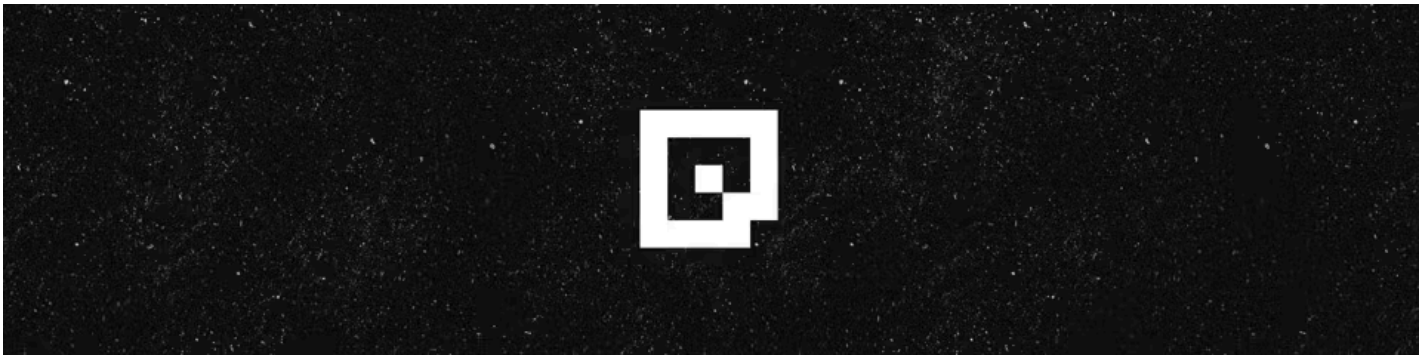
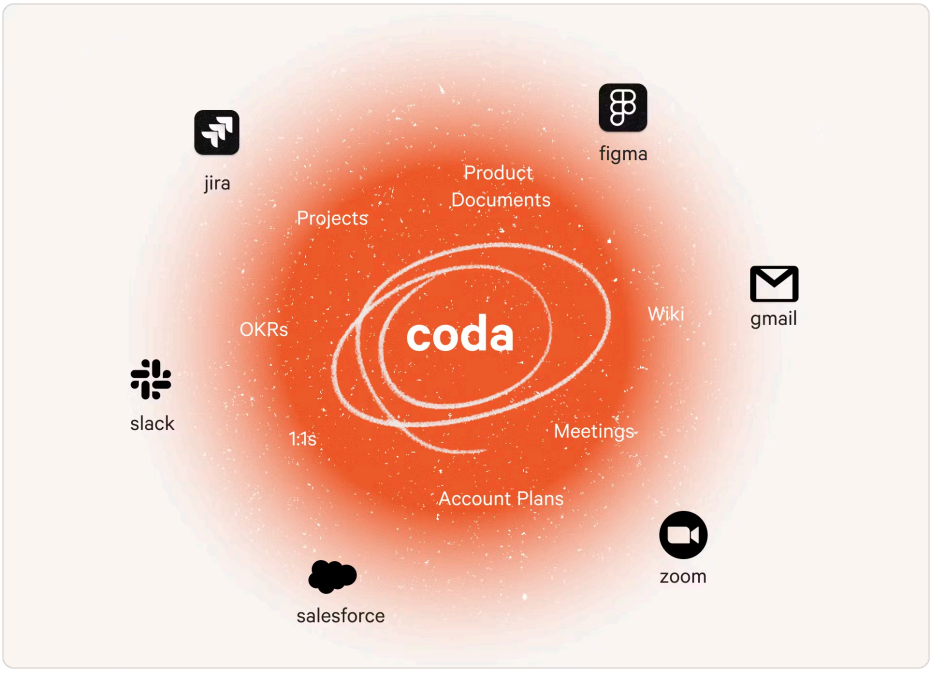


Solutions Studio

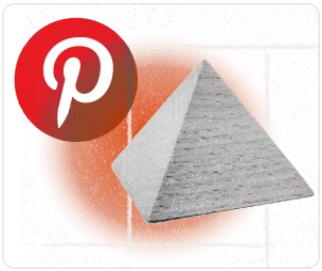
Architecting your Coda ecosystem



Our expert Solution Architects help you build your WorkOS — a work operating system that brings together business operations — within Coda so that your team can collaborate in one unified surface across words, data, and apps.

Together, we create unique ways to run the business, design rituals that help teams work, and transition your current tools and process to increase productivity and quality of work.

Success Stories



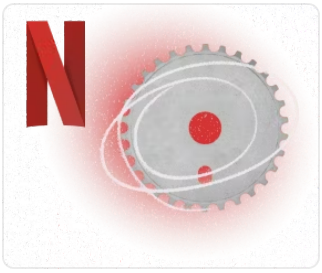
Pyramid OKRs

Pinterest is setting goals at scale, increasing productivity by $92k each quarterly planning cycle. Learn more

“We had a ton of fun partnering with Coda Solutions to co-design and roll out our OKRs.”

Naveen, SVP Product





Project Hub

Netflix is creating visibility across project work & aligning the Production Innovation organization. Learn more

“We co-created a solution that’s so aligned with Netflix’s culture of Freedom & Responsibility… it gives leadership exactly what they need while each team can run their own way.”

Camille, Manager, PM



How we work together

Each Coda deployment has a maker, or maybe a whole crew! Solution Architects bring speed, lift, expertise, and UX sense to the maker’s building journey so that they can successfully implement their unique ways of working in Coda.

Speed

Get something up and running fast.

You need a solution ASAP or “yesterday” — your dedicated Solution Architect will work with you to set goals and agile sprint milestones, that will have your team begin testing in weeks, not months. Our clients are decreasing their time to value by at least 3x.

Expertise

We’ve seen it all.

Coda Solution Architects design & develop a wide variety of solutions and researching best patterns with clients like Pinterest, Netflix, and Coinbase. You may have even seen some of their docs in the Gallery. We’ll infuse our know-how with your unique ways of working to create new systems.

Lift

"Building docs” is rarely part of a maker’s full-time job.

Solutions will join your team, guiding and making through design, building, and roll out. You are not alone.

Smooth user experience (UX)

Ensuring engaged editors.

