

HOW PandaDoc

GENERATED 44 DEMO REQUESTS IN 1 WEEK WITH METADATA

THE COMPANY

PandaDoc is a fast-growing SaaS firm that closes more deals with proposal software. Sales teams of any size and from any industry can create, send, track, and eSign beautiful proposals and quotes. Marketing loves the pre-approved templates and sales reps love that they can easily track any proposal status in real-time. Their customers frequently report a 65% decrease in doc creation time and a 28% increase in close rate.

THE PROBLEM

To continue on their growth path, PandaDoc knew they needed to educate target customers on how the PandaDoc platform differed from single-purpose electronic signature solutions. At the same time, they needed to devise a way to provide their Sales team with a steady flow of leads that were ready to close.

THE SOLUTION

PandaDoc turned to the Metadata automatic account-based advertising platform to scale their demand generation efforts for target accounts. Metadata delivers the right content to target contacts on the social and programmatic ad channels where they live, before they search for it. Metadata achieves this with a simple 3-step **“pretargeting”** process:

1. Generating custom audiences that fit PandaDoc’s ideal customer profile
2. Targeting those contacts with massively-scaled multivariate ad experiments.
3. Monitoring which ads lead to new or influenced opportunities, and automatically optimizing ads to generate the most pipeline.

“ Metadata gives me peace of mind that we’re educating the market and generating Sales-ready leads at a scale that just wouldn’t be possible using our in-house resources. ”

- Paul Bussenius, Dir. of Demand Generation, PandaDoc

Metadata optimizes every permutation of collateral, audience, creative, channel at scale, with zero human intervention. PandaDoc has thus freed up many hours or even days per week that their marketing team can now use to focus on value added tasks, versus the manual UTM tagging, data enrichment, and A/B testing tasks that consumed them before implementing the Metadata platform.

THE RESULTS

Metadata’s efforts on behalf of PandaDoc are paying off. PandaDoc completed over 80 experiments and generated 44 new demo requests in one week. They were also able to open new account expansion opportunities at a Fortune 500 electronics brand through their targeted content programs driven by Metadata.

Overall, PandaDoc has generated over 800 new leads, and increased lead-to-conversion rates significantly, generating or influencing over 70 opportunities for Sales that met their ideal customer profile.

BUSINESS RESULTS

44

demo requests in first week

87

experiments completed

+11%

lead-to-opportunity rate

72

new/influenced opportunities