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!

Contact Information

BUSINESS PROCESS AUTOMATION 101: THE BASICS

INDUSTRY - Repair & Maintenance
BUSINESS TYPE - Machining Company

THE CHALLENGE - This company previously relied on a highly manual quote-to-order system and a cumbersome new customer onboarding process. Quotes were manually created and sent using Excel and email, with follow-up emails required for each interaction. Moreover, the customer onboarding process involved requesting contact information, manually sending onboarding packets, and managing information in a disorganized manner, resulting in document loss and human errors.

THE SOLUTION -

The first process focused on quoting, encompassing the creation of prospect request and intake forms, automated quoting calculations, quote review and editing features, electronic signature integration, notifications, and cloud storage for signed agreements.

The second process focused on new customer onboarding, streamlining customer contact information requests, task scheduling for sending onboarding packets and follow-ups, cloud folder creation for new customers, and automatic storage of completed onboarding documents. These automated solutions significantly improve efficiency, accuracy, and overall customer experience within these processes.