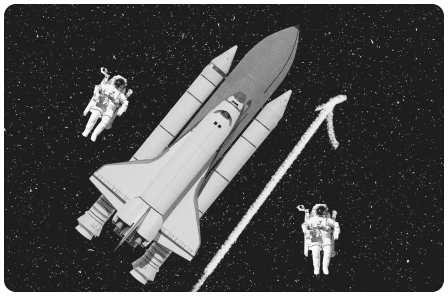
The ultimate ROI of your Coda investment lies in the doc(s) adoption — if no one is using it, it’s not making an impact. Think of Solution Architects as your part-time Product Manager: the flexibility of Coda allows us to simplify and strengthen your ways of working without losing the rituals that make your team unique. We deliver delightful user experiences that are sustained by help content, training guides, and live user workshop sessions.

Solution Packages

🚀 **Quickstart**

Transition

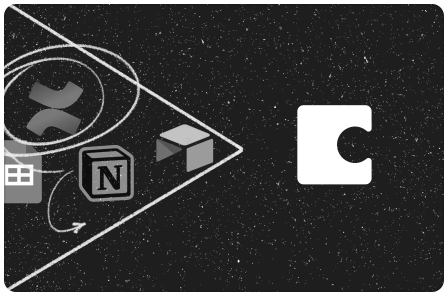
⚙ **Build an App**



For the maker wanting a guided doc launch.

We'll guide the maker with the flow, design, and structure of a doc, empowering the maker to utilize Coda's building blocks over this 4 week program.

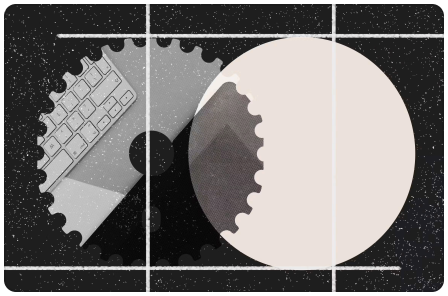
Learn more: Quickstart



For the team moving many tools to all in one place.

After gathering the words, data, and app workflows, we then bring it all into Coda and work with the maker to add new functionality into their workflow.

More on Transition



For the business creating a unique way of doing work.

We'll co-create a business application through our agile "pair building" approach, bringing a working operating system to the business.

Details: Build an App

FAQs

The Solutions Studio feels a lot like professional services or IT consulting, how is it similar / different?

Great question. This is the internal Coda consulting service division within Coda. What makes us different is that we are creating the solutions with you more deeply, prototyping and iterating with your team. We're here to share the best way — then roll up our sleeves with you to solve together. Somewhere between what you've described and an internal embedded developer group.

How much does it cost to work with you?

It depends on your needs and the Solution Package approach that you chose to solve your business challenges. After a brief discovery call, we can provide you a range for what level of investment we'd need from ya'll to engage in a project together. As we work together on the scope of our solution, we will get to a specific number. This process is fast and transparent.

If we pulled PMs, designers, and engineers from the Product team, couldn't we just do this internally and not have to hire you all?

Does the cost of doing that — both the resources invested but also the opportunity foregone of improving your product — make sense? We believe that your product team is better at building the products that make you unique in the market; Coda's Solution Studio team can co-create your internal products that run your team, because those are the types of products that we build.

Don't we have a better idea of how our own team runs to do it ourself?

You know how your team runs, but do you know how to translate it into a WorkOS with Coda? We bring the best practices of 100s of other teams infused into your own team's operations rather than the silo'ed view formed from years of internally being in the weeds. We can consult on the industry's POV and you bring your unique perspective.

I thought Coda was easy to use. It's just a doc right?

Coda is easy to use because it starts like any document surface: blinking cursor, paragraphs, bold/italics. When your ideas start evolving from a doc to systems to run the teams — tables become relational databases, pages becoming information hierarchies, buttons that trigger automations, and plugging into the rest of your tech stack — that's when working with Solution Architects can accelerate your ROI.

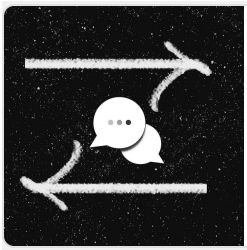
Aren't their other things that can accelerate our value of the platform like help articles and webinars?

Absolutely! We have some of the best DIY learning resources: help docs, community, webinars, YouTube. We use a lot of these to get our main makers ramped up as fast as possible so we can "pair build" together, spending less time teaching the building blocks and more time making solutions.

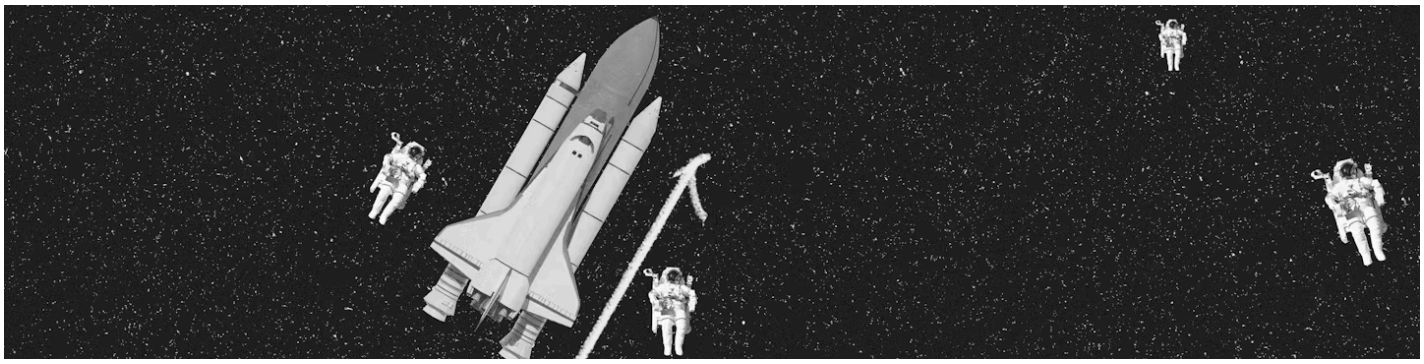
From our maker profile



How to build web applications without code
It's easier than ever to create digital applications like websites or project trackers, without writing a single line of code #nocode.
coda.io



Request Stream
The flexible request tracker for your growing business.
coda.io



Quickstart

You've got a vision for a doc that will simplify and strengthen the way you and your teams work. Whether you've found a template in our gallery that you want to make your own, or you want to fast-track your journey to building something brand new, Coda's Solution Architects can partner with you to get it right on the first pass.

