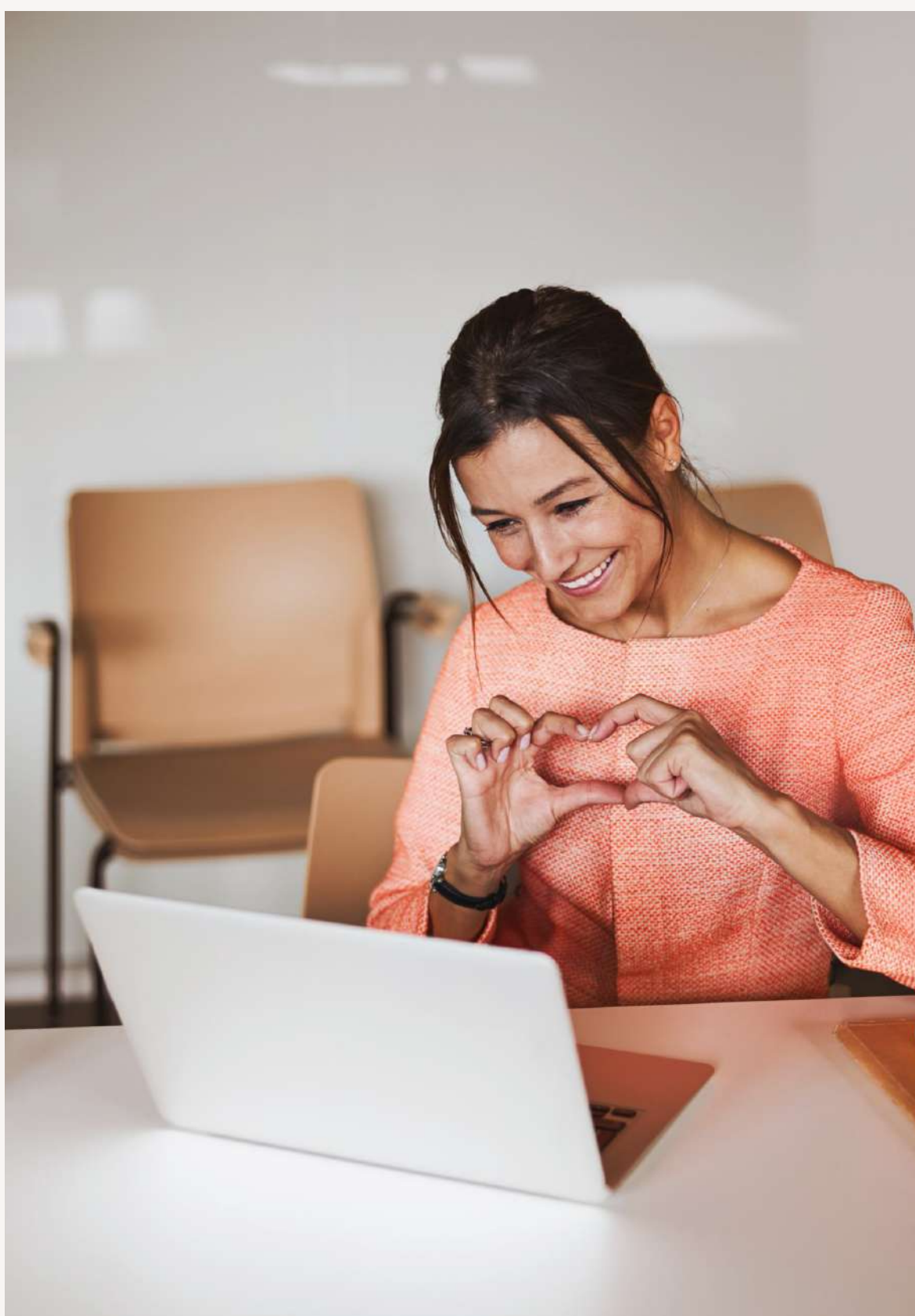
AWARENESS:

Who first decided to explore the idea of this solution within your company?

BUDGET:

Do you currently have a budget allocated for this solution, or will you have to make the case for one?

AUTHORITY:

Is there anyone else in your company you'd like or need to include in these discussions?

NEED:

One of the most common issues we keep hearing about is [blank]. Is this an issue for you?

TIMELINE:

What is your timeline for making a decision on this solution? Are you looking to do this now, next quarter, or further down the line?

Discovery Calls & Presentations

Sleek presentation templates to get someone to buy your stuff

Why you need this template

While the focus of your discovery call should be on the questions and conversation, having a strong visual to guide your prospect is crucial.

The best part about this template is that it includes four eye-catching presentations:

- One creative PowerPoint template
- One data-focused PowerPoint template
- One formal PowerPoint template
- One simple PowerPoint template

Your discovery calls and presentations will now set the tone with a polished look and feel. No Photoshop is required to make these slides pop as you tailor them for your calls.

How did this template work for us?

