PandaDoc®

The ultimate time-savings playbook:

20 TIPS & TRICKS TO SAVE HOURS IN YOUR DAY

Introduction

Ever wonder how the 9-to-5 workweek started? Henry Ford **popularized it in the early 1900s** as a solution to benefit overworked laborers in the automobile industry. At the time, this made sense for labor workers who were used to 12-14 hour workdays.

Now, the way we work has changed, and since the 9-to-5 workday was standardized more than a century ago, it's safe to say that it could still use a bit of an update.

2020 pioneered this when remote working became the trend among companies worldwide. This was a huge change for the working individual.
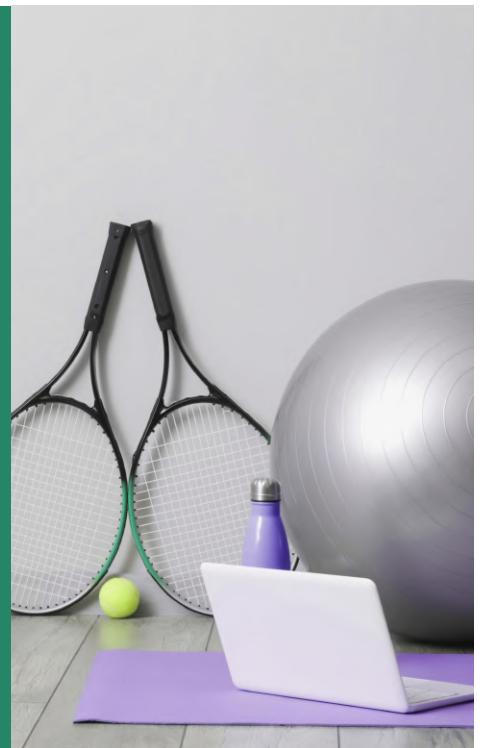
Working from home has its benefits. Based on a survey we, PandaDoc, ran with OnePoll with over 2,000 participants, here's what respondents said they'd like to continue doing with their new remote working lifestyle:

25%
Working out in the middle of the day

34.6%
Rolling out of bed 5 minutes before I sign on

Despite all of the flexibility remote working provides, it comes with a pretty significant side effect: **burnout.** The absence of clear lines between work and home means that not only can we work from anywhere, anytime, but we do **work from everywhere, all the time.**

With just a few clicks, technology has given us the luxury of instant communication, working from wherever we want, and seamlessly automating our workflows.

But rather than creating more time for being present, these luxuries have also made it easier to fall into the cycle of feeling like we are never doing enough and never have enough time.