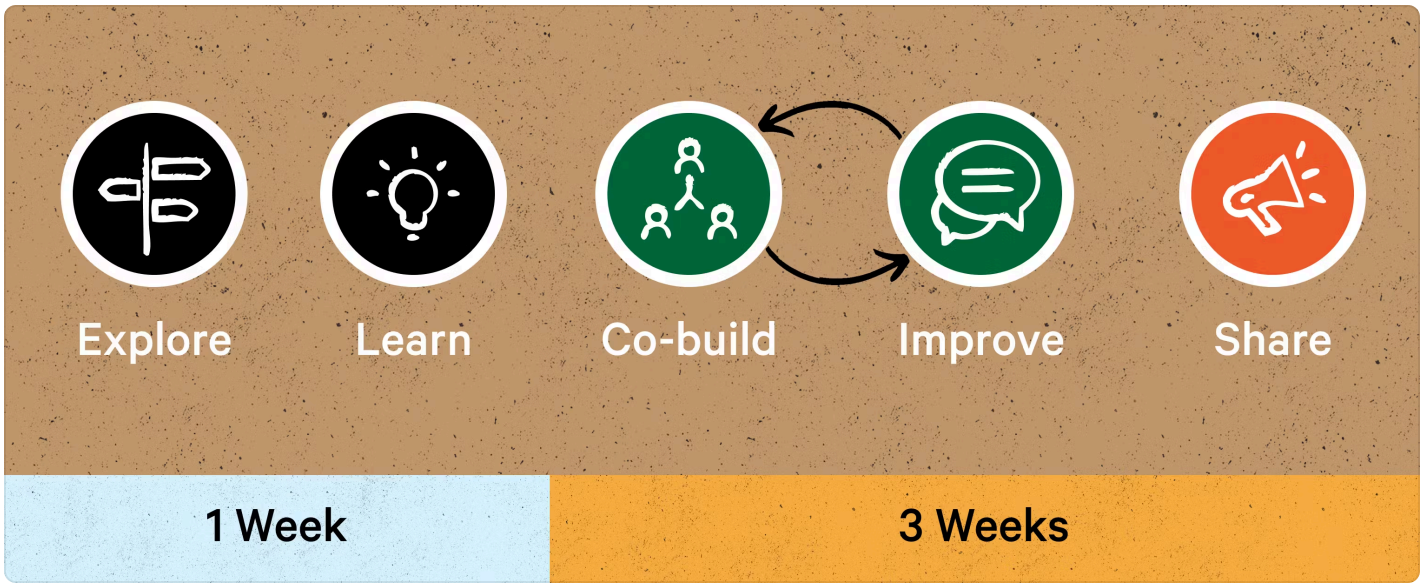
How we do it

We'll co-build with you over 4 weeks, giving you a tailored learning plan so that you can make quick progress on your business need, and draw on our depth of expertise to help you build a doc that amplifies your best practices.

Investment

$5,000 one-time cost

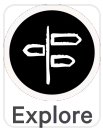
Up to 2 Makers



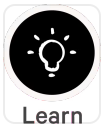
Want to take the next step?

Book a discovery call

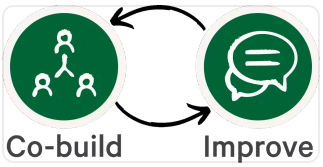
The Building Blocks of a Quickstart



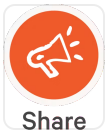
One of the best ways to build quickly is to build with clarity, identifying the most impactful solution from the start. Coda's expert Makers have built docs across industries and roles, and our first step in a **Quickstart** is a robust discovery to clarify the needs driving your doc and to uncover how we can build the best user experience for the people who will use it everyday.



Based on your goal for the 4 weeks we'll shortcut your learning process, immediately identifying the Coda building blocks that you need to learn to deliver the most value. No dead-ends, and no wasted time. We'll give you resources to study, once-per-week Learning sessions, and fast-response support to keep you moving forward every day.

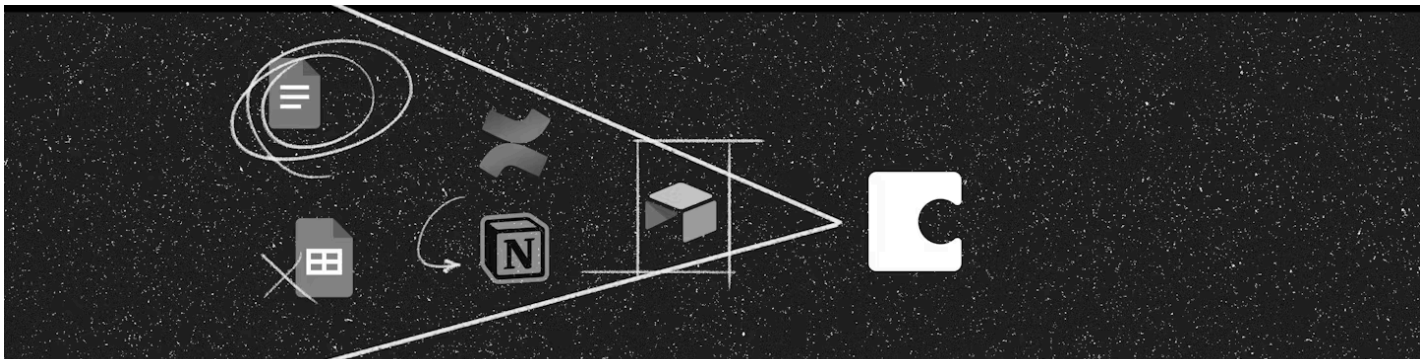


With **Quickstart** you're the star Maker. In weekly Co-building sessions we'll actively coach you to build the core components of your doc, ensuring that you're not only confident to explain the doc to others, but to carry your new skills into future projects. Each week we'll build it better, adding new workflows and using rapid cycles of feedback to show you Coda patterns you might not have imagined were possible.



The result of your efforts in **Quickstart** are twofold:

1. You will have a key workflow in Coda that you can proudly share, with the polish and UX to draw in key team members, and the flexibility to evolve with ongoing feedback.
2. Equally important, you will emerge confident in your ability to build in Coda for your future needs and the broader success of your team.



Transition

You've written documentation, built spreadsheets, or tailored apps that run your team. As you consider shifting to new tools and ways of working, it's vitally important that any switch safeguards your data and doesn't distract from key business activities.