PandaDoc's VP of Marketing, Shawn Herring, recognized that aligning new messaging earlier this year was crucial for PandaDoc's growth. He wanted to avoid sales presentations that strayed from PandaDoc's updated messaging. By including sections focused on areas beyond product features, prospects began converting more often with these new templates.

Now, all PandaDoc sales presentations include sections that emphasize their brand, services, and competitive differentiators. In other words, everyone is on the same page.

Since implementing these updated template designs in Q1 2019, training new sales team members has become more streamlined and cohesive. Even PandaDoc's veteran reps were pleased to have fresh, polished content and templates to use moving forward.
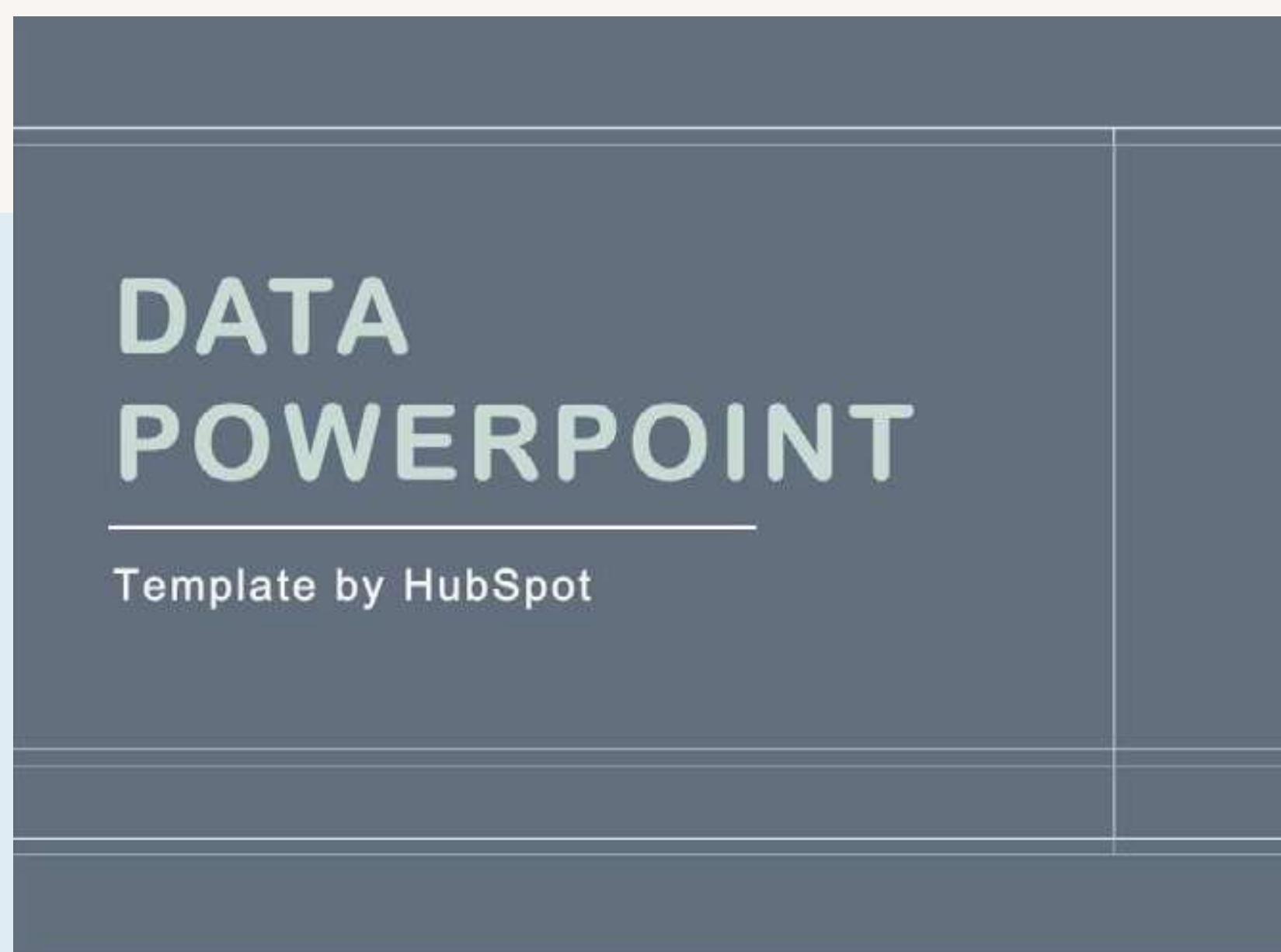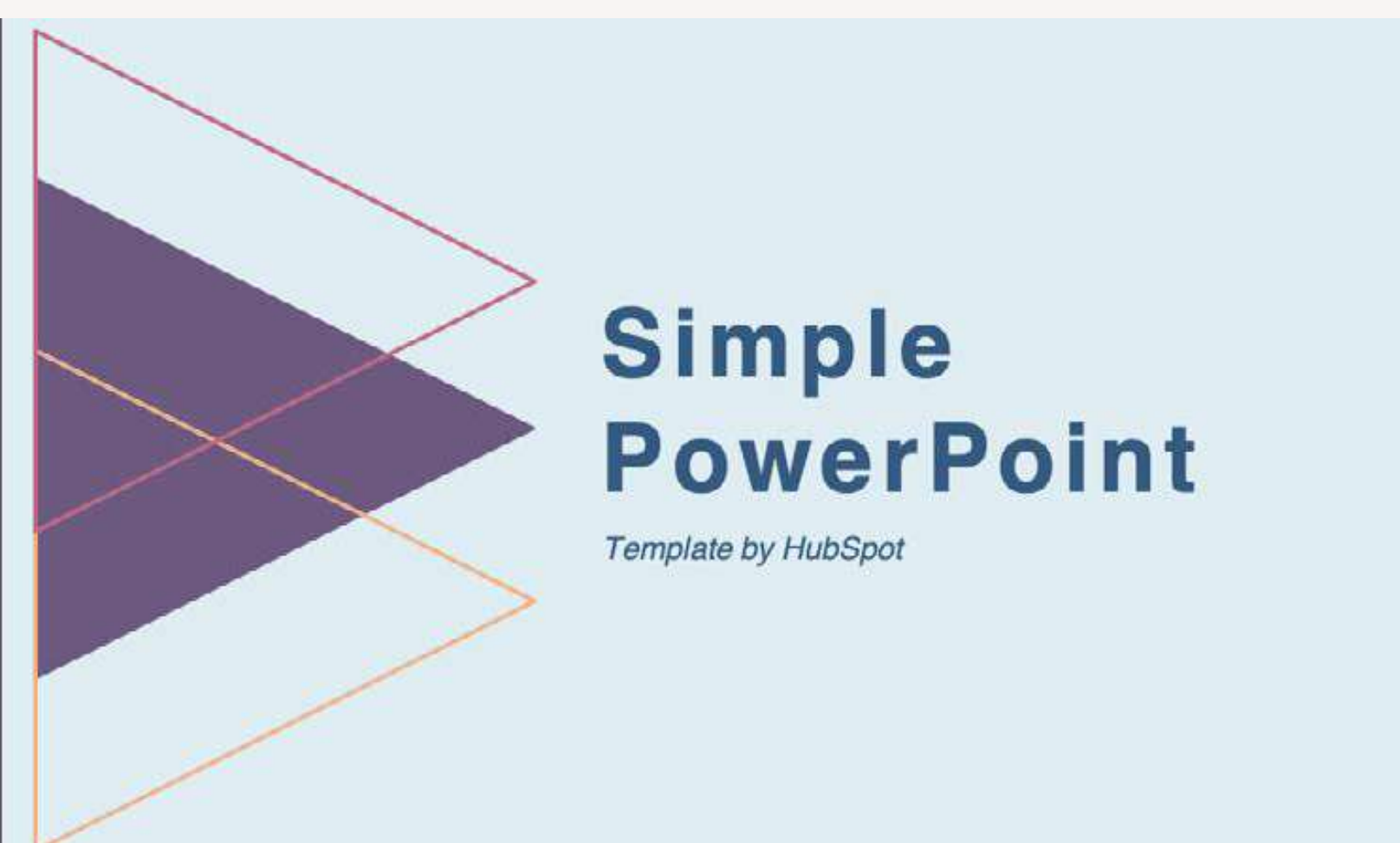
What ways can you implement this template now?

