PandaDoc®

The Next Move for RevOps

A BLUEPRINT FOR BUILDING SMARTER GTM SYSTEMS

Workflows aren’t just operational, they’re strategic

These essential sequences — most often performed in software to complete business tasks — determine how fast you move, how much you close, and how well your teams align. And the smartest GTM leaders can recognize workflows for what they really are:

The silent architecture of speed, revenue, and scale.

RevOps leaders aren’t just building systems, they’re **designing experiences.**

Because every stage in your GTM motion, from lead to quote to contract to renewal, is packed with micro-frictions:

- A lead gets routed to the wrong rep.
- A discount approval stalls in someone's inbox.
- Customer onboarding kicks off days after the contract is signed.

These aren't isolated glitches. They're signs that your workflows weren't built to scale.

That's when it's time to step back and re-evaluate your software processes, because if these processes are broken, new technology alone can't fix them. But the good news?

When workflows are intentionally designed, technology becomes a superpower.

Not a patch, but a force multiplier — accelerating efficiency, alignment, and scale.

This is why savvy RevOps leaders are rethinking revenue workflows across the customer journey and empowering the GTM organization to reclaim time.

In this ebook, we'll break down the most common workflow friction points slowing GTM teams down — and show you how today's top RevOps leaders are designing smarter systems to eliminate them. Whether you're focused on quoting, handoffs, renewals, or forecasting, this guide will help you rethink revenue workflows with speed, scale, and strategic impact in mind.

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The invisible friction dragging down your GTM engine

Workflow friction rarely shows up in your dashboards, but it slows down revenue every day. You can't always see it in metrics, but you feel it everywhere:

- Leads go dark because routing rules are outdated.
- Reps create their own quoting workarounds.
- Customer Service (CS) discovers special terms after onboarding starts.
- Managers review pipeline updates that were never entered.

These are indicators that your operational design isn't keeping pace with the complexity of your go-to-market strategies.

What causes the drag?

TOOL SPRAWL	Teams toggle between tabs just to move work forward
MANUAL HANDOFFS	Key steps live in someone's head, not the system
APPROVAL BOTTLENECKS	Sales velocity dies in email threads and Slack pings
REACTIVE PROCESS DESIGN	Flows were built to patch issues, not scale with growth

The result: misalignment, missed steps, and momentum lost in the gaps. And as your team grows, the friction multiplies.

Why RevOps needs to own workflow experience — not just tooling

RevOps isn't here to chase tickets or patch together reports. It's here to design how revenue actually moves across systems, people, and tools.

Owning tooling is table stakes and best-in-class RevOps teams go further. They architect end-to-end workflows that turn quoting, contracting, onboarding, and renewals into a single, seamless motion, not a patchwork of disconnected tasks.

That shift requires a different mindset, one that moves from:

- TRACKING PROCESS → DESIGNING WORKFLOWS
- REPORTING ON REVENUE → ACCELERATING REVENUE
- FIXING TOOLS → ARCHITECTING EXPERIENCES

When RevOps owns the experience, not just the stack, they stop being a support function and start becoming a strategic growth driver.

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Best-in-class RevOps teams act as strategic partners, architecting scalable infrastructure to withstand market shifts, unlock growth, and maximize profitability.

ALLISON SPINELLI

Vice President of Revenue Operations, PandaDoc

Where modern RevOps teams are creating leverage

The goal isn't just to move faster. It's to build connected, scalable systems that give your team the tools, triggers, and automation they need to keep revenue flowing without interruption. For modern RevOps leaders, that means looking beyond isolated fixes and taking full ownership of how revenue moves across systems, teams, and the entire customer lifecycle.

Bottlenecks show up in every corner of the GTM engine, from quoting to routing to onboarding to renewals. But they all point to the same issue: workflows that weren't built to scale. You don't have to rebuild everything — you just have to fix what slows you down the most.

Let's take a look at what workflow areas slow Revenue teams down the most.

1. QUOTING

THE PROBLEM:

Manual quoting leads to errors, delays, and approvals that stall deals. Reps rely on outdated templates and discounts get flagged after contracts are signed. Finance is looped in too late and momentum slips away.

As the saying goes, "Time kills all deals." In a competitive market, every minute matters. Speed isn't a nice-to-have, it's a revenue multiplier.

WITH A MODERN WORKFLOW, TEAMS CAN:

- Use CRM triggers that generate pre-approved quotes automatically.
- Apply smart logic to discounts, pricing rules, and approval routing based on deal conditions.
- Allow reps to build and send quotes from one screen rather than a cluster of disconnected tools.