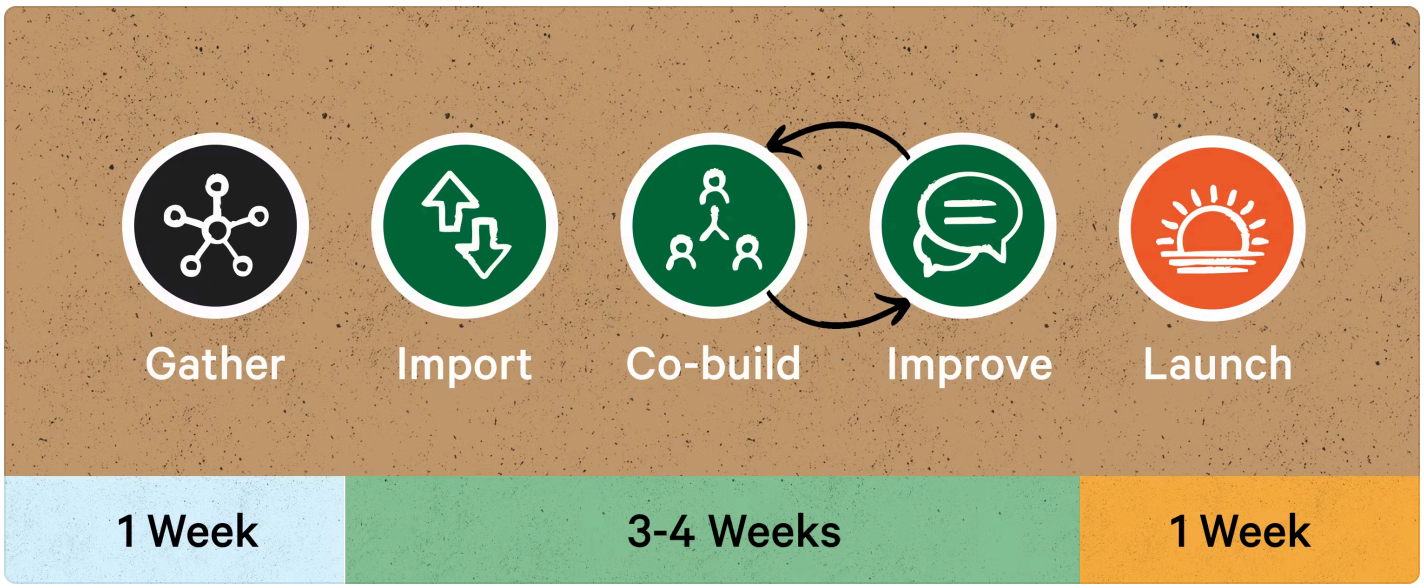
Coda's Transition offering pairs you with a Solutions Architect (SA) who will deeply engage with your pre-existing tools, migrate your data into Coda, and co-build a doc that maintains the best aspects of your prior solution and unlocks new opportunities with Coda's building blocks.

How we do it

We'll share best practices to clean and prioritize your data which, once finalized, we will migrate into Coda. Together, we'll re-build what you previously found useful and co-build brand new features that simplify and enhance your ways of working.

Investment

We'll learn more about your unique transition needs and provide a price.



Want to take the next step?

Book a discovery call

The Building Blocks of a Transition

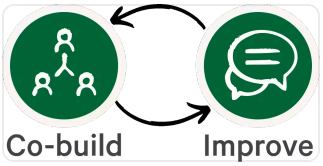


Coda's **Transition** starts with detailed discovery of the most valued features of your previous tools, allowing us to map out where Coda should feel familiar to your team and where we can delight them with new building blocks that make their work easier.

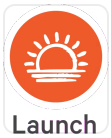
Moving to Coda is also an opportunity to re-prioritize and potentially clean the data you collect for a fresh start that will scale with your team. Coda's expert Makers will provide you with guidance for data cleaning and deep product knowledge to assist as you prioritize your migration.



With your data mapped and your priorities clarified, Coda experts will implement an end-to-end migration of your data, ensuring the integrity and accessibility of your data in your new Coda doc.



After a secure migration, our primary focus is on collaborative building of your new doc. Through cycles of building and feedback, we ensure your doc feels familiar to your team and valuable to each team member. Our Solution Architects have dual-expertise in building docs that scale with growth and in designing user experiences that make Coda accessible and intuitive for users.



The best doc still needs a plan to gain buy-in from broader stakeholders and to allow you and your team to easily onboard team members over time. We take a multi-pronged approach to supporting your launch according to your preferences, with interactive live-training for key users and detailed knowledge-bases for people to self-teach within the doc. In either case, we guarantee rapid response times during your doc roll-out to smooth any unexpected requests.



Build an App

Every team has their own unique needs and the cookie cutter solutions of today's SaaS market just don't work for you. If you're considering building a tool with your own resources and engineers or hacking a spreadsheet to act like an app, you're in the right place.

Coda's Solutions Architects guide the discovery of your challenges and needs, and you'll co-create a solution that evolves your process. Through the project, you'll become an expert Coda maker, empowering you to scale the solution and create new tools as other business needs come across your plate.

Impact

> "Out-of-the-box software had already decided how we should operate... Through exploring our rituals - like how to update teams on progress and review goals - **we got to design the right tool, not adapt our ways to a tool."**

Anne Purves

Director of Design Operations @ Pinterest



Investment

We'll learn more about your unique application needs and provide a price and maker effort estimate.

How we work together



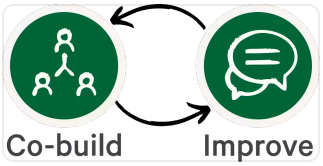
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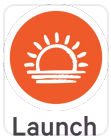
The Building Blocks of a Build an App



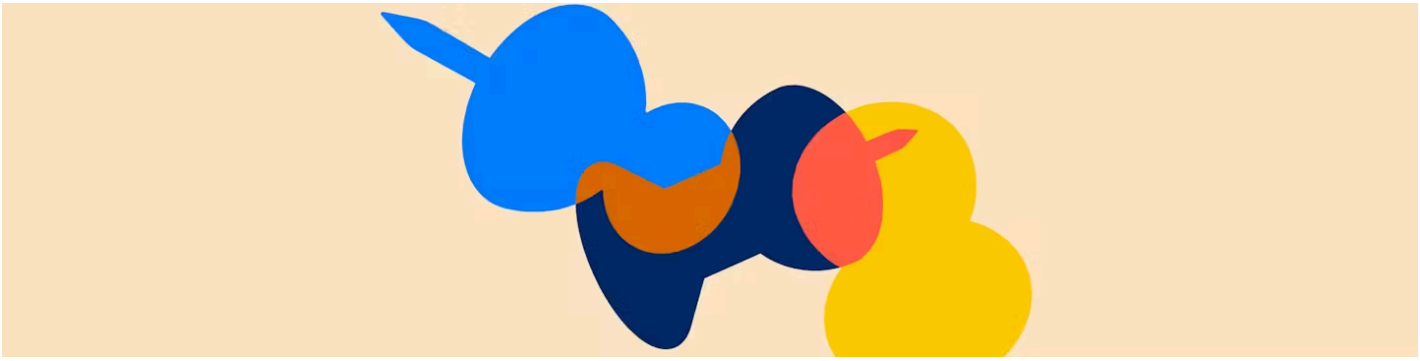
In **Build-an-App** we're we're building a tailored Doc that simplifies your most impactful workflows. Our first step is a robust discovery to surface your team's varied needs and to distill them into a shared vision of what we're building together. This prioritization gives us clear measures of success and helps us to confirm that your team loves the most important building blocks of your solution, as early as possible.