PandaDoc found that these templates worked best when they incorporated strict brand guidelines from their in-house design team. Make sure to integrate your brand identity to ensure consistency with other company materials.

Take a look below and see if these templates are worth adding to your lead nurturing efforts today.

Simple PowerPoint
Template by HubSpot

DATA POWERPOINT
Template by HubSpot

Creative Powerpoint
Template by HubSpot

Professional Style PowerPoint
Template by Hubspot

Follow-Up Communications

25 Proven Sales Email Templates

Why you need this template

Following up with prospects can be tricky. Being too pushy or aggressive can scare them away or annoy them, while forgetting to follow up at the right time can result in losing the deal. There's a fine line between persistence and annoyance in follow-up communication.

With HubSpot's sales email templates, you can get in front of your prospects and guide them to the next step with precision and empathy. In addition to follow-up emails, this template bundle includes:

- First touch emails
- Post-voicemail emails
- Next-step emails

- Unresponsive emails
- Drip series emails
- Relationship-building emails

It's time to discover new, creative ways to reach out and send emails that actually convert. These templates are ready for you to personalize to fit your company, industry, and message.

How did this template work for us?

PandaDoc's marketing and sales teams tested these email templates over a seven-week period on nearly 10,000 leads actively engaging with our product.

After implementing their favorite templates from the bundle, PandaDoc's sales reps saw a 10% increase in email opens, a 90% increase in replies, and a nearly 40% increase in new business generated.

7
WEEKOF TESTING

10k
EMAILS SENT

10%
INCREASE IN OPENS

90%
INCREASE IN RESPONSES

15k
REVENUE FROM DEALS CLOSED

What ways can you implement this template now?

PandaDoc's sales and marketing teams found that personalized email templates tailored to prospect behavior or actions resulted in the highest engagement rates.

For example, a follow-up template used after a discovery call achieved a 47% open rate and an 8% response rate.

Hi [Prospect),

I really enjoyed our phone conversation [or meeting] earlier today and especially liked learning about your unique role at [company]. I understand the challenges you are facing with [challenges discussed] and the impact they are having on [insert personal impact].

As promised, I have attached [or linked to] the resources and materials that can help you better understand how we can help you solve [insert compelling reason to buy].

Please let me know if you have any questions. Otherwise, I look forward to talking with you again on [date and time].

[Signature line]
[Salesperson]

If you are just looking for follow-up templates, take a look at the emails we put together here.

Another effective template acknowledged how annoying these emails can be. Our reps found that prospects appreciate authenticity, and this template, used later in the conversation, averaged a 52% open rate and a 10% response rate.

Hi [Prospect], this is [Salesperson]. I am sorry we haven't been able to connect. When we met, you were very interested in increasing your sales [objective]. I know how busy things can get with work and family.

I want you to know that I don't mind scheduling a call before or after work hours if that would make it easier. Just let me know what works for you. I don't want to be a pest, but I do want to make sure we have an opportunity to talk if you still want to fast track your sales growth [objective].

Sending the Proposal

A Sales Proposal Template To Creatively Show Someone What They Get
(When They Buy Your Stuff)

Why you need this template

There aren't too many companies that can confidently tell us their proposals are created, sent, and signed in an efficient and professional way at scale.

Your sales team needs to crank out personalized, beautiful proposals that generate revenue.

And you need to do it day-after-day. Checkout PandaDoc's most popular templates and see why it's the foundation for what top-selling sales teams are using to crush quotas.

This template includes the ability to customize the following:

- Names
- Dates
- Emails
- Products

- Prices
- Addresses
- Phone Numbers
- eSignatures

- Images
- Colors
- Backgrounds
- Videos

How did this template work for our clients?

We've taken a deep dive into how our clients' proposal templates are performing, and the results are promising.

The average PandaDoc customer is now saving an average of 12 hours a week, increasing close rates by 28%, and seeing an 18% boost in the average sale price when using PandaDoc's tools and templates. Just in case you didn't realize what these numbers mean...

**Decreasing doc creation time by 65% gives sales teams an extra workday to sell every week.**

1
YEAR OF TESTING

12k
CUSTOMERS LIVE

65%
DECREASE IN TIME WASTED

28%
INCREASE IN CLOSE RATES

18k
INCREASE OF AVG. SALE PRICE

What ways can you implement this template now?

We recommend you begin by taking a look at the PandaDoc template library <u>here</u>.

