Business Process Automation Case Study
Process: Quote to Order Workflow

CLIENT: Construction Company

SUMMARY

A construction firm faced operational challenges with manual data entry and a cumbersome Quote to Order workflow, impeding growth and efficiency. To address this, the firm implemented a solution that seamlessly automated the cost estimate to quote workflow, eliminated duplicate data entry, and automated the sending of proposals with e-signature capabilities. Integration between QuickBooks and PenguinData further streamlined project tracking. The results included a fully automated Quote to Order workflow, scalable automation foundation, substantial reduction in manual effort, improved process accuracy, and redirected focus towards business expansion. The streamlined and automated processes allowed for the implementation of more strategic initiatives, fostering growth and efficiency.

CHALLENGES

- The Construction Firm relied on multiple points of manual data entry across various systems, leading to the need for a large back-office team to sustain operations.
- Challenges with the Quote to Order workflow hindered growth and operational efficiency.
- Manual processes for creating cost estimates, proposals, and project creation diverted valuable resources, impacting overall progress and growth potential.

SOLUTION IMPLEMENTED

COST ESTIMATE TO QUOTE WORKFLOW:
We created a seamless automated workflow that tied together the cost estimate and proposing processes, eliminating the need for duplicate data entry. This streamlined the entire quote generation process.

AUTOMATED SENDING OF PROPOSALS:
Our solution automated the sending of proposals, including e-signature capabilities, saving time and ensuring prompt delivery to clients.

QUICKBOOKS & PENGUINDATA INTEGRATION:
We developed a workflow that automatically synchronized data between QuickBooks and PenguinData, eliminating the need for manual data entry and ensuring accurate project tracking.

Stop wasting time & money on inefficient processes.

- **Remove Manual Workflows**
- **Save Time**
- **Increase Productivity**
- **Increase Efficiency**
- **Reduce Errors**
- **Enable Growth**
- **Drive Success**
- **Streamline Processes**

No upfront cost or IT needed

RESULTS

- Fully automated Quote to Order workflow
- Elimination of duplicitous data entry
- Scalable foundation for automating other related workflows
- Substantial reduction in manual effort
- Improved accuracy in processes
- Redirection of focus towards business expansion with time and money saved
- The streamlined and automated processes allowed more strategic initiatives to be implemented