Driven by a shared vision of your most important needs, we co-build your doc from the ground up. In every case we establish clear cycles of co-building and feedback, so that your primary Makers are intimately familiar with the building blocks of your Doc and so that your users can shape the inevitable improvements that we identify along the way. Our Solutions Architects are holistic Doc Makers, building for both an intuitive user experience and for performance as your doc grows in scope and usage.



With a Doc that is tailored to your team's best ways of working, we know that communicating that value is essential in busy work environments. We'll tailor demos to gain buy-in from skeptical stakeholders and create evergreen resources (in the form of videos, checklists, and any other documentation you need) to allow you and your team to easily onboard new team members over time. We guarantee rapid response times during your doc roll-out to smooth any unexpected requests.



Pinterest's Pyramid OKRs

How to avoid silos when setting goals at scale.

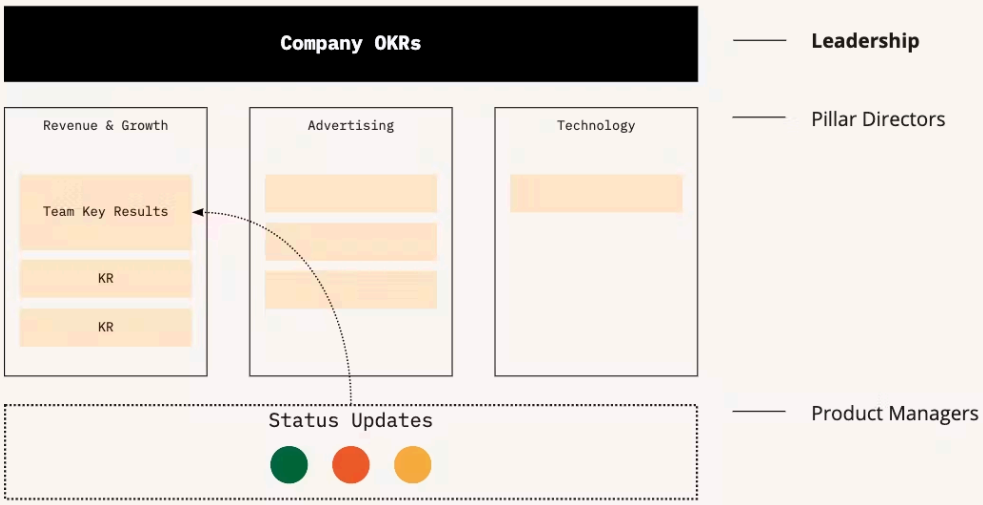
Pinterest is a leading social media platform that brings users inspiration with the biggest dataset of ideas ever assembled: over 100 billion recipes, home hacks, style inspiration and other ideas to try. They adopted OKRs — objectives and key results — as a goal setting framework when they were 15 person startup. Now more than 2,000 employees, they were looking to evolve their small team tooling to an enterprise solution.

Challenge

- Google Docs and Google Sheets that were not scaling.
- Grew from 15 to 2,000 employees (and many more initiatives).
- Employees wanted a more intuitive tool for seeing their own goals, team leads transparency into progress, leadership one place to understand the health of the business.

Solution

- Coda and Pinterest co-created a Pyramid OKR Tracker to house all OKRs in one place.
- Executives, Pillar Leads, Team Leads, and individuals have their own views into the same goals, can track monthly status updates.
- Automations — like Slack reminders — to keep things running smoothly.



Impact

Pinterest's EPD org achieved their goals for increasing transparency, efficiency, and stability after rolling out the Pyramid OKR Tracker.

Faster updates and less admin overhead, particularly for Team Leads, means that **Pinterest is saving an estimated $92,000 in effort each quarter.**

After the success within EPD, this new way of scaling OKRs has spread to other orgs like Marketing, People, and Sales, beginning to unify Pinterest under one OKR framework.

Learn more: Pinterest's Pyramid OKR Tracker

Netflix's Project Hubs

Creating visibility across work & aligning an org.

