CASE STUDY

Transforming Quotes into Sales:
Boosting Sales Quote Efficiency by 95% with Automation

Organisation Profile

The client is a leading metal service center founded in 1921 and headquartered in Birmingham, Alabama, is one of the nation's largest family-owned metal distributors. With a century of expertise, they continue to set industry standards in quality and service.

Industry

Manufacturing

Results

Increased Process Efficiency up to

90%

Manual effort reduced up to

95%

Enhanced accuracy up to

95%

Business Problem:

The company encountered significant difficulties in managing a substantial volume of Sales Quote requests. They grappled with the complexities of identifying part numbers, verifying inventory levels, and ensuring accurate pricing. These challenges resulted in frequent delays and inaccuracies in their responses, adversely affecting customer satisfaction and operational efficiency.

Challenges:

- Varied formats of sales quote requests complicate data extraction and interpretation.
- Complex data mapping and validation issues arise, including discrepancies and part number changes.
- Maintaining real-time inventory updates is challenging due to the high volume of requests.

Solution:

- **Versatile Document Processing**: Supports Word, Excel, and PDF formats for versatile document processing, catering to diverse customer preferences.

- **ePRONTO Integration**: Integrates seamlessly with ePRONTO e-commerce solution, ensuring a smooth flow from quote generation to potential order fulfilment.

- **Accurate Item Identification**: Utilizes advanced logic for precise item number identification and mapping, ensuring data integrity despite diverse item numbers.

- **Streamlined Sales Quotations**: Automates sales quotation generation workflow, reducing processing time and improving the customer experience.

- **Effective Exception Handling and Data Re-entry**: Incorporates robust mechanisms to manage discrepancies and outliers, facilitating efficient data correction and adjustment.

- **Comprehensive Audit Logging and Reporting**: Provides transparent record-keeping and reporting for system activities, enhancing accountability and compliance, and enabling performance monitoring through detailed reporting for informed decision-making.

Business Benefit:

The implementation of automated sales quote processing delivered significant benefits for the organization. It reduced effort by up to 95%, boosted efficiency by up to 90%, and freed resources for strategic initiatives. With approximately 95% accuracy and zero errors, it ensured reliable data and enhanced customer satisfaction. Its scalability and adaptability were proven by handling sales quotes for 125 customers. Straight-through processing capabilities streamlined workflows, accelerated sales cycles, and improved business agility. These advantages drove growth, optimized processes, and enhanced customer experiences.

Key Stakeholders:

• Client's IT Department
• Bot Developers
• Engineers
• Quality Assurance Team
• Project Management Team
• End Users of the Bots

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