THE RESULT:

Faster quotes, fewer errors, and approvals that happen in the background — not the inbox. It's more control for Finance, ore speed for Sales, and more consistency across the board.

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Quoting delays aren’t just inefficiencies — they’re revenue leaks. Respond faster and with precision. Win more deals.

ALLISON SPINELLI

Vice President of Revenue Operations, PandaDoc

2. CONTRACT EXECUTION

THE PROBLEM:

Contracting is disconnected from the sales process. Legal reviews every deal manually. Sales loses visibility. CS is looped in after the handoff, if at all.

Deals stall in long approval threads. Teams operate in silos. And customers are left in the dark, waiting for updates or chasing paperwork when they should be onboarding. What should feel like a milestone becomes a point of friction.

WITH A MODERN WORKFLOW, TEAMS CAN:

- Generate contracts automatically from quote data.
- Apply conditional clauses dynamically based on deal structure, location, or industry.
- Execute approvals and redlining in-platform with built-in routing and notifications.
- Sync status updates with the CRM and notify stakeholders, including CS, in real time.

THE RESULT:

Sales cycles shrink, compliance improves, CS is prepared, and handoffs feel seamless, not chaotic. On the other side, customers experience a smooth, confident close, rather than a confusing pause between “yes” and “go.” With one connected workflow, teams stay aligned, and deals stay on track.

3. RENEWALS

THE PROBLEM:

Renewals are reactive. Reps rebuild documents from scratch. Reminders go out too late. And upsell opportunities are missed because there's no proactive system in place.

Internally, teams scramble. Externally, customers feel the friction, from sudden contract requests to missed context on their usage or needs.

WITH A MODERN WORKFLOW, TEAMS CAN:

- Automatically initiate renewal workflows before contract expiration; including reminders, task assignments, and document generation.
- Auto-fill documents with account history, pricing, and product usage.
- Automate approval routing, follow-ups, and signatures so they're not rushed or forgotten.

THE RESULT:

Predictable, scalable renewal workflows, higher retention and — most importantly — customers who feel seen, valued, and supported.

4. LEAD MANAGEMENT AND ROUTING

THE PROBLEM:

Leads sit idle, reps cherry-pick what they want to work, and BDRs waste time triaging queues. Meanwhile, Marketing is left wondering what happened to all those MQLs.

Without a reliable, scalable routing process, revenue gets delayed before it even starts. And for prospects? Slow follow-up kills trust, especially when they've shown interest and hear nothing in return.

WITH A MODERN WORKFLOW, TEAMS CAN:

- Route new leads are automatically based on ICP fit, territory, or product line.
- Score leads with real engagement data, not just form fills.
- Trigger SLA-based alerts when a lead isn't touched within a set timeframe.
- Log Attribution and ownership at the system level, not manually.

THE RESULT:

Faster follow-up, cleaner attribution, and higher conversion. Internally, teams stay focused and efficient. Externally, prospects experience timely, relevant engagement for a better, preferred buying experience.

5. SALES-TO-CS HANDOFFS

THE PROBLEM:

The moment the deal closes, the experience goes quiet. CS doesn’t know what was sold. Onboarding starts late — or not at all. Critical context lives in a rep’s head instead of in the system.

Internally, that means friction. For the customer, it means showing up to kickoff calls confused, repeating themselves, and questioning whether your team is aligned. A weak handoff puts customer confidence at risk.

WITH A MODERN WORKFLOW, TEAMS CAN:

- Trigger onboarding checklists and assign CS owners when contracts are signed.
- Auto-generate internal handoff documents from CRM and PandaDoc fields.
- Keep key milestones (like kickoff or first billing) pre-loaded into onboarding plans.
- Ensure the CS is looped in before the signature, not after.

THE RESULT:

Onboarding starts on time, CS stays aligned, and customers get a seamless experience from day one, not confusion and follow-up emails.

6. FORECASTING AND PIPELINE HYGIENE

THE PROBLEM:

Forecasting is guesswork. CRM data is outdated or incomplete, leaving managers to spend hours in 1:1s trying to figure out what's real. And reps forget to update stages until the end of the month, or not at all.

WITH A MODERN WORKFLOW, TEAMS CAN:

- Trigger forecast snapshots and automated check-ins at every deal stage.
- Stay alert to inactivity or missing data in real time.
- Auto-close dead deals after a set period unless manually flagged.
- Pull forecast reporting directly from workflow activity, not just rep input.

THE RESULT:

Cleaner pipeline, more reliable forecasts, and fewer surprises at the end of the quarter because the system stays up to date without manual policing.

What happens when RevOps designs workflow?

