



Growth Sprint Review

November 21th, 2025



Agenda

-
- Retain & Grow: APOLLO
 - NUX: COOK
 - NUX: ROCKET
 - Monetization: MON ENABLEMENT
 - Monetization: MOONCAKE
 - Monetization: SPIRIT
 - Monetization: SAMURAI

Growth - Retain & Grow

We are back 😎🚀💥

Growth | ACQUISITION

Team PLG



Sprint goal: ✓ Achieved

Release Expired → Free Experiment

- ✓ Launched Expired → Free Experiment
- ✓ Launched Adoption for Public Templates Experiment
- ✓ Preparing First Free eSign experience for the release
- ✓ Updated Editor Upsell
- ✓ Update Yellow Sticky header
- ✓ Launched Dashboard Nudges Project
- ⌚ Level up templates lister
- ⌚ Change Free eSign welcome dialog





Next sprint focus:

Release FakeDoor Test Experiment

- ➡ SOON Fakedoor test with document packages
- ➡ SOON New welcome dialog
- ➡ SOON Update template lister
- ➡ SOON Consistent doc creation flow





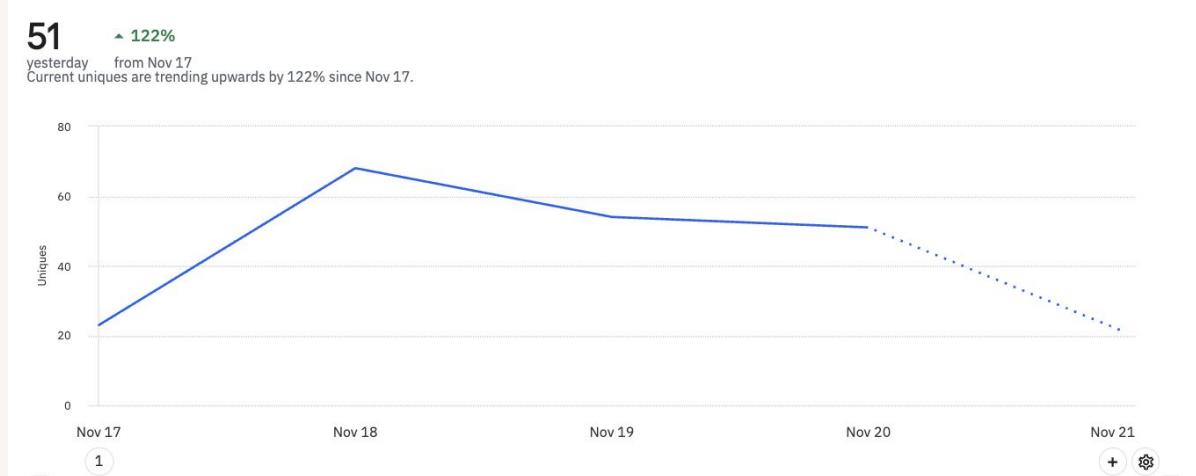
Demo topic: Nudges & Expired (365d+) → Free