Find a sales proposal template that fits your industry, and tailor it in a way that lines-up with the needs of your organization. Think of these templates as a quick starting point for your team to tap into pre-approved content that's ready-to-use.
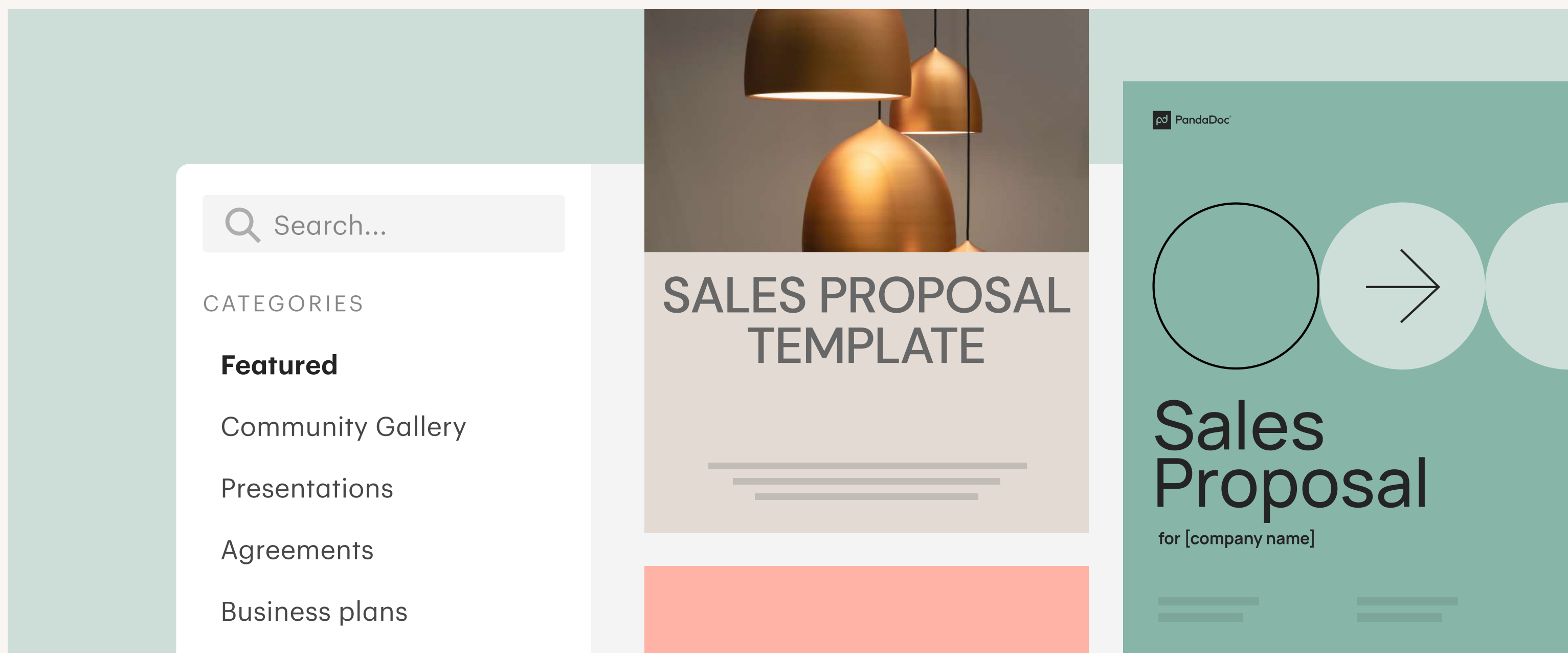
If you'd like to try out the editor to start tinkering, <u>sign-up for a free 14-day trial</u> (no credit card required). And if you're looking for a little help <u>getting started</u>, watch this quick video below to create your first template!

PandaDoc 101 - Editable Template

Negotiating the Cost

Scripted Templates For When A Prospect Asks For A Discount

Why you need this template

Some people love to haggle over a price. Others won't touch negotiation conversations with a 10-foot pole because they hate confrontation. Regardless of how you feel, pricing conversations are the nature of the sales beast we all must face.

Before giving an estimate or a discount of any sort, make sure you've equipped yourself with the right strategy for talking about pricing. Inside this template, we've got responses for you to keep up your sleeve that'll work in almost any situation.

With this template you'll find:

- Objections you can't overcome

- How to avoid discounting too early

- Tip for handling pre-demo discount requests

- A guide for assessing a reasonable discount

- Ways to confront through inquiry

- A method for trying out the monthto-month option

- And much more!

Proving your full-value to a potential customer shouldn't be somethingyou dread. With this template, you'll be confident you can address everytype of pricing negotiation situation.

How did these templates work for us?

HubSpot wanted to try out these tactics during real pricing conversations, which we documented to share with you. We're hoping these responses will help you understand how pricing conversations can become fruitful endeavors, instead of avoided scenarios.

Below are two moments we captured from our call transcripts using this template.

TRANSCRIPT #1

Comparing products/service pricing

By positioning the response this way, the sales rep figured out that the prospect didn't need a bundled package, and instead was a better fit for just one of HubSpot's individual products.

Prospect: "So who do I talk to about pricing? Is that you or somebody else?"

Sales Rep: "I can help you with that, what questions do you have?"

Prospect: "I looked at the pricing online and was wondering about what discounts you offer."

Sales Rep: "So before we get into discounting, I wanted to go over what features you're looking for exactly, so as to ensure I can make the best recommendations moving forward."

Prospect: "Well we were looking at your Enterprise Growth Suite, but we really just | need marketing automation tools, landing pages, and email marketing."

Comparing products/service pricing

By asking this question, the sales rep determined whether the prospect saw value in HubSpot's offering over the Pardot offering. The rep reestablished the prospect's interest and was able to recommend a better product.

Prospect: "I'm just wondering about a discount for such a large contract. Is there anything you can do here to bring that cost down?"

Sales Rep: "Are you saying you think this is a little too expensive? Or that you don't want to spend more than $XX,XXX."

Prospect: "Our budget is set at $XX,XXX. Unfortunately, there's no wiggle room on that."

Sales Rep: "So I remember you told me you were considering Pardot because you needed an email drip campaign tool, but we also offer that in a different pricing option for XX,XXX if you don't want to spend more than that."

Prospect: "Oh, that's great to know, will you send me that option in a quote so we can compare with our finance team?"

What ways can you implement this template now?

HubSpot's sales teams felt these scripts were most useful when they were practiced and repeated.

Also, using someone else's words can come across as inauthentic and difficult. It's like trying to tell someone else's joke - the punchlines just don't land the same. Take these concepts and try them out using your own words.