Survey respondents said they faced the following challenges while working from home:
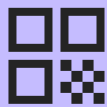
57%
Lack of adequate technology and software negatively impacts their productivity in their work-from-home environment
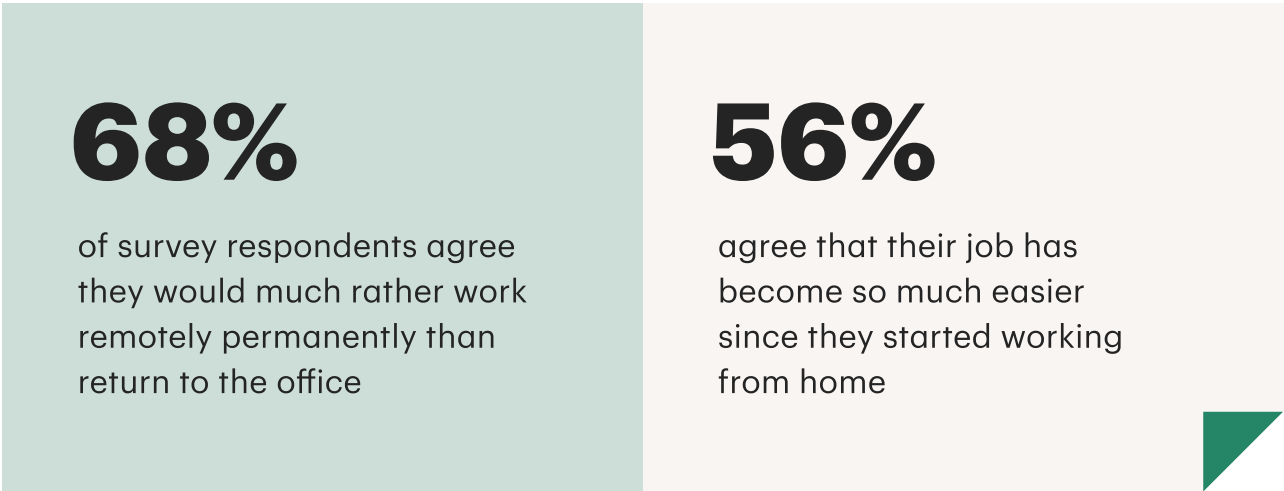
24%
Not having the equipment or software needed to do my job
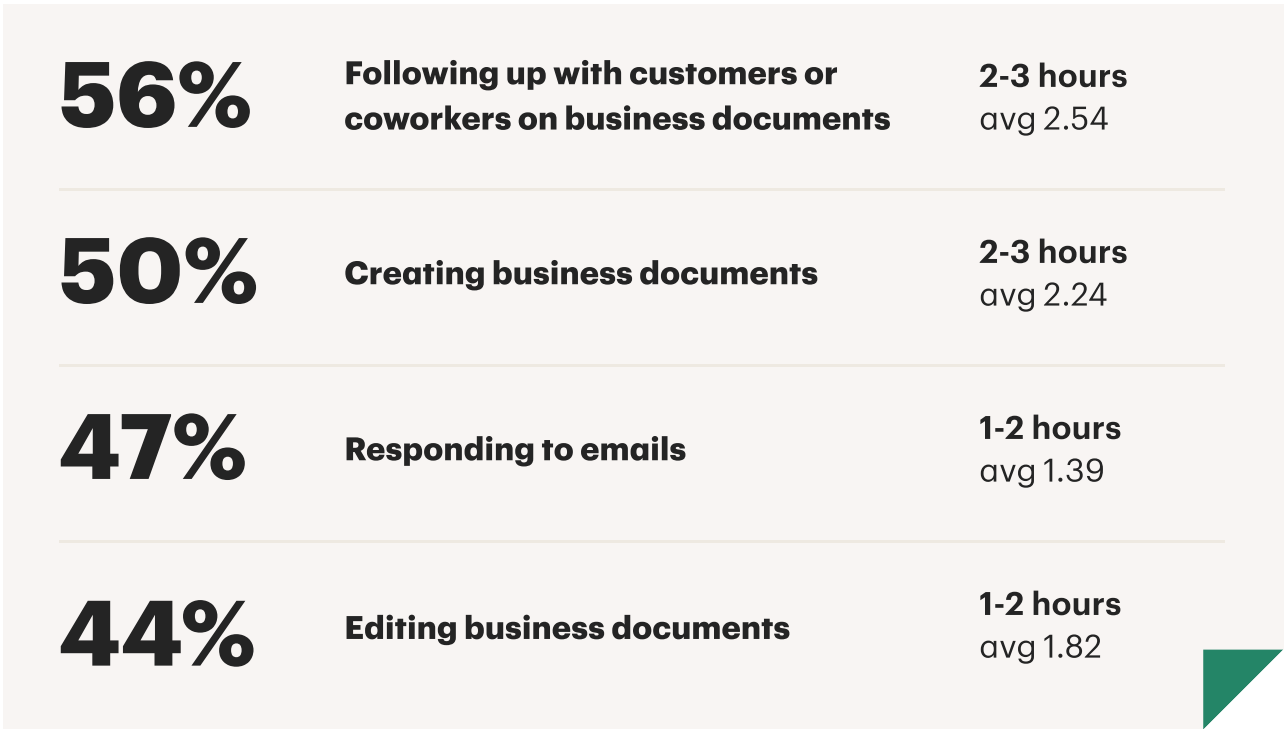
14%
Difficulty maintaining work/life balance

Whether we like it or not, one thing we know for sure is that remote work is here to stay.

68%

of survey respondents agree they would much rather work remotely permanently than return to the office

56%

agree that their job has become so much easier since they started working from home

Certainly, we all hope that the blurred lines between work and home life, and the resultant burnout, are not.

As we look ahead, **56% of companies** either go remote or stay remote, so we need to find better ways to manage our tasks, expectations, and communication boundaries. Without solid solutions, we may find ourselves stuck again in a place of low productivity and burnout. No one wants that.

Take a look at how our survey participants divvied up their workday:

56%	**Following up with customers or coworkers on business documents**	**2-3 hours** avg 2.54
50%	**Creating business documents**	**2-3 hours** avg 2.24
47%	**Responding to emails**	**1-2 hours** avg 1.39
44%	**Editing business documents**	**1-2 hours** avg 1.82

There's little room for creativity and, therefore, much room for improvement. We need to find a way to save time on tedious day-to-day tasks and fill that time with more constructive business solutions.

But saving time is only half the battle.

Saving time also requires energy, focus, and, ironically, time. To ensure the juice is worth the squeeze, don't forget to ask yourself the second half of this very important question: **What do I want to do with all the time I'm saving?**

Humans have a funny habit of needing to fill free time (just look at the **average hours per day spent doom-scrolling**), so make sure you're filling it with the right things to avoid just watching your time be robbed by more tasks and to-dos.

While we can't tell you how to spend your saved time — that's one you'll have to think about — we can give you a few tried-and-true tips, tools, and techniques to save hours in your day.

TAKE BACK
YOUR TIME

Taking back your time is a continuous process. A good place to start is to create systems so this gnawing feeling doesn't constantly plague your brain that you're behind, missing something, or late.

Here are a few ideas to get you started:

Set some ground rules

Flexible working hours are a great benefit to offer your team. Unfortunately, without clear communication, they can lead to disjointed availability, confusion, and stress.

