



Automation of quotation generation process for a white goods manufacturer using Intelligent Automation

The Organisation

One of India's largest business conglomerate with diversification across manufacturing, real estate, financial services and white goods. RSutra's project association was with the sales support function of one of the manufacturing divisions of the group.

Challenge

Creation of quotations based on the specifications received from Sales team was one of the most time taking processes in this organization. This process was time critical because sales people expected the quotation sent back to them as soon as possible. There was continuous inflow of requests from sales team across the country at the organization's centralized back office. There were significant number of FTEs which were involved in creation of these quotation requests. As this task was critical and had peak loads, back up resource was mandatorily required in case main team was unavailable. In addition, in case of attrition, training of new employees was a challenge. The quote generation process being a monotonous and mundane task, posed a challenge of keeping the employee's morale high. As this task was manual, there were chances of creating quotations with improper details not matching as per the requirements of the sales person.

Solution

Customized solution was required to create multiple quotations in a day with 100 per cent accuracy and quick turnaround time. The client engaged RSutra to leverage a reputed RPA solution for creation of quotations. Our team designed a customized solution leveraging RPA capabilities like web automation, MS Excel & e-mail automation, keeping the format of the created quotations, standard and presentable.

A Software Robot that helps in **creation of quotations and forwarding** them to the sales team within the desired TAT

Benefits accrued

- Significant man-hours saved annually
- ~100% accuracy in processing & output
- Timely processing without missing a day
- Dozens of quotes available on a click
- Furnished quote sent directly to end users with least TAT
- Realignment of FTEs to more critical tasks

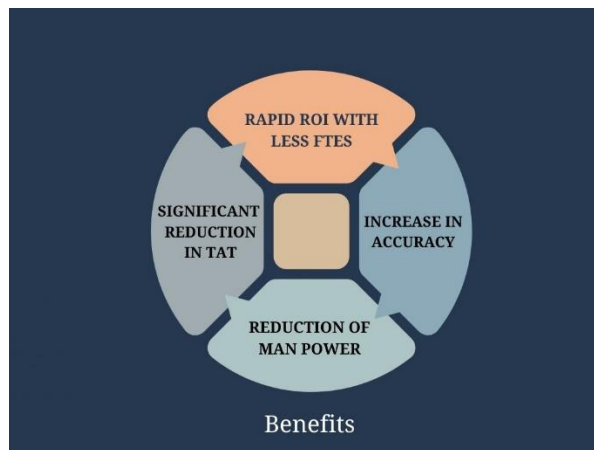
The deployed software robot automated quotes generation process covering these activities:

- Logging into the CRM system
- Downloading quote generation requests raised by sales team
- Creating the Quotations post data quality validations
- Keeping the format in a standard template and conducting quality checks
- Sending the approved quotes to sales team via e-mail

The solution maintained a tracker of all requests sent by the sales team, quotations e-mailed to them and Turnaround Time (TAT) achieved in the process.

Benefits

The solution automated the entire quotation generation process, eliminating the risks of errors and missing processing deadlines. Rapid ROI was achieved through saving of significant FTEs and availability of the quotes on a single click.



Adhoc reporting was made much easier as software robots were able to reduce the execution time by ~30% and with 100% accuracy. Additionally, the bot was able to meet peak demands without any need for additional manpower.

Results

The organization automated their standard quotes creation process and freed up the time of resources to focus on analyzing plans and improving planning with the aim of enhancing productivity. The sales team were able to get their quotations on time and were able to service the prospective clients efficiently.

Solution highlights

- Software robot that **can operate all systems** like CRM, legacy applications, MS Excel and e-mail system
- Solution can carry out data massaging, creation of quotation from master list and **can format the quotation document**
- Solution can keep **track of requests and TAT achieved**
- Ability to **handle peak loads** during month-end and year-end
- Solutions offers benefits like **zero errors** and negligible need for manual intervention

About RSutra Analytics & Consulting

RSutra Analytics & Consulting offers services in Data Science, Artificial Intelligence, Machine Learning, Advanced Analytics, Big Data, Robotic Process Automation, Geographical Information Systems and Cloud-based technologies

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