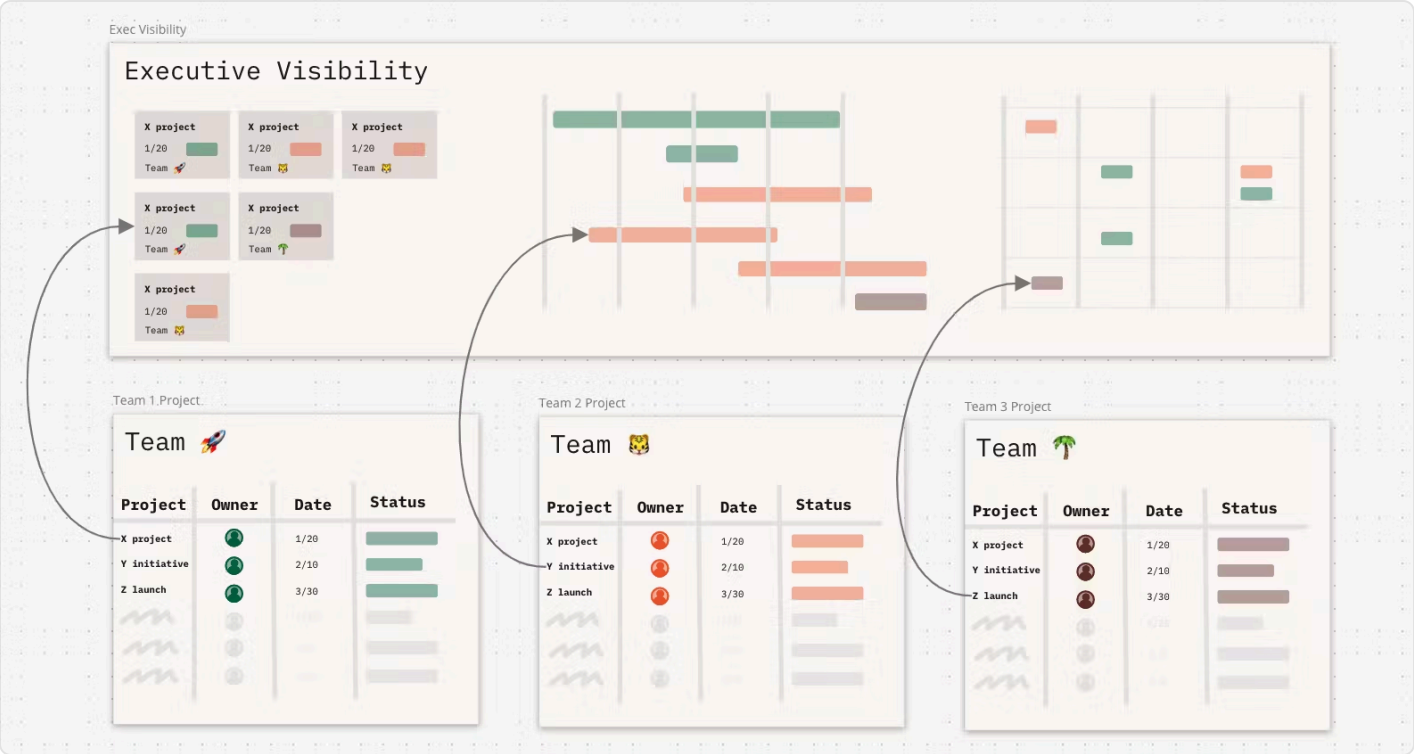
Netflix is the world's leading streaming entertainment service. Their Production Innovation organization empowers content creators — through new and emerging technologies — to tell their stories in impactful new ways. This organization needed a project management solution to plan, track, and create visibility across their hundreds of initiatives.

Challenge

- Each team within Production Innovation was tracking using their own tool: Google Sheets, Airtable, Monday, Asana.
- Increasingly global operations with remote and timezone collaboration hurdles.
- Leadership struggled with visibility and couldn't provide the clear direction, guidance, or course correction to the org. In short, leadership wanted to lead rather than play catch up.

Solution

- Coda and Netflix co-created a Project Hub doc ecosystem.
- Each team designed their own project management spaces while connecting with project tracking data, allowing them to retain their unique way of running while surfacing key progress insights up to leadership.



Impact

“Coda as a platform for visibility — with flexible team spaces is so aligned with Netflix’s culture of Freedom & Responsibility. By focusing on people over structure, we gave leadership exactly what they needed while each unique team could run their own way. Going with any off-the-shelf “Project Management” app wouldn’t have worked.”

- Camille Nussbaum, Manager of Project Management

It’s now much faster for Leadership to see duplicative work, so they can quickly consolidate efforts across teams, saving hours of misaligned project time. Netflix is starting to see patterns of current project efforts, and with this visibility, prioritizing work that more closely aligns with their objectives. This ensures that they are collectively pointing towards a north star across vastly different teams, locations, and people, and moving towards being the best at *entertaining the world*.

BUCK's Resourcing Center

Centralizing global production projects and resources.

BUCK is a creative animation agency, producing award-winning videos for clients like Apple (Share Your Gifts), as well as icons, graphics, and other digital content for the likes of Amazon, Hulu, and Mailchimp. With three offices (LA, NYC, Sydney), 300 staff, and thousands of freelancers, BUCK is a network of some of the most talented — and expensive — animation professionals in the world.

Challenge:

- Most agency offices, and even departments, operate independently, and BUCK was no different.
- As the teams scaled and cross-location/functional projects became increasingly common, the silos between Google Sheets (hundreds of them), Smartsheets, Greenhouse, and Mavenlink began to grow. The systems needed a refresh before taking the next step in agency ops.

Solution:

- The Production team, Functional Leads, and IT came together with Coda's Solution Studio
- Create a command center that brings together projects, people, and assignments, linking together the full funnel of client engagements and resource workloads.

Impact

The global studio has increased billable project utilization and sped up production delivery.

Coinbase's ProductOS

Bringing Product together across launches, requests, and XFN collaboration.

Coinbase is the leading digital currency platform where users can transact with crypto currencies like Bitcoin and Ethereum. In 2021 alone, they grew rapidly from 1,700 to 4,000 staff with the emergence of crypto as a recognized asset class and their IPO.

Challenge:

- Flexible & agile conflicting with structured management tooling: using Google Sheets to run launches, roadmap, planning, and requests.
- Massive headcount growth with a need for more structure but wanting to continue to move fast and stay agile.
- No out-of-the-box software solutions for their unique workflows.

Solution:

- Coda Solutions Architects & Coinbase's ProductOps team co-created the Product LaunchCal, Rolling Intake, Executive Dashboard docs.
- Product launches have structured actions across cross functional teams.
- Requests are made between organizations, tracked, and collaborated on.
- Dashboards report key metrics to c-suite.

Impact

Coda has become a key part of Coinbase's operations, helping them scale during hyper growth.

Ops

A ___Ops Platform for the new ___Operator

The Operations Department is spreading and embedding within functional teams, and tech is becoming core to a business' operations.

The new ____Operator brings their NoCode tech, systems thinking, and people leading skills to make multi-hyphened ways of hybrid working needed for success in agile markets.

Coda is the flexible surface that blends the best of structured (databases, tables, visualizations) and unstructured information (writing, whiteboarding, embedded content) all into one place. Collaboration built on the cloud for the digital workspace so that __Ops can build the right flows for their team.

"We design our unique ways of operating — our rituals — within the Coda surface."

Anne (Kaehny) Purves

UX Ops Lead.Google



ProductOps

We've moved hacky GSheets for launching product into surfaces that bring together Design, Eng, PMs, and all XFN stakeholders. Oh, and wiring up the rest of the product tech stake with Jira, Figma, and Slack while we're at it.

Figma case study

BizOps

Data flows out of Excel and DBs and into one unified surface where any business user becomes a business analyst.

Pinterest Case Study

PeopleOps

Onboarding new hires with playbooks, and bringing people together, while remote, with central knowledge in wikis.