Take the time to set some ground rules regarding expected hours of availability. When your team knows when their coworkers are available, they can come in ready to focus, get work done, and collaborate without wasting time figuring out who is available and when.

Establish working hours

Just because you may not be working in a typical office environment with set working hours doesn't mean you won't benefit by implementing some kind of structure to your day.

With everyone working flexible hours and potentially across a variety of time zones, you can end up receiving emails and Slacks around the clock. To keep your inbox — and sanity! — In check, establish your hours of availability, when you'll be on and offline, and when you will and won't be able to respond.

"Even when working from home, I have a 'commute'. Get up, get ready, take the dogs for a walk, eat breakfast, and sit down to work. Scheduling out your day does wonders for your to-do list and mindset. I also love a handwritten, cross-stuff-off list. Something about the satisfaction of getting stuff done helps encourage me to save even more time. With the time I save, I can spend more time with family and friends, exercise, and enjoy brewery and winery visits."

Bethany Fagan, Head of Content Marketing, PandaDoc

Make time to rest

Somehow, shifting to remote work resulted in more meetings. And with that came schedules that look like this:
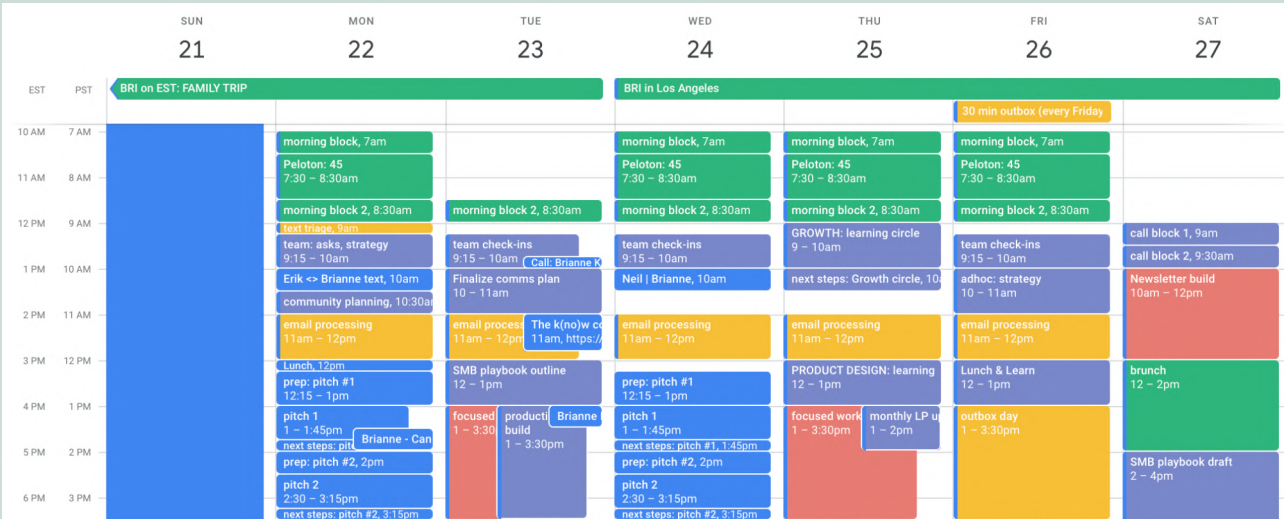
Working like that doesn't even leave enough free time to drink water, eat, or use the restroom! Let alone give you time to think creatively or get work done. Block off time in your calendar to stretch between meetings, take short breaks, go for a walk, or pet your dog.

> "Simply put, humans are not wired to be constantly wired."
>
> **Cal Newport**, Author of Deep Work: Rules for Focused Success in a Distracted World

Automate everything

Save time on tedious, repetitive tasks with tools that work in the background to help get your work done while you sleep, get exercise, or walk your dog.

There are endless options, including **Monday.com**, **Make**, or **Zapier**, that are designed to automate tedious tasks so you can focus on more important things. Take advantage.

Check out these **20 Sales process automations** to help save you even more time.