Dashboard Nudges

Goal: Grow Template Adoption on the Free eSign

**50+ Free eSign users
interact with the
nudges daily**

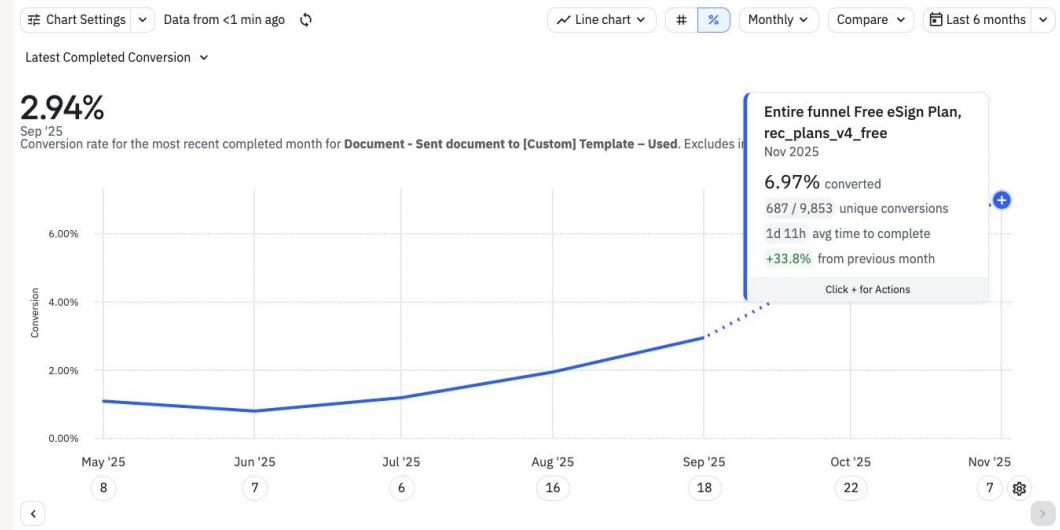




Dashboard Nudges

Goal: Grow Template Adoption on the Free eSign

6.97% of doc-senders used templates this month





Dashboard Nudges

Goal: Grow Template Adoption on the Free eSign

Managed from the
Inside in a few clicks!



Thanks to
Anna & Alisa!

Dev Tools

I need help I have feedback Anna Werigo Logout

+ Add Nudge

Order	Text	Button Text	CTA	Link	Language	Display Condition	Created Date
3	Use reminders to prompt recipients to c...	Learn more	Link	https://support.pandadoc.com/en/...	American English (en-US)	Always	Mon, 10 Nov 2025 14:02:23 GMT
2	Invite your team to PandaDoc for free	Invite users	Invite	-	American English (en-US)	No Team Members	Mon, 10 Nov 2025 14:01:14 GMT
1	Save time with reusable templates – cre...	Create template	Create Template	-	American English (en-US)	No Templates	Mon, 10 Nov 2025 14:00:03 GMT





Growth – Retain & Grow

Apollo

Sprint goal: Achieved

Spike the new help consolidation work

- Added more contextual awareness to the knowledge agent, it now knows the entry point page!
- Spiked **& started** the integration of Video tutorials
- Spiked the integration of Intercom support into chat
- Foundation work continued on reliability with vector store tracing and logging.

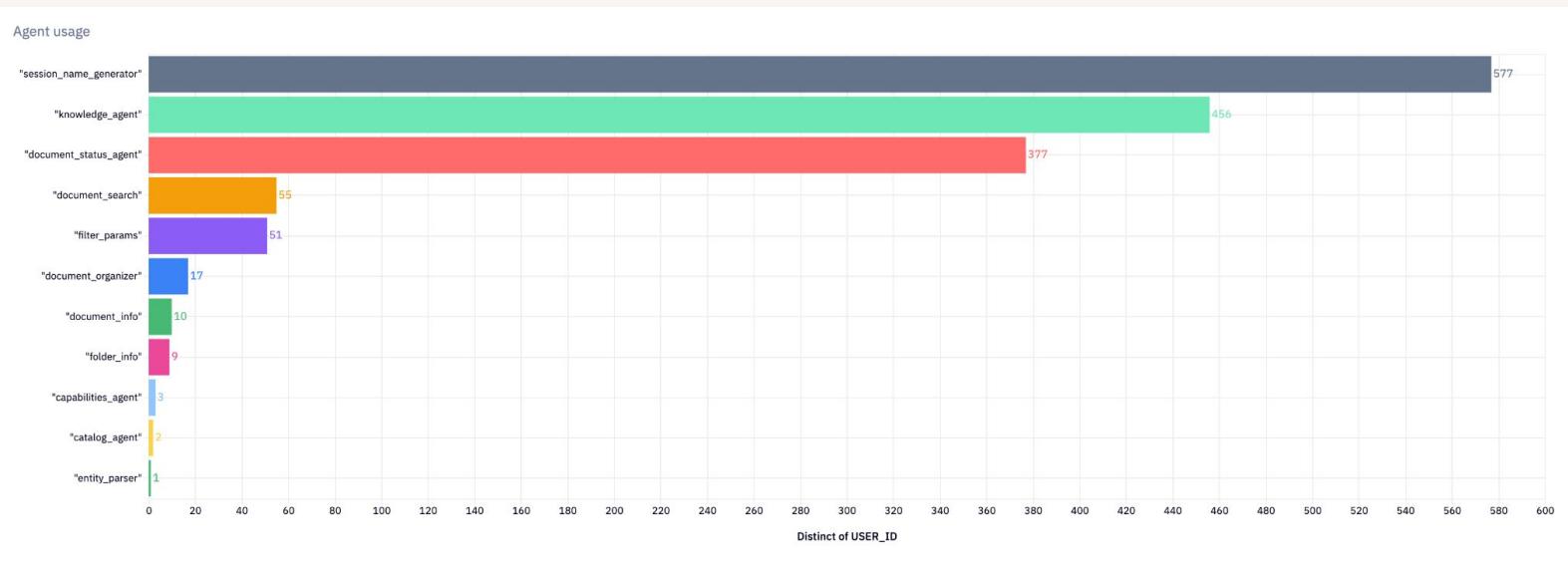
Walk me through sending my document

You're already on the document page, so start from the steps below to send your document in PandaDoc:

1. Click the **Send** button, usually located at the top right of the document page.
2. In the send dialog, review the recipient list and add or edit recipients as needed.
3. Customize the message subject and body if you want to personalize the email



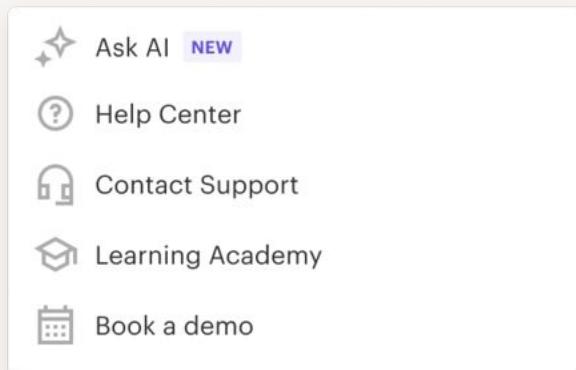
Knowledge agent usage



Next sprint focus:

Declutter the help menu & start integrating video tutorials into chat

- Monday the contextual KA goes live
- Declutter help, we're removing
 - Status
 - Cookies
 - Updates
 - Ideas
- Adding Ask AI entry point to help
- Continue the integration of video tutorials into chat





Growth – NUX

Cook



Sprint goal: Achieved

Build pre-onboarding as a standalone service

- ✓ Created and configured stand alone application for pre-onboarding, it will be injected into the flow next sprint
- ✓ Merged all elements required for the Onboarding back-office
- 🚀 Started working on a research plan and prototype to run usability tests for the workflows flows





Next sprint focus

Merge standalone service with the current flow

- Merge pre-onboarding new standalone service with the current flow
- Finish Back Office tech work on BE side
- Finalize UX Research (interviews and report)





Growth – NUX

Rocket

Sprint goal: Partially achieved

Release signup phone number removal

- **AI Sales Bot:** We are still pending the required security and legal procedures. Also the vision for this experiment has also changed, and we will integrate the AI bot into the product using an iframe.
- **AI Analytics Events Migration POC:** Created a prompt that analyzes legacy event information and forwards it to the next prompt.
- **Phone field removal:** We've finalized the task for removing the field and fixing the tests. Since this information is required in HubSpot, the RevOps team is considering adding this step on the Chili Piper side. Once they complete their part, our release will be unblocked
- **Google Drive cleanup** in scope of Org and user domain gwpv-core decomposition
- **Bug fix:** Timeouts between mspv-onboarding & gwpv-core adjusted to account for bigger branding images.



Next sprint focus:

Remove the Company Name field from the sign-up flow

- We'll need to implement the phone number field for in-app demo booking from the product side
- Show the AI Sales Bot inside PD application using the new iframe model and properly tie user to agent session
- Roll out a small A/B test for the Book a Demo after Pre-Onboarding flow
- Continue progress on the AI Analytics Events migration POC

Useful links: [PRD](#), [PRD2](#)





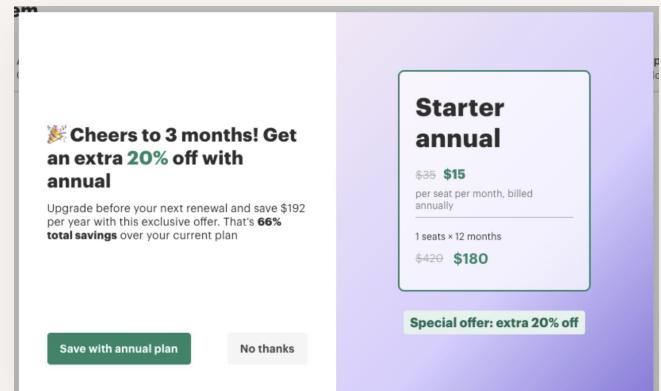
Growth – Monetization

Mon Enablement
Mooncake
Samurai
Spirit

Sprint goal: Achieved

M2A - Launch 3M offer experiment and A/B test on trial accounts

- 3M banner and dialog offer
- [Experiment] Annual plan savings for Trial accounts
- Rolled out Permissions for members to invite members to starter plan
- Rolled out M2A Banner for business accounts
-  Data exploration to identify segments for churn prevention experiment
-  Ms Teams vulnerability fix