Here are two ways you could give this a try right now:

WAY 1

Practice a few sales training scenarios where you take turns with a colleague and improv these tactics in your own scripts to be used on the fly.

WAY 2

Include this in your training docs that you and your team use with new-hires. That way it's set up from the beginning for new additions to your team.

Preparing the Contract

A Simple Contract Template Someone Can Agree To & eSign

Why you need this template

Contracts are all about simplicity. Because the back and forth of a contract can be a major pain, it's critical that your workflow (creation, negotiation, and management) are easy-to-make and error-free.

PandaDoc's sales team wanted to save time and make this a pain-free process by using a standardized template that could be quickly adjusted for unique terms and conditions.

This template includes the ability to customize the following:

- Sender Company
- Document Created Date
- Period of Performance
- Client Name
- Deliverables
- eSignatures
- eSignature Date

- Type of Work
- Start Date
- Pricing Tables
- Invoice Schedule
- Client Address
- Much More!

How did these templates work for us?

PandaDoc's growing sales team generated millions in revenue after implementing updated contract templates. Their sales team also reported that they experienced fewer client questions, a quicker turnaround time, and increased productivity with this template.

Head of PandaDoc Sales, Michael Paladino felt that updating his sales team's contracts worked wonders for his team.

"

Overhauling our contracts with this template made our lives easier and our wallets fatter – it was a no brainer."

According to Michael, there were two main reasons this specific template resonated with prospects.

A clean pricing page makes it easy for prospects to digest the financials quickly ⟶

Price and Payment Schedule

The total Time and Materials (T&M) maximum amount or "not to exceed" (NTE) amount is $10.000 plus pre-approved travel expenses and ODCs. The below table lists the labor categories, rates, and estimates used to calculate the T&M costs for the effort.

Name	Price	QTY	Subtotal
	$0.00	1	$0.00
	$0.00	1	$0.00
	$0.00	1	$0.00
	$0.00	1	$0.00
		Subtotal	$0.00
		Total	**$0.00**

All travel, lodging, and entertainment expenses must be pre-approved by [Client.FirstName] [Client.LastName] in writing, and will be in addition to the above-stated NTE amount. At its option, [Client.FirstName] [Client.LastName] will book all travel and related expenses. Service Provider's rates and prices do not include sales tax, and if such tax is applicable, it will be invoiced as a separate line item.

Invoice Schedule

Service Provider will invoice [Client.FirstName] [Client.LastName] on a monthly basis for actual hours expended.

In addition to the above, ODCs and pre-approved travel expenses will be billed as incurred. Invoices shall be mailed to the following address:

[Client.FirstName] [Client.LastName]

[Client.Address]
[Client.CityStateZIP]
Attention: [Client.PokeName]

Agreed and Accepted:

[Sender.Company]   [Client.Company]

Signature	Signature
MM / DD / YYYY	MM / DD / YYYY

[Sender.FirstName] [Sender.LastName]   [Client.FirstName] [Client.LastName]

⟵ Adding eSignatures eliminated delays in printing and distributing.

What ways can you implement this template now?

It's time to do a damage assessment.

Take a look at your existing contract process and check all that apply.

☐ You use a word processor (Microsoft Office, Google Docs, etc) to create and edit contracts

☐ Your contracts end up as attachments in ridiculously long email threads

☐ Following-up with prospects about your contracts is a total guessing game

☐ When legal counsel gets involved, you're having to repeat the steps above

If you checked one or any of the boxes, don't feel bad!

Try using this contract as a starting place for your team and using the PandaDoc editor to customize it for your team.

If you just want to download the .pdf and share it with your team just download this version.

Securing the Invoice

A Smarter Invoice Template To Avoid Frustrations With Payments

Why you need this template

There is no need to overcomplicate an invoice. It's simply a document that shows a customer's obligation to pay for a product or provided service.

The structure of your invoice might vary by business (slightly) but it essentially boils down to the following:

- Your name/your business' name
- Customer name and contact information
- Goods or services (line items)

- Sales terms
- Conditions
- Signature area

But an invoice can be so much more than a static bill of sale. By using PandaDoc's Invoice Template and HubSpot's Invoice Template Generator you can make sure you are paid on-time, every time. Let's show you how we've been doing it.

How did these templates work for us?

After testing out these two templates, we've realized that the key to successful invoicing is to simplify and automate by client-type. Said another way – different products require different solutions.

For PandaDoc, we wanted to equip larger sales teams with in-doc commenting, and built-in CRM integrations for data automation. We paired this template with the PandaDoc free trial to track and monitor invoices and electronic payments.

For example, when closing businesses with an enterprise account, PandaDoc account executives intentionally eliminated the usual frustrations of traditional invoicing by leveraging automatic invoice generation for teams to easily go backand- forth.

This was critical for bigger companies, because connecting invoices to a CRM populated customer data, company information, and product details instantly. If invoices needed to be updated or shipped out regularly, this process saved time and stress by setting calendar date renewals.