Templates, templates, and more templates

Maybe you're the kind of person who really enjoys doing the same work over and over again, rewriting the same email to hundreds, if not thousands, of people. If you are, we won't judge you.
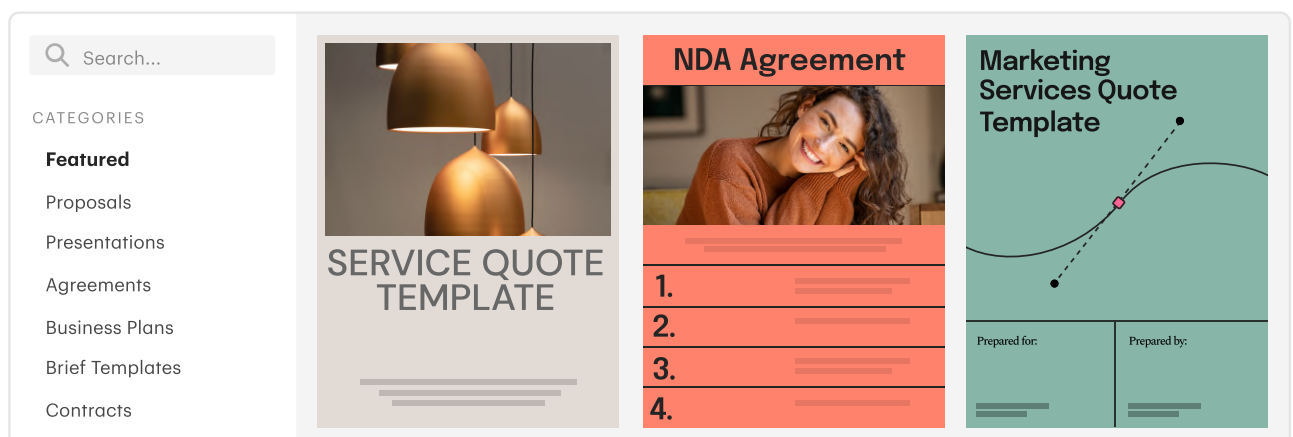
"Creating templates is such a time saver! Once I have taken the time to craft a great email, I will save that email as a template that I can use over and over. I give them all a specific title so I can easily grab the template I need each time. The same holds true for creating any kind of template; giving dedicated time to make sure my document looks just right should not be wasted! My day is **very** busy! Using templates helps me to work efficiently and then move on immediately to other tasks."

Lori Nolen, Customer Success Manager, PandaDoc

Schedule focus time

On average, 3 hours every day is **wasted on meaningless distractions**. The solution? Focus time. You may be wondering what exactly focus time is, and yes, it's time to focus, but it's also so much more than that. Even when we think we're focusing, we're usually not. This is mostly because we're still available through the typical means of communication — Slack, email, phone — and are constantly interrupted by endless messages.

Scheduling focus time involves blocking off your calendar, signing out of Slack and email, and muting your phone. Better yet, hide your phone far, far away. By limiting other distractions, you can complete tasks more quickly.

"Less mental clutter means more mental resources available for deep thinking."

Cal Newport, Author of Deep Work: Rules for Focused Success in a Distracted World

Make time to stay connected

For all the flexibility and freedom remote work offers, it can sometimes feel a bit isolating. Too many meetings are the enemy of productivity, but too little can be detrimental to a team's connectedness and cohesion.

It's important to schedule time for face-to-face communication with colleagues, especially when working with a team distributed across the globe. Bonus points if these meetings ban conversations about work!

Plan your next day

Logging on to work can be daunting. You're still half asleep, the caffeine hasn't kicked in yet, and you're bombarded with Slacks and emails competing for your attention. With so much to get done, you might end up wasting time figuring out where you should start.

> "I find structure really helpful. The final thing I do before shutting my laptop at the end of the workday is spend a couple of minutes setting priority tasks for the following day (and each Friday for the following week). Clustering meetings and social chats help me set aside banks of time to work on writing and editing projects. Deep focus is crucial, so I often mute my phone and switch off the green light in Slack. Then I leave all the screens behind and go hiking, hang with friends, eat donuts, and drive around the continent."
>
> **Charles Hodgkins**, Product Content Manager / Senior Copywriter, PandaDoc