Mode case study

SalesOps

Hitting your number while jumping between tools. Was using SFDC and CSV exports. Salesforce, Intercom, Hubspot Pack.

Keet Case Study

ResearchOps

Pulling insights across users and company and surfacing them.

Thumbtack, FranceTV

DesignOps

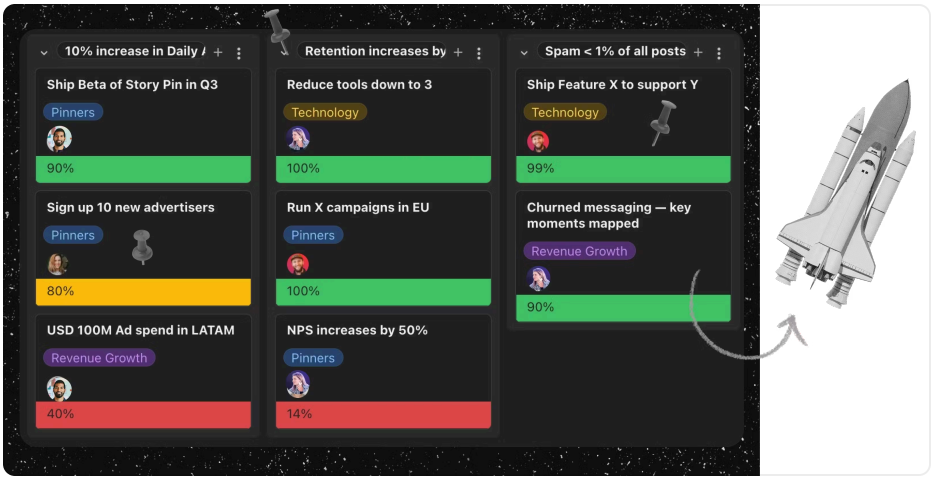
23andMe Case Study

Coda is a flexible canvas with building blocks to bring words, data, and applications together in one place. We think that PMs, Ops, and those on the front lines are the best at solving their own business challenges, if they have the right tool and partnership.

Co-creating your Coda WorkOS*

*work operating systems

Achieving goals at scale



"We had a ton of fun partnering with Coda to co-design and roll out our OKRs."

Naveen Gavini

Head of Product. Pinterest



OKRs (Objectives & Key Results) is becoming the high-growth, operating system standard for successful teams. We partner with leading Ops teams at companies like Pinterest, Robinhood, Brex, and Spotify.

Pinterest's Pyramid OKR Tracker that we created has increased operational efficiency by an est. $92k in effort each quarterly planning season across their 3k staff.

story

**Custom App

A ___Ops Platform for the new ___Operator

The Operations Department is spreading and embedding within functional teams, and tech is becoming core to a business' operations.

The new ____Operator brings their NoCode tech, systems thinking, and people leading skills to make multi-hyphened ways of hybrid working needed for success in agile markets.

Coda is the flexible surface that blends the best of structured (databases, tables, visualizations) and unstructured information (writing, whiteboarding, embedded content) all into one place. Collaboration built on the cloud for the digital workspace so that __Ops can build the right flows for their team.

"We design our unique ways of operating — our rituals — within the Coda surface."

Anne (Kaehny) Purves

UX Ops Lead.Google



ProductOps

We've moved hacky GSheets for launching product into surfaces that bring together Design, Eng, PMs, and all XFN stakeholders. Oh, and wiring up the rest of the product tech stake with Jira, Figma, and Slack while we're at it.

Figma case study, PandaDoc

BizOps

Data flows out of Excel and DBs and into one unified surface where any business user becomes a business analyst.

Pinterest Case Study

PeopleOps

Onboarding new hires with playbooks, and bringing people together, while remote, with central knowledge in wikis.

Mode case study

SalesOps

Hitting your number while jumping between tools. Was using SFDC and CSV exports. Salesforce, Intercom, Hubspot Pack.

Keet Case Study

ResearchOps

Pulling insights across users and company and surfacing them.

Thumbtack, FranceTV

DesignOps

23andMe Case Study

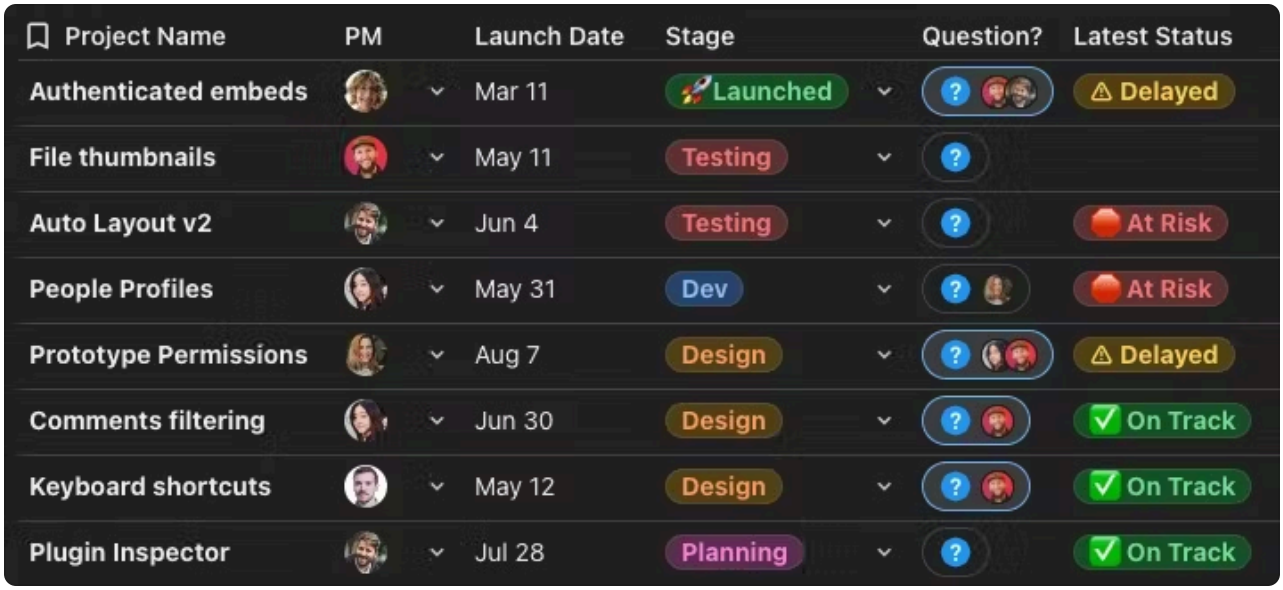
** Build a Pack.

