

Accelerating Business Decisions & Innovation: How AI and Automation Realized 96% Time Savings in Document Fabrication

Our customer is a US based technology consulting firm specializing in cybersecurity risk management. They provide comprehensive services to help their clients migrate cybersecurity risks and ensure secure technology deployments for optimal protection.

THE NEED

Our customer wanted to optimize their business decision-making & sales proposal creation capabilities. We devised a tailored solution to automate document fabrication for their sales team leveraging modern technology like AI and Automation.

THEIR CHALLENGES

- ✓ The Sales team faced challenges in generating accurate and comprehensive proposal documents for its customers. Each proposal document took their Sales executive 6-8 hours to create.
- ✓ Manual efforts and inconsistencies hindered efficiency, limiting their ability to respond quickly to customer requirements.
- ✓ They sought a solution to streamline document fabrication, save time and improve the accuracy of their proposals.

OUR SOLUTION

Data transformation and fabricator-based document generation

We implemented data transformation mechanisms to convert collected data from customer interactions into structured information suitable for proposal document creation. By utilizing pre-built fabricators, Microsoft Power Automate capabilities and generative AI integrations, we automated the process, enabling the fabrication of accurate and comprehensive proposal documents with just a few clicks.

HIGHLIGHTS

Saved **80**
hours of labor
time per
month

Reduced
document
drafting time
by **96%**

Saved
\$400 for
every proposal
created

OUTCOMES

The implementation of our solution brought about significant outcomes for our customer:

Saved time, effort, and cost

Automating the document fabrication process brought efficiency into their sales proposal process, saving approximately 80 hours per month. The CEO was excited about the potential impact on their business. He said *“This was an incredible experience for us to take a real-world use case to improve a business process using AI to create real value for our organization. This solution will save us about **80 hours per month** resulting in our team being able to send more proposals and having a competitive advantage”*



With our solution, their sales managers could now draft a proposal document in a few minutes, a process that previously took them **6-8 hours**. With a labor rate of **\$60 per hour**, this translated to approximately **\$400 saved for every proposal created**.



Improved accuracy and consistency

Our solution ensured the accuracy and consistency of proposal documents through fabricators and data transformation mechanisms. Manual errors and inconsistencies were eliminated, resulting in professional-looking and error-free proposals.

Achieved business agility and competence

The automated document fabrication process enhanced our customer's business agility. Faster proposal generation and advanced summarization capabilities provided through modern AI technology enabled them to respond quickly to customer requirements and adapt to evolving market demands, giving them an edge over competitors. It also opened the door for further AI adoption in the future. While discussing this, the CEO remarked, "I'm already envisioning new potential AI use cases that wouldn't have been possible without this initial venture into AI."



TECH STACK



Open AI



Microsoft Azure Serverless



Power Automate

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From the beginning of the sales process to the carefully constructed sales proposal that you created containing all our requirements to the execution of fulfilling all promises in the sales contract, your organization was professional and delightful to work with from start to finish! I also am super impressed with the power automate functions, which work seamlessly. This was a critical feature to make the tool easy to use for our sales team without modifying their training or processes. I can't say thank you enough for producing such an excellent solution for our sales team! Without hesitation, we would be honored to work with your team again in the future.

- CEO,
Technology consulting firm, US