Planning your day the night before can help eliminate the analysis paralysis that sets in early in the workday. Figuring out which tasks you need to get done and writing them down in a to-do list or blocking off your calendar can help you start your day clear-headed, calm, and focused.
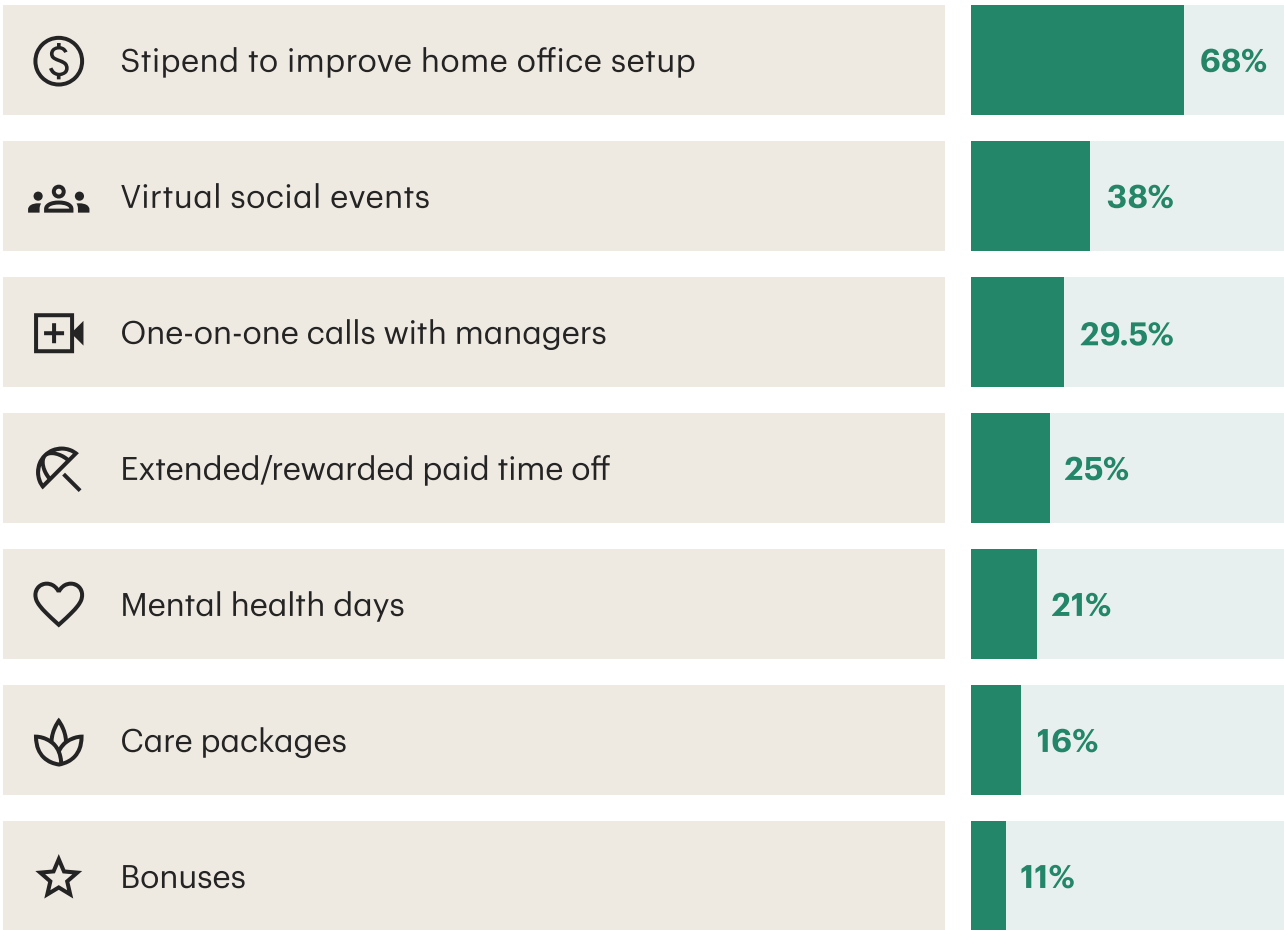
Prioritize your mental health

Burnout is no joke, posing significant consequences to both your work life and your personal life. So, unless you like watching the days pass by as you feel overworked, overstressed, and underslept, prioritize your mental health.

Making room for self-care, leisure, hobbies, and time with loved ones is critical to avoiding burnout and coming back to work refreshed and energized. You may think that reading a book, taking a walk, or sitting in silence isn't "productive," but on the contrary — rest is work's partner, not its adversary.

The same goes for companies. Significant job insecurity has led to a **rise in empowered employees**, where things like flexibility, skill development, and empathy matter more than ever. Don't overlook the benefits that come with investing in your team's mental health.

P.S. The companies who adapted best already have…

Our survey respondents cited the following ways their companies offered support to improve the employee work-from-home experience:

$ Stipend to improve home office setup	**68%**
Virtual social events	**38%**
One-on-one calls with managers	**29.5%**
Extended/rewarded paid time off	**25%**
Mental health days	**21%**
Care packages	**16%**
Bonuses	**11%**

TIME-SAVING TOOLS

78% of survey respondents state that adopting new software makes working from home easier. But there are a ton of tools out there to choose from. Thankfully, we'll break it down with some of our faves.

Lavender

Want to increase the volume of your sales email output without sacrificing quality or time? If your answer is yes (and why wouldn't it be?), then you need Lavender.

Think of Lavender as your sales email secret weapon. It helps you write your sales emails faster, and better, and double your reply rates — in half the time.

Must-have features

✓ **Next best-action alerts**

  Lavender recommends the next best action to take to increase your chances of getting a positive reply.

✓ **Prospect and company research**

  Gives you the inside scoop on your prospect at the click of a button.

Make

Sometimes, the work we need to get done involves many steps that most automation platforms just can't handle. Not Make. Make allows you to build complex workflows in less time, enabling you to design a limitless sequence of automation.

Make work work for you with Make Functions, letting you customize complex automation based on your unique needs. You can even splice and dice automations, creating separate workflows from the same starting point.

Sounds confusing? Make keeps this complexity easy to understand with their **workflow visualization**, so you can see every step of your automation and adjust (or admire) accordingly.

Handy-dandy features

✓ **Automatic error handling**

The last place you want something going wrong is your automated workflow. Thankfully, Make has built-in functionality that lets you set up automated course corrections in case something goes awry.

✓ **Limitless customization and automation with PandaDoc and Make**

Connect PandaDoc to any of your Make automations to help build non-linear workflows that do exactly what you need them to do and when.

Clockwise

Save time by focusing on what matters most: your work, not managing your calendar.