Get with the program, manage the creative chaos

At the center of every program, project, or project is a person who's bringing together people, aligning actions, communicating vision, coordinating time. These PMs are the heart of making things happen, and there hasn't been a single tool to be that central, one hub, for them to do their best work.

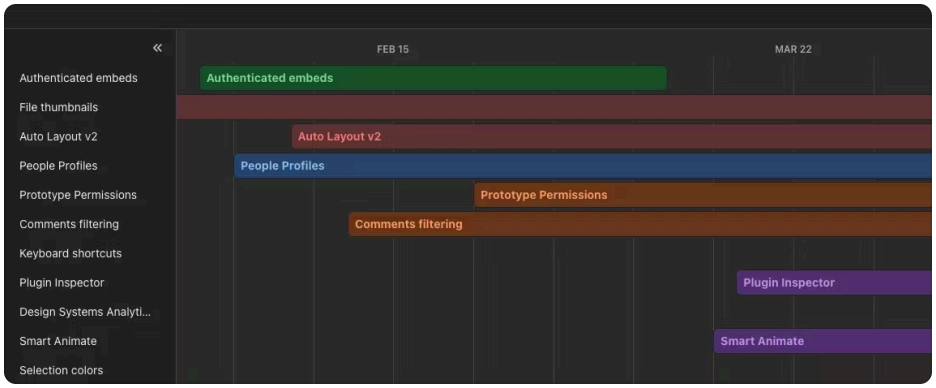
The Solutions Studio partners with those PMs —the ones who've built spreadsheets that accidentally became a system / tracker / tool, one-pagers that morphed into company manifestos—to create the system of their dreams.

Start with your center of gravity



A table. We architect the right base information.

Views for everyone

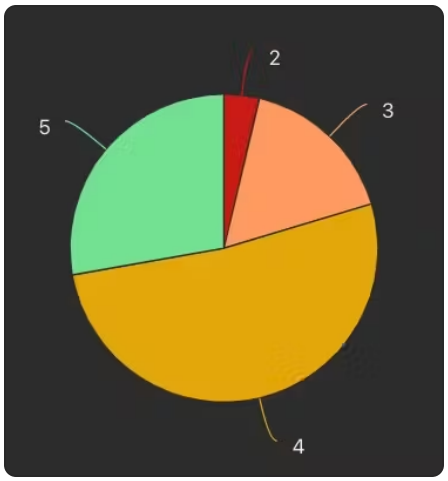


Timelines. Designing visuals for stakeholders.

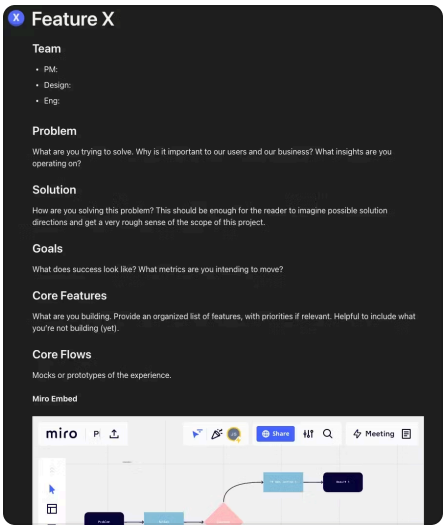
"We break all the silos that could exist between product and design teams"

Yolaine Mercier, ProductOps Manager

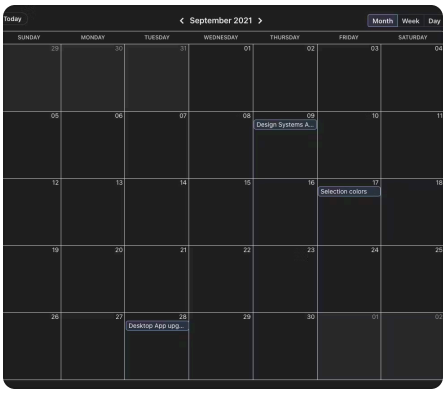
Michael Baeyens, Design Lead



Charts and graphs



Write ups



Calendar. And views for the team.

“We transitioned fifteen trackers across Google Sheets, Smartsheets, Trello, Asana into one Coda hub”

Rachel Williams

Program Manager. Masterclass

Netflix, BUCK, Coinbase, Masterclass

https://coda.io/@yuhki/figma-product-roadmap

**Transition

WorkOS

Coda brings together the most-used aspects of docs, spreadsheets, presentations and databases onto one canvas...a platform that enables processes and workflows ... allowing taste-making, product-centric companies like Spotify, Figma, and Intercom to share their thoughts and creativity across their companies and beyond.



Mammon Hamid

Partner. Kleiner Perkins

Board of. Figma, Slack, Greenhouse

#tags

docs

sheets

process

workflow

product-centric

creativity

Rosanne

Technical structure

Sources:

- Security report

WorkOS Stack

Coda's Document Platform System is a web-based Software-as-a-Service (SaaS) solution that

brings together features of documents, spreadsheets, and databases into a single flexible canvas. Along with powerful building blocks and formulas, Coda's flexibility allows anyone to create a custom-tailored solution to fit their business needs. Features of the Coda System include:

- **Docs:** users create, edit, share, collaborate, embed content, and connect to external services in the document surface — words, data, and app-like features all in one.
- **Tables:** Structured data like relational databases that allow customer end users to organize, view, manipulate, and reference data anywhere in the doc, including other tables. Table rows are treated as referenceable objects in the application.
- **Formulas:** Query, transpose, aggregate, and take actions on data with formulas, which can simplify complex multistep operations with chaining (similar to object oriented languages). Formulas in Coda can be used outside of tables, anywhere on the surface, and reference objects within Coda.
- **Packs.** Packs is a service that allows end users to connect Coda to external applications. It offers the ability to sync data and/or trigger actions across platforms.
- **Workspaces.** A workspace is a collection of user accounts that share access to a collection of docs.

System Technology

- **Infrastructure:** Amazon Web Services (AWS)
- **Microservices:** Node.js
- **Front End:** React, Typescript
- **Database:** Snowflake

Data & Security

SOC 2 Type 2 Certified

- Connection HTTPS / TLS. The traffic between the Coda System and external connections is also encrypted in transit.
- Storage: databases and blob storage housing customer data are encrypted at rest using AES-256.
- Incident processing: Sumo logic