

Optimally Business Performance

We bring enterprise-level Business Process Automation to small and medium sized businesses, with no need for internal IT resources. Designed to remove manual workflows, saving time, increasing productivity, reducing errors, and enabling growth. Billed on a monthly basis AFTER implementation - a truly risk-free path to enhanced efficiency and scalability!

Explore how our cutting-edge Business Process Automations can streamline your processes, boost productivity, and drive success.

Our team of experts is ready to provide tailored solutions to help achieve your goals!

Automating Quote to Order Workflows and Driving Growth for a Construction Firm

Optimally recently worked with a Construction Firm who relied on multiple points of manual data entry across many systems, necessitating an excessively large back-office team to sustain operations.

Client Challenges:

The Construction Firm faced numerous challenges with their Quote to Order workflow, which hindered their growth and operational efficiency. Instead of dedicating time and effort to business expansion, the owner and management team found themselves spending most of their time putting together quotes and proposals. The manual nature of their quote to order process not only consumed valuable resources but also diverted attention away from strategic initiatives, negatively impacting the firm's overall progress and growth potential.

Pain Points Addressed:

1. DUPLICITOUS DATA ENTRY:

The convoluted process involved creating cost estimates in Excel, then creating proposals in a different Excel spreadsheet, followed by project creation in Quickbooks and Penguin Data, and ongoing daily entry to keep all systems up to date.

2. GROWTH OBSTACLES:

The manual nature of the data entry process required an excessive allocation of the firm's resources for staffing.

Optimally Solutions



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.



SCALABLE AUTOMATION:

By implementing our solution, our client achieved a completely automated Quote to Order workflow. This not only eliminated duplicitous data entry but also provided a scalable foundation for automating other related workflows.

Results

Our client experienced a significant reduction in manual effort, improved accuracy, and enhanced scalability. With the Quote to Order workflow fully automated, they were able to redirect their focus towards business expansion and strategic initiatives.