Clockwise is your personal, time-saving assistant that makes sure your time is protected. Free up uninterrupted blocks of time so you can focus, automatically reschedule conflicting meetings, and keep your coworkers informed of your working hours. Clockwise will even decline and reschedule conflicting meetings so nothing gets in the way of the quiet time needed to do deep work.

All-important features

✓ **Automatically book no-meeting days**

Clockwise for Teams lets you automatically book no-meeting days for your entire team, so everyone can have uninterrupted time to get work done.

✓ **Automated focus time**

Set your target goal for uninterrupted focus time and Clockwise will automatically find and block off time in your calendar to protect it.

"I'm addicted to the 3-3-3 method for time management by Oliver Burkeman. The rules are super simple & I love that the author acknowledges that this might not work for everyone, in which case they suggest "make up your own rule"!

- "Spend three hours on my most important current project, having defined some kind of specific goal for the progress I aim to make on it that day"

- "Complete three shorter tasks, usually urgent to-dos or 'sticky' tasks I've been avoiding, usually just a few minutes each (I count calls and meetings here too)"

- "Dedicate time to three 'maintenance activities,' things that need my daily attention in order to keep life running smoothly"

Carving out dedicated focus time for my core projects has been a game changer. I can think more clearly and find that it's easier to really get into the flow of my work."

Sally Weiss, Manager, Sales Enablement, PandaDoc

Reclaim

Remember all that talk about burnout? Well, it turns out that back-to-back meetings and Zoom fatigue are **major contributing factors.**

Reclaim is a must-have tool for automatically scheduling buffer time between meetings so you can decompress, get some water, and collect your thoughts between calls. You can thank us later.

Indispensable features

✓ **Defend your downtime, travel time, and routines**

Set the amount of time needed for tasks and habits you need to do on a regular basis. Then, tell Reclaim how strongly you want to defend this time, and Reclaim won't let anything get in the way.

✓ **Automatically decline meetings with custom messages**

Reclaim takes protecting your time seriously. If there's time you want to be blocked off, Reclaim will automatically decline conflicting meeting invitations with a message you can customize.

Canva

It's no secret Canva offers some of the best and most diverse design templates around. You can save tons of time creating stunning designs by choosing from Canva's templates or from its simple drag-and-drop design elements.

Even better? Real-time team collaboration directly within designs helps keep feedback organized and easy to find.

Noteworthy features

✓ **Social media scheduling**

Create, schedule, and publish social posts directly within Canva. For social media managers, this is the ultimate time-saver.

✓ **Give your business documents a much-needed facelift**

Canva integrates with PandaDoc to keep your brand team happy and help you design swoon-worthy documents with ease. It's so easy even a marketer could do it.

Chili Piper

Unless you've been living under a rock, you've probably heard of the game-changing sales tool, Chili Piper.

Chili Piper isn't just a revolutionary sales tool, though.

Beyond enabling teams to increase revenue and show rates, Chili Piper is also a time-saving machine, helping teams book more meetings, save hours of back-and-forth scheduling nonsense, and send automated meeting reminders to guests. Say goodbye to manual tasks and follow-ups.

Stand-out features

✓ **Multiple meeting types**

Not every meeting is the same, and your calendar should reflect this. Chili Piper gives your prospects meeting options based on their needs. You can even set up a custom welcome message to send your guests based on the meeting type.

✓ **Buffer time**

Even sales teams get burned out when they have hours and hours of back-to-back meetings. Chili Piper solves that, too. Buffer time gives you a chance to prep, review notes, or take a break.

monday.com

Efficiency should be effortless. monday.com has developed a visually stunning task management platform that allows you to automate your entire workflow with minimal effort.

How's that for saving time?

With tons of templates to choose from, multiple ways to visualize your upcoming projects, and endless customizable automations, staying on top of your time has never been easier.

Favorite features

✓ **Custom dashboards**

Each team has its own unique needs. monday.com's custom dashboards allow you to keep a bird's eye view across the projects and tasks that matter most.

✓ **Mirrored boards**

Need to keep track of the status of relational tasks across projects? monday.com keeps it simple with mirrored boards, giving you visibility into the status of various tasks all from a single board.

Salesmate

Salesmate makes it easy to convert more prospects into customers in less time. Outreach emails, texts, calls, and follow-ups are all personalized and, better yet, automated.

Smart Queue allows you to bunch your top activities for the day while Salesmate sends them out one by one. Email templates and automated activity reminders help get messages to prospects out the door fast — without compromising personalization or efficiency.

Outstanding features

✓ **A 360-degree view of the customer**

Salesmate automatically connects dots across all customer touchpoints, helping your team have valuable conversations, plus access to updated context about each customer, prospect, and deal.

✓ **Share key documents with prospects directly from Salesmate**

PandaDoc and Salesmate have teamed up to help you save even more time by allowing you to get key sales docs out the door fast, directly from your Salesmate CRM.

Otter

With remote work, more people are working from varied time zones. Distributed teams bring scheduling conflicts that sometimes mean not all necessary team members will be able to attend meetings. Designating a note-taker during meetings or recapping details for your colleague aren't great solutions, as both can result in missed important details and/or key points getting lost along the way.