How HAAS Alert reclaimed 80% of its quoting time

When Emerson McEwan stepped into his role as Head of RevOps at HAAS Alert in Chicago, IL., quoting was a silent time sink. Reps were creating documents manually. Finance had to review every quote before it could be invoiced. And instead of selling, the team was chasing formatting, line-item accuracy, and approval pings.

It wasn’t just slow — it was holding back their entire revenue engine.

So Emerson stepped back, looked at the full process, and redesigned it from the ground up.

Using PandaDoc CPQ with HubSpot, he created a guided, automated quote workflow that gave reps autonomy with guardrails and eliminated 80% of the time they used to spend quoting.

THE IMPACT:

Quotes are sent in minutes instead of hours.

Finance is freed from repetitive approvals.

A no-code workflow is owned entirely by RevOps.

The team is positioned to scale without adding headcount.

This is what happens when you stop patching processes and start designing custom workflows: Even lean teams can move faster, without losing oversight.

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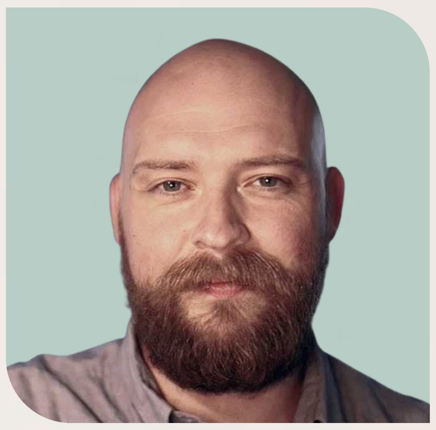
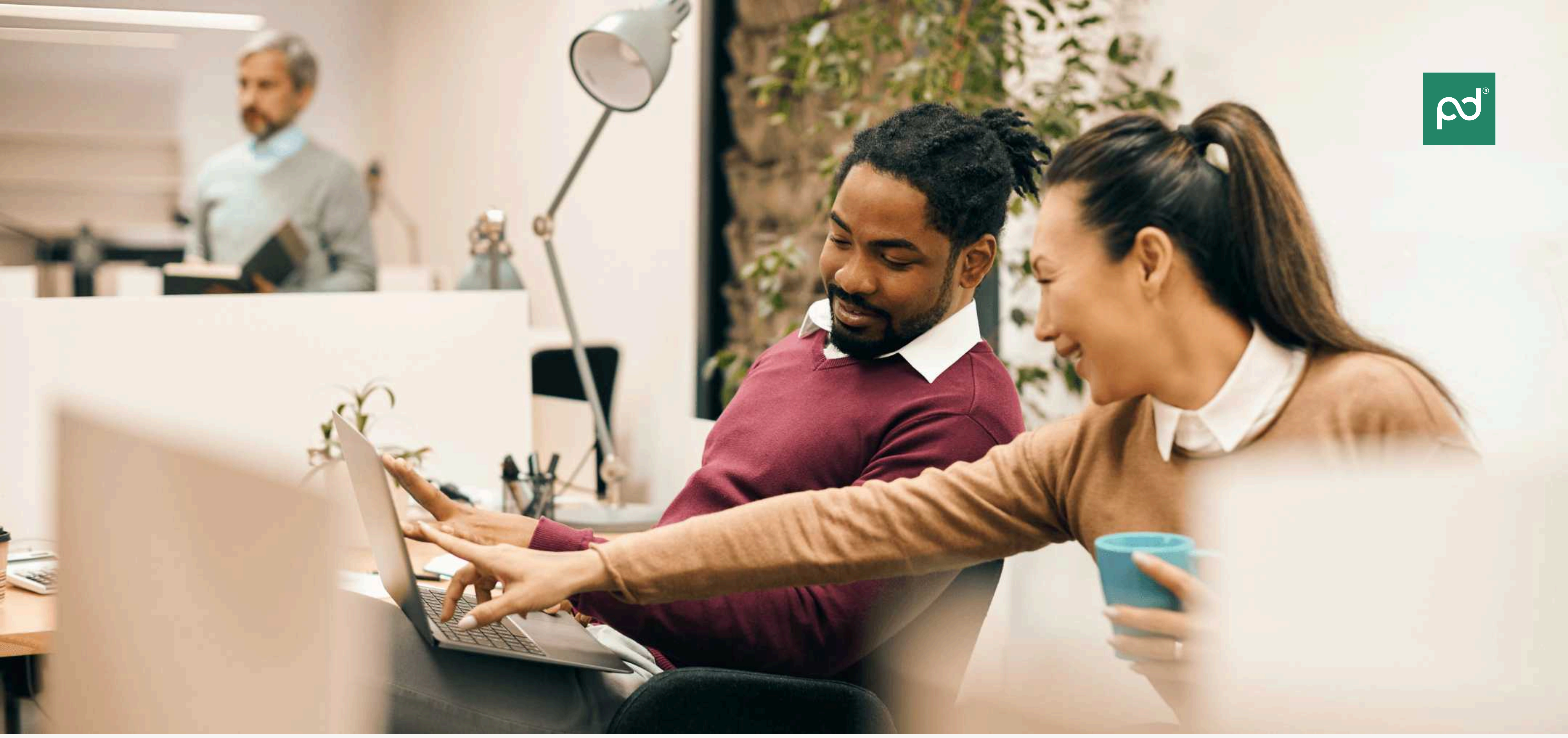
PandaDoc CPQ helped us unlock speed without sacrificing control, which is everything for a small RevOps team.