What ways can you implement this template now?

Our sales teams felt these invoices were most useful when they were combined with the right tools. Depending on your operational setup, you might consider looking at the following:

WAY 1 ──

Look into connecting your invoice template with an <u>electronic payment method</u>. This makes it stupid-easy for customers to pay. Your recipients should pay electronically via your preferred gateway such as Stripe, PayPal, Square, QuickBooks, and more!

Software Services Invoice for Acme inc.

Total due
$5,000.00

🔒 **Pay now**

Make payment

EMAIL
john@doe.com

🗀 Card	Ⓢ Stripe	PayPal

CARD NUMBER
1234 1234 1234 1234   VISA ⬤⬤ AMEX

EXPIRY   CVC
MM / YY   CVC
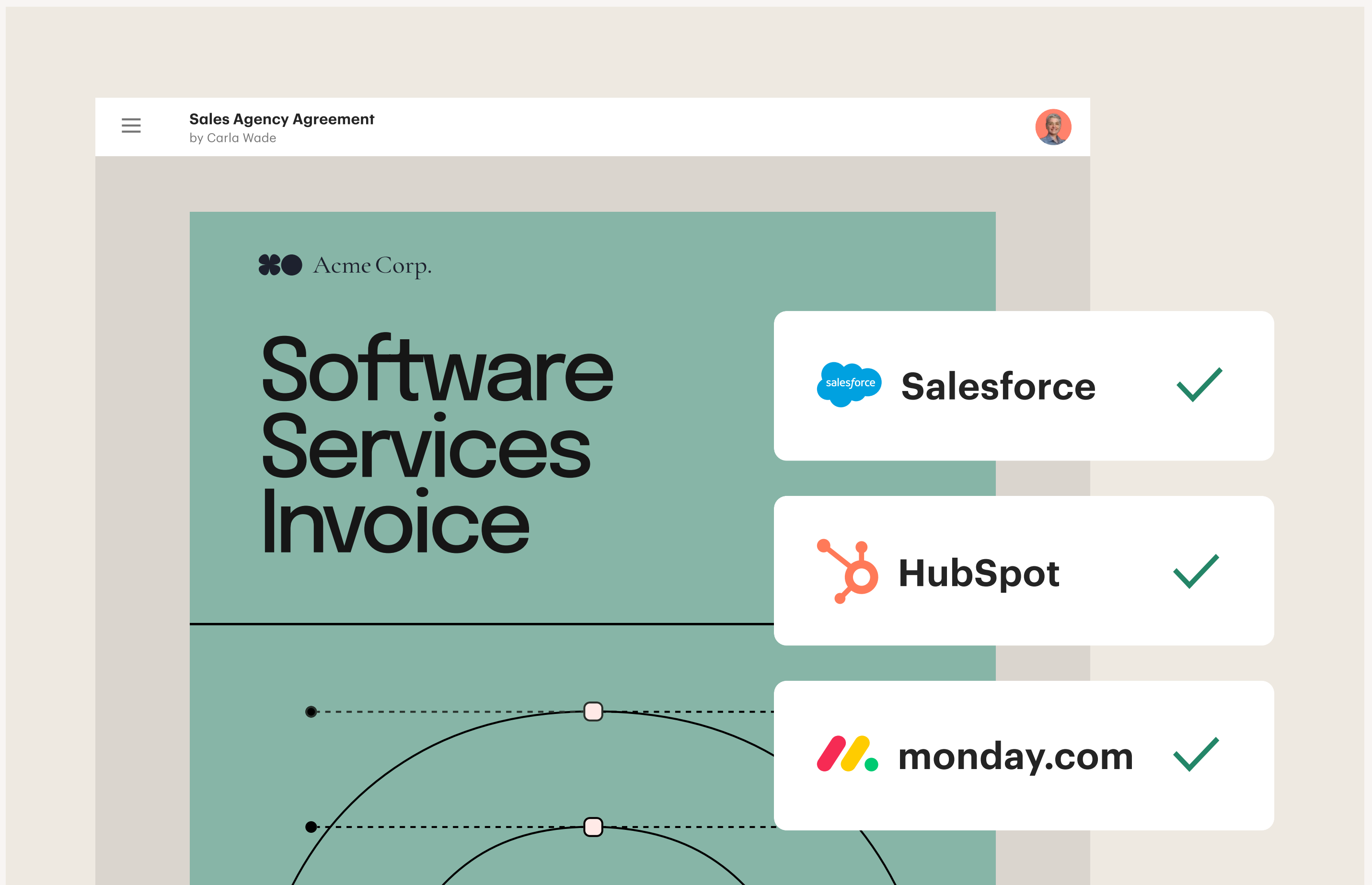
Figure out how to connect your CRM with invoicing documentation to automate the process. This page hosts a number of CRM integration options for you to consider. A 2-way sync will establish processes that streamline your workflows.