Useful links: [PRD](#)



Next sprint focus:

Prepare churn prevention experiment based on Doc drop signal

- Complete designs for new experiment
- Continue to explore data for experiment for segmentation
- Experiments clean up
- Kick off spikes for Q1





Demo topics:

3M banner dialog + banner

Highlight annual plan savings for Trial accounts



Sprint goal: Achieved

Release Plan API to unblock Dynamic Plan Retrieval for Billing Support Tool (US & EU)

- ✓ split mspy-product-checkout into multiple roles: checkout (US only) and catalog (US & EU)
- ✓ product-catalog **started serving plans setup in EU** – to be used by downstream services as *single source of truth*
- ✓ encountered a **EU incident** (fortunately false positive) → requested improvements to deploy flow from Devexp
- ✓ planned **on-site alignment** session with Billing team on our roadmap for Monetization, Billing and Product Catalog domains
- ✓ reworked handling of frontend analytics → universal and more versatile tooling
- ✓ drastically improved our frontend toolkit so **adding new upsells** becomes now a matter of minutes
- ✓ RFC: unified subscription provider configuration proposal – first feedback iteration
- ✓ RFC: product-catalog internationalization – first feedback iteration





Next sprint focus

Unify monetization product config between catalog & gwpy-billing & Recurly

- Alignment with Billing team: synergize Billing Strategy 2026 with Mon Enablement aspirations and plans
- Sync 2026 vision with Product team: key enablement needs & data-driven monetization prospects
- Migrate custom upsell configs to the config builder
- Finish upsell folders refactoring
- Rock the Hackathon!

Useful links: [PRD](#), [PRD2](#)





Demo: null





Sprint goal: Achieved

Experiment to suggest Renewals based relevant template types – prepare BE for testing

Also, we have:

- ✓ **[Experiment]** Launched experiment on removing CTAs from cards in Extensions
- ✓ **[Experiment]** Launched experiment on suggesting Workspaces on different template types
- ✓ Fixed upsell bugs and removes old splits

The screenshot shows the PDF platform's document management interface. On the left, there's a sidebar with navigation links like 'Recent', 'Starred', 'Shared with me', 'Trash', and 'Upcoming renewals'. The main area features a section titled 'Automatic alerts for every expiring agreement' with a sub-section for 'Renewal notifications'. Below this, there's a preview of an 'EMPLOYMENT AGREEMENT' document with sections for 'Upcoming renewals' and two entries: 'Employment Agreement' (by Jane Doe, renewing in 5 days) and 'NDA Agreement' (by John Doe, renewing in 13 days). At the bottom, there's a table listing several documents with columns for Title, Status, Value, and Created date.

Title	Status	Value	Created
Regular Agreement	Waiting for payment	\$0.00	Dec 20, 2023
Mortgage Proposal	Draft	\$10000.00	Mar 1, 2023
Conversion Rate Optimization Proposal Template	Completed	\$0.00	Jan 13, 2023

Figma on experiment





Next sprint focus:

Prepare for rollout experiment to suggest Renewals based relevant template types

Details:

- Finish development of the experiment
- Make exploratory testing and fix possible bugs





Demo topic:
No CTAs on cards in Extensions



Sprint goal: Achieved

Bug fixing and exploratory testing of the new API plan

- Bug fixing from previous testing ✓
- Second round of exploratory testing with Team Cubs ✓
 - All critical bugs are fixed barring some minor improvements
 - Release planned for next sprint when marketing entry points are ready
- Old split removals ✓

PandaDoc

Manage your subscription

Upgrade your plan, update your seat allotment, purchase an add-on, and more.

MOST POPULAR

API Developer
For core document management and e-sign.

From \$40
per month, Unlimited seats

Select plan

Key Features:

- ✓ 40 documents per month
- ✓ Unlimited test documents
- ✓ Template and Content Library access
- ✓ Webhooks and Webhook Logs
- ✓ Audit Trail
- ✓ Monitoring page

Enterprise
For complex document workflows.

