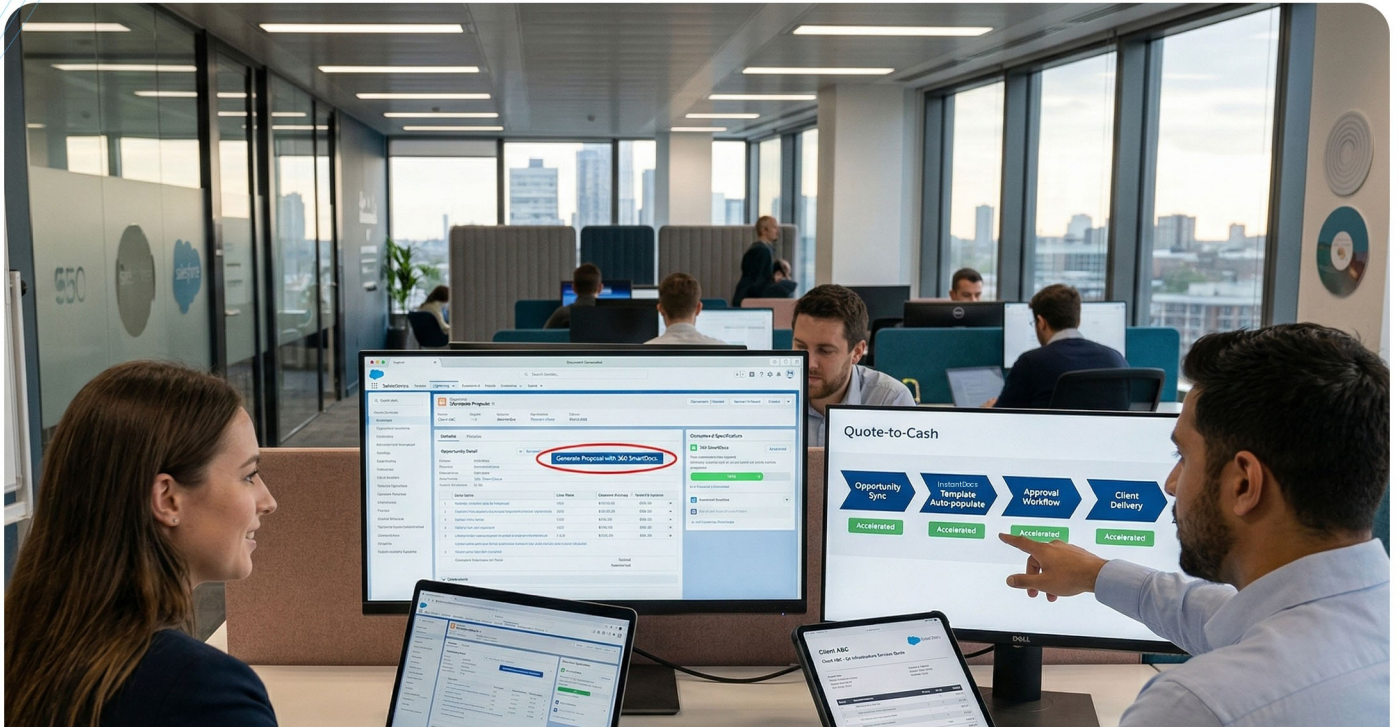




# IT Services Firm Achieved Accelerated Proposal & Quote Generation in Salesforce with 360 InstantDocs



**Industry**  
IT Services



**Company Size**  
101-250  
Employees



**Region**  
Seattle,  
Washington



**Featured Solution**  
360 InstantDocs  
Proposal & Quote  
Automation

## The Customer

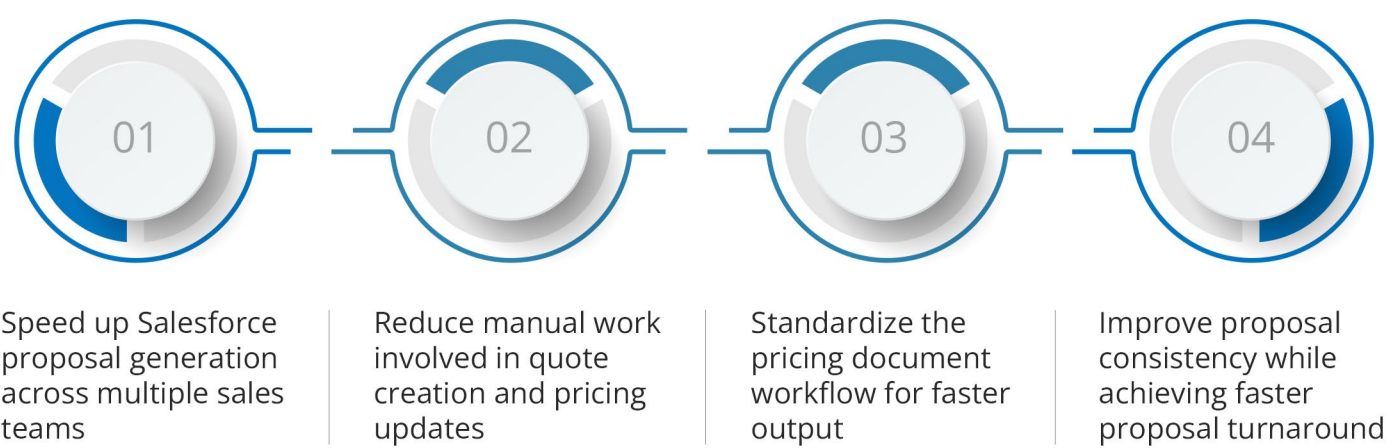
Our customer is a growing IT services firm delivering cloud consulting, implementation, managed services, and custom development solutions. As deal volume increased across service lines, the sales team needed a faster way to handle proposal and quote automation in Salesforce for IT services without relying on manual document preparation and repetitive formatting work.

# Problem Statement

The customer’s sales team was creating proposals and quotes through a slow manual process involving copied deal data, spreadsheet-based pricing, repeated formatting, and internal review cycles. This delayed Salesforce proposal generation, made quote creation harder to scale, and slowed the overall pricing document workflow across active opportunities.



# The Challenge



# The Solution

We implemented 360 InstantDocs to streamline proposal and quote automation directly inside Salesforce.

|                                                                         |                                                                                   |                                                                                   |
|-------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| Built branded proposal and quote templates in InstantDocs               | Used merge fields to pull customer, opportunity, and pricing data from Salesforce | Applied conditional logic for service scope, pricing terms, and optional sections |
| Enabled one-click proposal and quote generation from Salesforce records | Supported PDF and DOCX output for client-ready documents                          | Used template controls and versioning to keep every proposal consistent           |

## The Outcome

With 360 InstantDocs the customer replaced a fragmented proposal process with a faster and more structured workflow inside Salesforce. Sales teams could generate proposals and quotes with less manual effort, improve accuracy across pricing documents, and respond to clients faster with consistent, branded outputs. This helped the business improve proposal quality while reducing delays across the sales cycle.

## The Impact

Proposal  
turnaround  
reduced from  
days to hours

80+ sales hours  
saved per  
month

Faster quote  
response  
improved bid  
competitiveness

4x more active  
opportunities  
handled by  
sales

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