EMERSON MCEWAN

Head of Revenue Operations, HAAS Alert



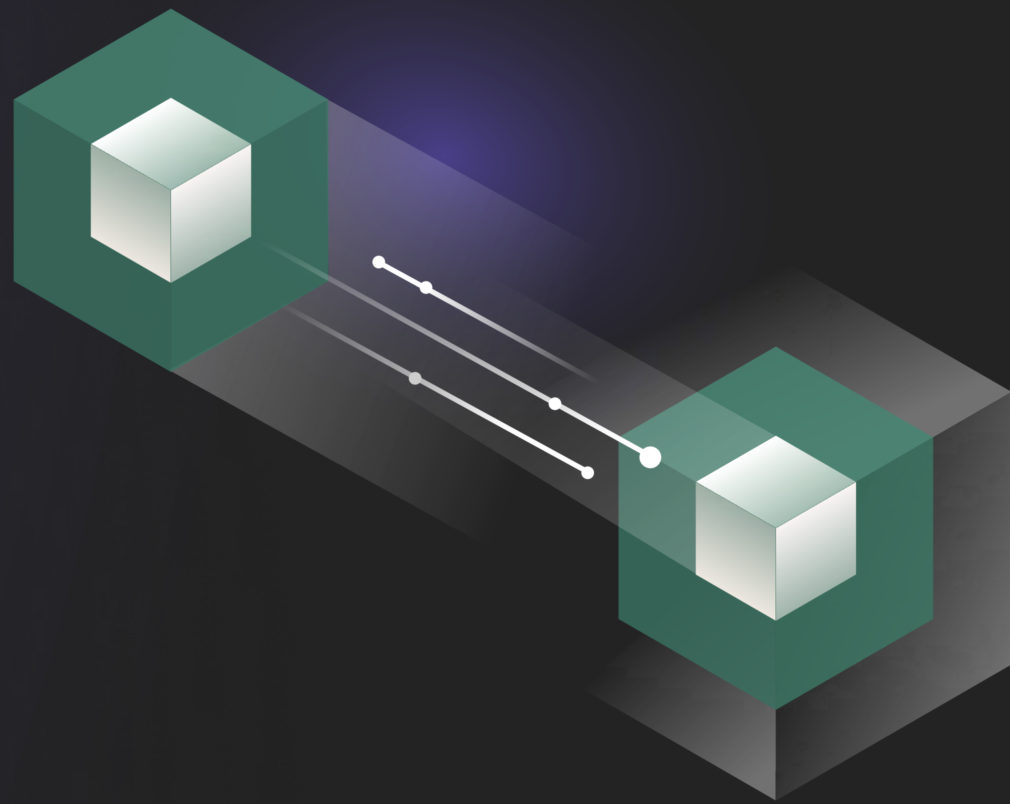
The new RevOps playbook: Integrated, intelligent, and invisible

RevOps success isn't about doing more. It's about removing what gets in the way.

The teams scaling fastest aren't layering on complexity. They're simplifying the path forward by designing workflows that support how deals actually work — across every team, tool, and stage of the customer journey.

THE BEST WORKFLOWS ARE:

INTEGRATED



Workflows should live where your team already works: your CRM, CPQ, CS platform, and collaboration tools.