Custom

Contact us

Everything in API Developer, plus:

- ✓ Volume based pricing
- ✓ Production API key
- ✓ SSO support and custom user roles
- ✓ Unlimited number of team workspaces
- ✓ Additional seats
- ✓ Custom branding

Welcome!!





Next sprint focus:

Kick-off work for personalized churn deflection offer on Starter plan

- ⌚ Kick-off work for personalized churn deflection offer on Starter
- ⌚ Spike into usage / volume based plans

Pay only for the documents you send

Our Launch plan ensures you never overpay. Start with the basics and easily add more documents as your needs change — perfect flexibility without paying an extra price.

Launch plan

\$40 \$15

per month base
+\$3 per additional document

Keep all the features you love:

- ✓ Unlimited seats
- ✓ Includes 5 document sends
- ✓ Additional documents charged at \$3 per document sent
- ✓ 5 ready to use Templates
- ✓ Legally binding eSignatures

Useful links: [PRD](#)





Demo topic:
Self-serve purchase of the API plan



Thank you!



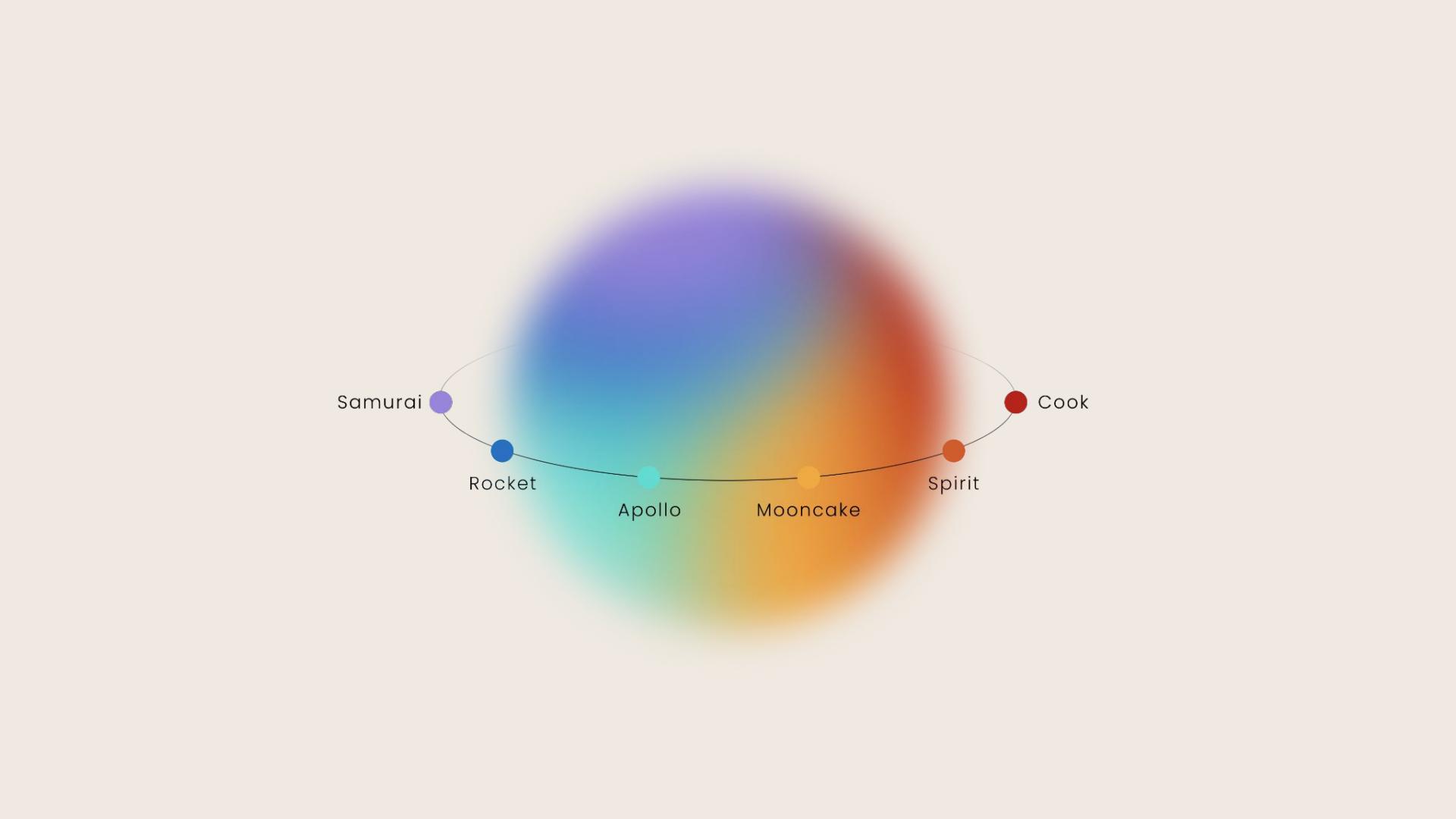
Template & Resources

SPRINT XXX



Growth Sprint Review

MONTH, YEAR



Samurai

Rocket

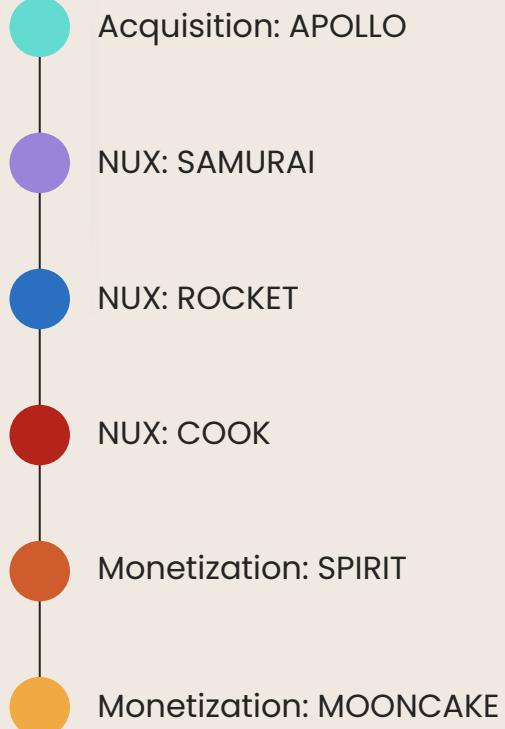
Apollo

Mooncake

Spirit

Cook

Agenda

- 
- A vertical timeline consisting of six colored circles connected by a vertical line. From top to bottom, the circles are teal, purple, blue, red, orange, and yellow. To the right of each circle is a text label describing a concept or strategy.
