



Industrial Equipment Distributor Reduces Quote & Proposal Generation Time by 70%



Industry

B2B Industrial
Equipment
Distribution



Company Size

201-500
Employees



Region

North
America



Featured Solution

Quote & Proposal
Automation

The Customer

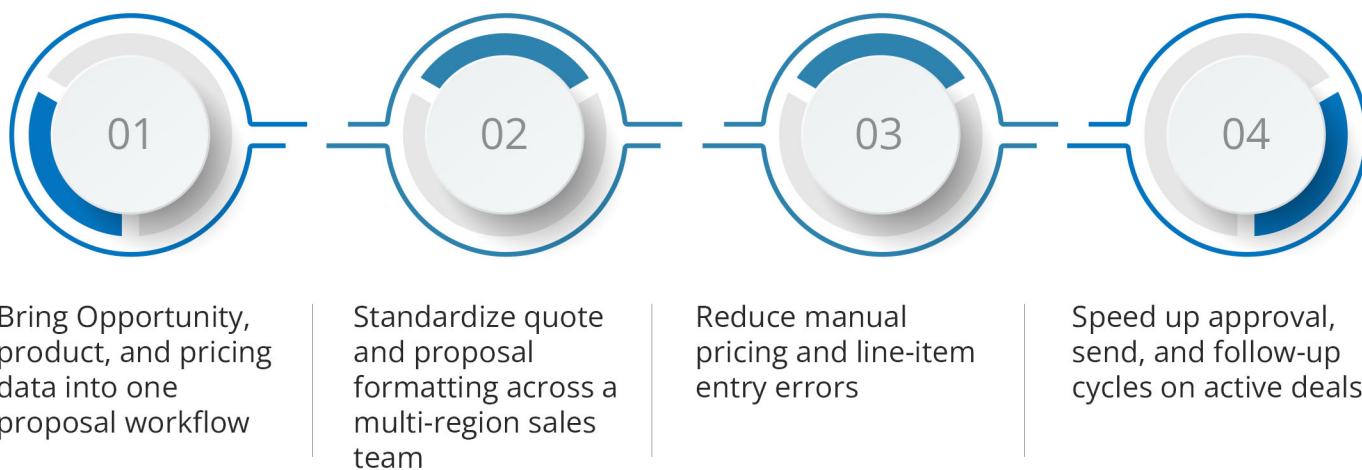
The client is a mid-sized B2B distributor of industrial equipment and MRO parts, serving manufacturing and construction clients across North America. With a 40-person outside sales team managing hundreds of active opportunities in Salesforce, the company needed a faster, more consistent way to turn pricing and product data into customer-ready quotes and proposals.

Problem Statement

The reps were building every quote and proposal by hand, exporting Opportunity and product data from Salesforce, pasting it into Word templates, and manually formatting pricing tables, discount tiers, and terms. The process took 30-45 minutes per proposal, introduced frequent pricing and formatting errors, and made it difficult to keep quotes consistent across a growing, multi-region sales team.



The Challenge



The Solution

We implemented 360 InstantDocs to automate quote and proposal generation directly from live Salesforce Opportunity and product data.

- Built branded quote and proposal templates inside 360 InstantDocs for the sales team
- Merged Opportunity, Account, and product/pricing fields directly from Salesforce into every template
- Used conditional logic to auto-apply discount tiers, tax rules, and region-specific terms
- Enabled one-click generation for single deals and bulk generation for multi-line, list-view quote runs
- Auto-built line-item pricing tables and totals, removing manual spreadsheet lookups
- Saved every generated proposal to Salesforce Files and enabled direct email delivery to the buyer

The Outcome

The client replaced a slow, error-prone proposal process with a standardized, one-click workflow inside Salesforce. Reps now generate fully formatted, on-brand quotes and proposals in minutes instead of manually assembling them, keeping pricing accurate and deals moving through the pipeline faster.

The Impact

70% Reduction in average quote and proposal generation time

3x Faster proposal turnaround from request to send

92% Fewer pricing and line-item errors

2.5x Proposal volume scaled without adding headcount

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