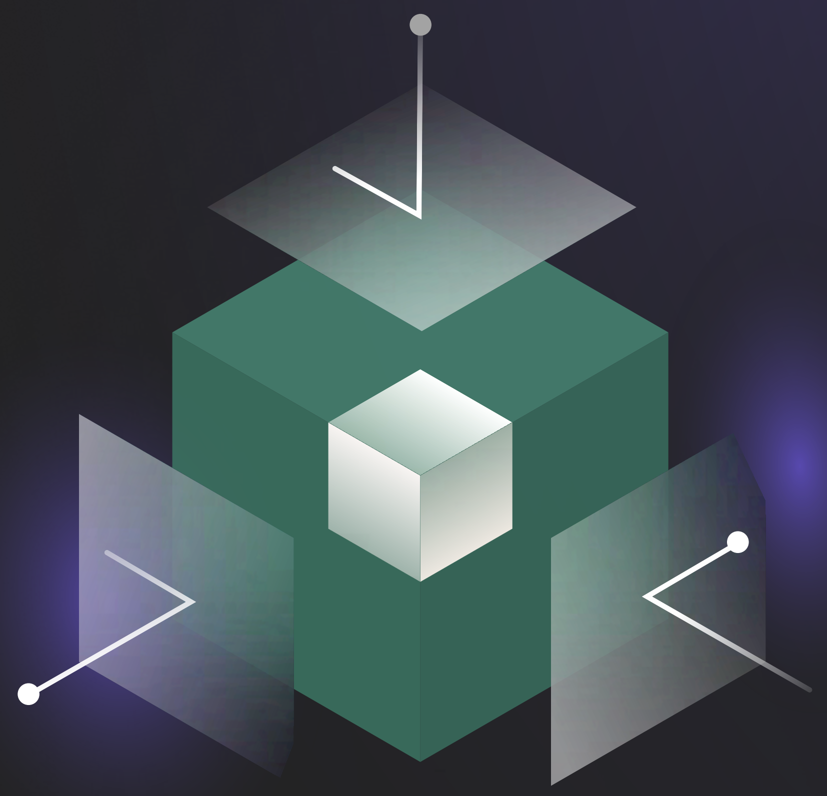
WHEN SYSTEMS ARE INTEGRATED:

- A qualified lead triggers routing, rep assignment, and SLA alerts.
- A signed contract kicks off onboarding with pre-assigned CS ownership.
- Renewal documents are auto-generated from historical contract data.
- Sales, CS, Finance, and Ops stay aligned without redundant status updates.

Integrated means fewer delays, fewer errors, and better cross-functional visibility.

THE BEST WORKFLOWS ARE:

INTELLIGENT



Smart workflows adapt to context.
Not everything should require
a manual decision.

WHEN WORKFLOWS ARE INTELLIGENT:

- ✅ Discounts above threshold automatically route to Finance.
- ✅ Quote templates adjust dynamically based on product mix or region.
- ✅ Multi-region onboarding plans generate based on contract metadata.
- ✅ Pipeline stages and forecasts update based on activity and rep actions.

It's not just automation. It's rules, logic, and conditions working together to move deals forward without unnecessary oversight.

THE BEST WORKFLOWS ARE:

INVISIBLE

The most powerful workflows don't add more steps. They make the existing ones feel frictionless.

WHEN WORKFLOWS ARE INVISIBLE:

- Reps generate, send, and track quotes without switching tools.
- CS gets what they need at the exact moment a contract is signed.
- Managers are fed a consistent stream of deal status updates.
- Everyone knows what's happening, without having to ask.

Invisible doesn't mean passive. It means your workflows are so well-designed, they stay out of the way — and keep revenue moving.

Final thought: If it feels slow, it probably is

Rethinking your revenue workflows isn't just about fixing inefficiencies. It's about building the foundation of a system that can scale with you. .

Today's effective RevOps teams aren't the ones adding more costly tools or simply patching process gaps. They're the ones willing to step back and design sales processes intentionally — from lead to renewal.

That's how quoting can get faster.
That's how handoffs can become seamless.
That's how pipelines can stay clean and customers can stay engaged.

Because when RevOps leads with workflow strategy, it stops being a support function, and starts becoming a growth engine.

Ready to start building smarter workflows?

Start with your quote-to-cash (QTC) process

QTC is the lifeline of any revenue organization — but it's often where hidden friction stalls new deals and customer onboarding. The CPQ (Configure, Price, Quote) component, in particular, plays a critical role in sales velocity, margin control, and customer experience.

If your quoting and approval workflows still feel manual, inconsistent, or hard to track, that's a clear sign your CPQ process needs a rethink.

And, no, you don't need to overhaul everything — you just fix what's slowing you down the most. And PandaDoc can help.

NOT SURE IF CPQ IS RIGHT FOR YOUR TEAM?

Schedule a demo to learn how PandaDoc CPQ can help you design a powerful GTM organization that is integrated, intelligent, and invisible.

SCHEDULE A DEMO →

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