- Acquisition: APOLLO
 - NUX: SAMURAI
 - NUX: ROCKET
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Growth – Retain & Grow

Apollo

Sprint goal: Achieved

Fixed OAuth sign up when 2nd step of signup in preonboarding

- Fix OAuth sign up in preonboarding
- Technical tasks in preonboarding: unit tests coverage, backpack score, logging and so on.
- Chrome Extension decommission
- PDF Toolkit decommission
- Free Email Tracker for Gmail Decommission





Next sprint focus:

Summarise sprint goal in one line

Comments regarding next sprint focus, what outcome we plan to achieve, why we believe it'll help us to reach our goals

- Body of work planned

Useful links: IRD, research, metrics, etc.





Demo topic: Project title goes here

[Link to demo](#)





Growth – NUX

Cook
Rocket



Sprint goal: Achieved / Partially achieved / Not achieved

Summarise sprint goal in one line

- Body of work completed in Sprint
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- Body of work still in progress
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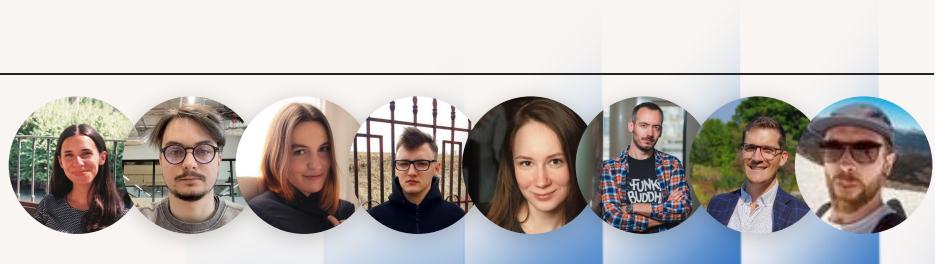
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[Link to demo](#)





Demo topic: Book a Demo screen





Growth – Monetization

Samurai
Spirit
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Demo topic: Project title goes here

[Link to demo](#)





Growth – NUX

Cook

Sprint goal: Achieved

Trial improvements for A/B test launch

Primary goal:

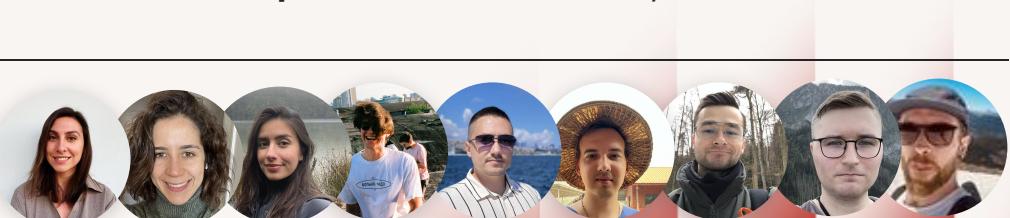
- Remove decoupling
- Remove trial extensions
- Launch A/B test

Stretch goals:

- Doc Creation Appcues relaunch (not a blocker)

New personalised trial experience

- **Background:** we removed changes at the top of the funnel (decoupling) to reassess the impact of the new trial experience, and decide whether to keep as is or change
- **Research:** has shown that personalisation might be more appropriate for automation-driven users, and less for quick e-signers who need a simplified experience
- **Expected results:** End of July

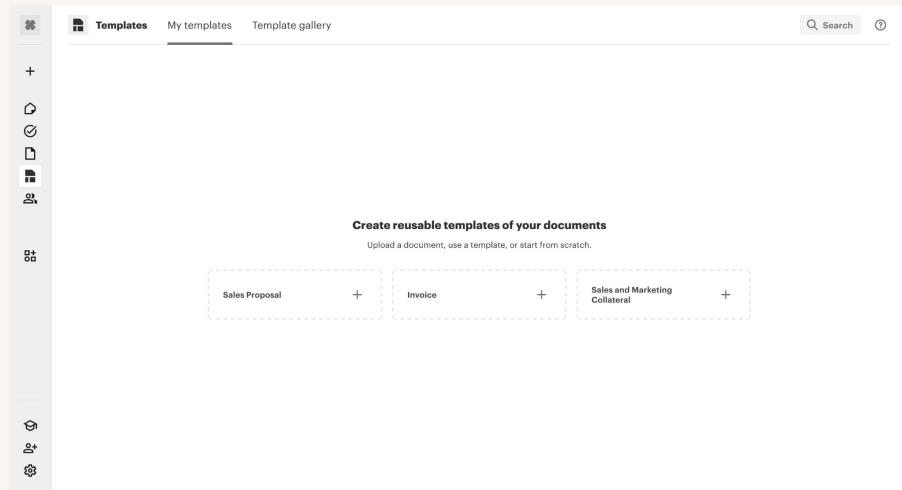


Next sprint focus:

Design sprint for template activation improvements

- List improvements targeting automation-driven users (*) based on research and new segmentation hypothesis
- Prioritize and iterate designs around template activation
- Refine one-pagers and PRDs so that we get ready for developing the first A/B test, "Empty states", inspired by Team Samurai.

(*) [Activation research](#) by Patricia



Pre-onboarding insights

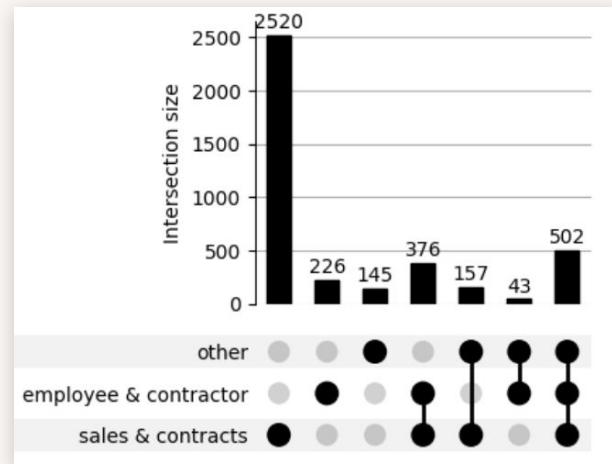
What do users select in the pre-onboarding survey?

We had a 95% survey completion rate. Some insights:

- 56% of accounts multiselect document types.
- 27% selected docs across multiple solutions (e.g., Sales and HR).
- 19% selected multiple tools.
- Multi-selecting docs/tools → higher CTP rate
- Cross-solution selection → higher activation rate

→ Survey completion behaviors can be reliable early signals of a user's intent and engagement.

Frequency of solution selection (w/ cross-solution selections)



By Sara Sabzikari
Link to analysis [here](#)





Thank you!