Enter Otter. Otter records your Zoom meetings, complete with automated meeting notes, summary keywords, highlights, photos, and full audio transcripts to keep everyone aligned and informed, whether or not they were able to attend the meeting.

Dazzling features

✓ **Global search**

Somehow, remote work has led to a **12.9% increase in meetings** per employee per day. Keeping track of meeting notes is virtually impossible. Otter's global search lets you search all recordings to find what you're looking for in seconds.
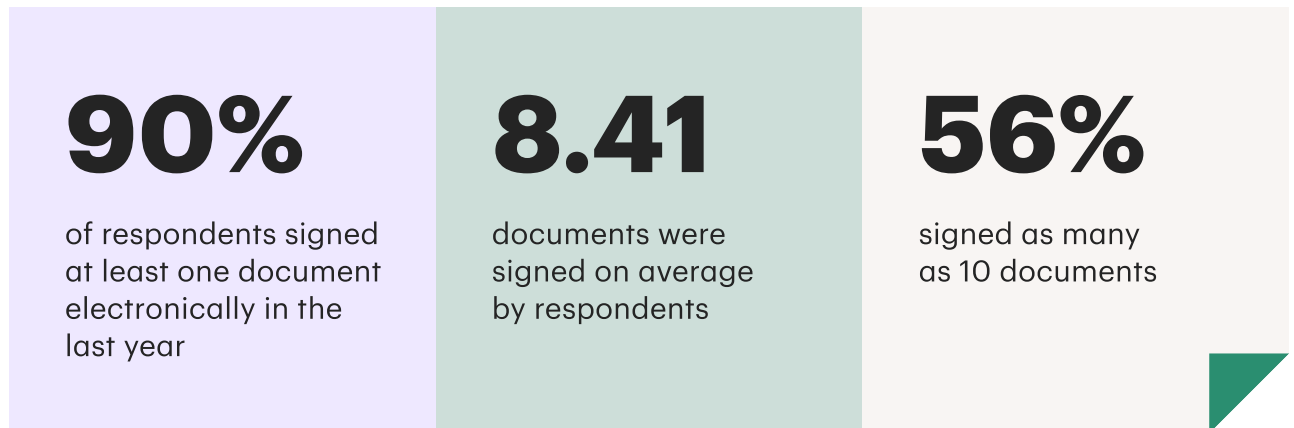
✓ **Team collaboration**

Even team members who missed the meeting can still be involved. Otter's collaboration features make it easy for everyone to ask questions, make comments, and add ideas directly within the notes.

PandaDoc

Okay, shameless plug here. But we practice what we preach and think we're pretty awesome. **So do our 50,000+ customers.**

Documents are a part of our lives in both personal and professional scenarios. Just check out this stat from our survey:

90%
of respondents signed at least one document electronically in the last year

8.41
documents were signed on average by respondents

56%
signed as many as 10 documents

Creating, sending, signing, managing, and tracking documents takes a lot of time. Don't give your time away to yesterday's document processes. We promise there's a better way.
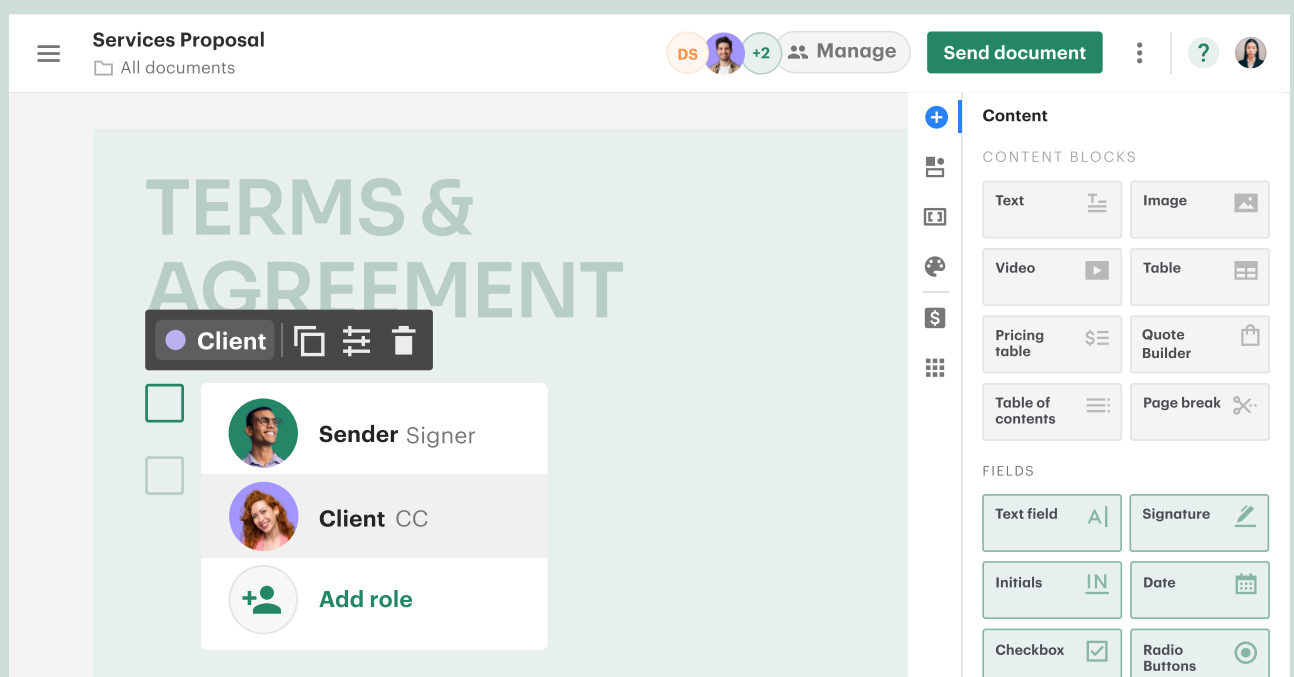
Documents are at the center of business operations. Whether it's an NDA, onboarding a new client, or proposals you're sending, you're interacting with documents every day. Check out how frequently your peers interacted with business documents and how digital documents made their work life so much easier:

70%

said software products that enable document sharing, collaboration, and workflow automation are necessary to help maintain employee productivity

45%

said the adoption of electronic signatures has helped them save time during the workday, closely followed by digital document process **(39%)** and workflow management tools **(35%)**

56%

said the ability to sign business documents electronically has made a significant impact on their business and/or job

PandaDoc provides an all-in-one document workflow automation platform that helps fast-scaling teams accelerate the ability to create, manage, and sign digital documents — proposals, quotes, contracts, and more.

A lot more.

With over 450 done-for-you templates to choose from, oodles of integrations, and a robust training center, document nirvana is just a click away.

Our new, fully redesigned user interface makes document creation and collaboration simple and safe. Collect files easily and securely, and make sure that only those invited can see your docs by protecting them with a recipient access code. You can also share items in your content library between workspaces, so you don't have to recreate the same assets over and over again.

PandaDoc is more fun with friends. Easily and quickly invite internal or external collaborators to your workspace with an **invite link.**

Make sure document control stays in the most trusted hands with the ability to **transfer document ownership.** Whether a colleague unexpectedly quits or you simply need access to an important document quickly, we've got your back. All you have to do is re-assign the documents between responsible team members (or to yourself) in just one click.

Bonus feature: any other settings or permissions attached to the document also migrate to the new owner — so you can get back to work with little or no delay.

Features that wow

✓ **Suggest edits**

Shorten your time-to-close with a streamlined and transparent contract negotiation process. Our Suggest Edits feature helps contract negotiations go smoothly by identifying sticking points that may prevent your deals from closing directly within your docs.

✓ **CPQ**

Our CPQ feature helps you control and manage what your team sells by pre-configuring the exact products and services they'll need to take to market. Enjoy the robust new design, easy-to-use builder to quickly create quotes and volume-based pricing!

It's time to take the work out of your document workflow. **Learn more** about **PandaDoc** or **book a demo.**

"Saved messages in PandaDoc or saved email templates are huge time-savers and keep me from constantly writing the same thing over and over.

Also, template and content library items can plug in to help us avoid recreating content and give us a base for the documents that are created.

For CSMs, the Salesforce integration with our automation using smart tokens is a huge time saver, as it pulls in data from our reporting tools — so everything is in one place.

It used to take 30+ mins to get a deck together. Now it takes 5.

Finally, inline comments prevent getting a thousand Slack messages about one doc, and save time with back-and-forth communication!"

Jenna Tinney, Customer Success Team Lead, PandaDoc

TAKE CONTROL OF YOUR FUTURE WORK-LIFE BALANCE

Between rising rates of remote work and burnout, the concept of work-life balance has become a familiar one. Yet, despite understanding the meaning and importance, we still struggle to find time for both. Most often, it's not a lack of time that prevents us from harmonizing our work and home lives but a misunderstanding of how to manage it.

We might be looking for a solution through the wrong lens. Maybe the secret to saving time and achieving work-life balance isn't about tirelessly trying to fit ourselves into an outdated box but instead reimagining how we work as the way we work evolves. Reimagining a work style that's as flexible, versatile, and dynamic as this new normal.

The software we use on a daily basis needs to adapt with us. We can't save time and build efficient processes when we're hemmed in by yesterday's tech that thinks linearly while we work dynamically.

Even with the best of tools, saving time is an ever-changing, never-ending process. Who needs the added struggle of having to constantly change the way you work just to fit within the parameters of an outdated tool? That sounds like a waste of time. Definitely not what we're going for.

Updating the way you work only to forget to update the tools you work with will leave you even more frustrated, stressed, left behind, and still wondering where all your time went. Yep, right back at square one. Only, this time it might even be a little worse. Don't be that person.

Start implementing some of the tools and tips we've included in this guide, and watch how much time you save. Your workflow might even get a whole lot easier. Especially if you're using PandaDoc.