Getting the complex eSignature done

A Few Simple Signature Templates For Handling Complicated Agreements

Why you need this template

Certain documents can be a little intimidating. You know the ones we're talking about. They are the W-9s, the MNDAs, and the lease agreements of the document world. These guys have a tendency to be just a little complicated.

The structure of your invoice might vary by business (slightly) but it essentially boils down to the following:

Whether you're required to sign these by the IRS or by a housing association, make sure you're rocking them with eSignatures like a pro by using these templates.

How did this template work for our clients?

We didn't test these templates ourselves, but here's what two clients had to say about using some of our templates for the more complex deals.

NDAs

Lex Helper uses PandaDoc's Proposal, Quotes, Contracts, Forms, and NDAs to help small independent attorneys spend more time in court, and less time with basic admin tasks.

They have seen at least a 30% increase in close rates with PandaDoc's NDAs.

Check-out our tips for NDAs here.

Download our NDA template here.

"

It has simplified our previous process by eliminating the need to print, scan, and return."

Brian Minick

Ops Manager, SproutLoud

W9 + HR Docs

Lex Helper uses PandaDoc's Proposal, Quotes, Contracts, Forms, and NDAs to help small independent attorneys spend more time in court, and less time with basic admin tasks.

Using PandaDoc's solutions and templates save TPD about $3,700 and 188 hours per month. They have also decreased their onboarding time by 75% with a streamlined approach to create and maintain consistency that catches errors faster and more accurately.

Check-out our tips for W9s here.

Download our W9 template here.

"

Having approved content and standardized workflows in place allows our people to optimize their use of time."

Kelsey Boyd

Director of Business Systems

What ways can you implement this template now?

One of our very favorite resources is our "How to electronically sign documents?" page.

This page gives you instructions on how to sign the most popular document types via PandaDoc.

We recommend studying up on the use-cases, learning a little bit about how to make static documents like the W9 and turning it into a digital document that can be completed and signed all without scanning and printing. All the steps are outlined here with neat screenshots like the one below.

Even more sales templates for your team

If you're reading this section, that means one of the following:

1 You got everything you needed from this super useful eBook. (You're welcome.)

2 You scrolled all the way to the end, just to see how long this eBook is. (It's long.)

3 You wanted to see if there was anything else useful we could provide. (Oooo yes!)

You didn't think we'd just clock-out from this eBook and call it a day, did you? We are proud to present the resources and templates that were worth honorable mentions for each sales stage. Think of it as a little extra sauce for your sales sandwich.

STAGE 1 - QUALIFYING LEADS

21 HubSpot Sales Qualifying Questions ↗

6 PandaDoc Free Trial Follow-Up Questions ↗

STAGE 2 - DISCOVERY CALLS & PRESENTATIONS

HubSpot's Essential PowerPoint Templates ↗

HubSpot's Infographic Templates ↗

STAGE 3 - FOLLOW-UP COMMUNICATIONS

10 HubSpot Sales Email Templates
With 60% Open Rates ↗

HubSpot's Email Marketing Kit for Startups ↗

STAGE 4 - SENDING THE PROPOSAL

PandaDoc's Graphic Design Proposal ↗

PandaDoc's Marketing Proposal ↗

STAGE 5 - NEGOTIATING THE COST

HubSpot's Role Play Exercises For Negotiation ↗

HubSpot's 9 Responses For Discount Requests ↗

STAGE 6 - PREPARING THE CONTRACT

PandaDoc's Employment Contract Template ↗

PandaDoc's Freelance Contract Template ↗

STAGE 7 - SECURING THE INVOICE

PandaDoc's Blank Invoice Template ↗

PandaDoc's Freelance Contract Template ↗

STAGE 8 - GETTING THE COMPLEX ESIGNATURE DONE

PandaDoc's W2 Form ↗

PandaDoc's 1099 Form ↗

Create, send, track, and eSign sales proposals & quotes

Some of you curious cats might be wondering about what the deal is with PandaDoc and HubSpot?
Do they have some sort of partnership going on?

You bet we do!

We help you build professional-looking proposals, quotes, and contracts without leaving your HubSpot CRM. Generate and customize new documents in minutes using editable templates or uploading your documents right from the PandaDoc module in Contacts, Companies, or Deals objects.

Click here to learn about how you can build and edit documents with auto-populated data all from within the HubSpot interface you're familiar with.

But wait, there's more. ⟶

Here are additional features for improving your sales process with HubSpot + PandaDoc:

Some of you curious cats might be wondering about what the deal is with PandaDoc and HubSpot? Do they have some sort of partnership going on?

→ Get your contracts signed easily with eSignatures

→ Closely track document progress from HubSpot

→ Get started fast, no coding required

→ Auto-fill pricing tables with products from HubSpot

Get the HubSpot <> PandaDoc integration right here.

The Only Sales Templates You'll Ever Need