cloudmoyo™

Partner of choice for solutions at
the intersection of cloud and AI

CloudMoyo helps an engineering company achieve efficiency and save time by creating standardized quotes and cost calculations

Introduction

As a company grows, manual approval processes around quotes and lack a standard quote creation platform create inconsistencies and inefficiencies across the company.

Our client

Our customer, a large consulting engineering company specializing in environmental, facilities, geotechnical, and materials services, has over 5,000 employees in more than 150 offices. Its operations span across all 50 U.S. states, with offerings that serve U.S. clients conducting international business. CloudMoyo partnered with this company to eliminate sales cycle pain points by creating standardized quotes for their enterprise, further enhancing their environmental engineering and consulting services across the world.

The challenges

The customer was running up against the challenges of generating clients' quotes efficiently. They had their own proposal system but lacked an existing tool to estimate quotes from customers. This created several major pain points:

Lack of a standardized price quote creation platform across the company

A manual approval process across geographical locations

Lack of a central repository for archiving and discovery of quotes for different stakeholders

Absence of versioning (maintaining version history and comparing different versions), which serves as a quick reference point to help in making decisions

What was needed was a solution to help the customer speed up their financial calculations by creating an automated process for quotes generation, thus reducing time, and accelerating the quoting process.

❓ Why CloudMoyo

➢ **CloudMoyo is a Microsoft Partner and has over 10 years of experience with Azure.**

➢ **CloudMoyo was referred to the consulting engineering company by Microsoft.**

➢ **One of our previous customers – a leading AEC company provided a stellar recommendation.**

The solutions

CloudMoyo implemented a way to identify and estimate the costs it takes to execute projects, as well as efficiently speed up the entire workflow. To accomplish this, we developed a system that automates the approval process, the calculations, and the necessary costs involved in the project end-to-end.

Cost estimation

The customer is now able to estimate data costs for four detailed dimensions of the project:

- The cost of labor
- Lab tests
- Site characterization (such as drill machines for construction)
- Other direct lump sum costs, including subcontractor costs

In addition to these cost calculations, the customer can estimate overall revenue and margins to predetermine the profit or loss of a particular project.

Quote searching

CloudMoyo also devised a "search of quotes" feature that helps the customer's stakeholders look up, reference, and share quotes efficiently within the company. For sensitive quotes that require a higher level of security and protection, the quote team can edit and manage the access of certain stakeholders involved in the project. Quote owners can also choose to make quotes non-sensitive, so that anyone within the organization can view, edit, and access the quotes.

Templatization

Another functionality CloudMoyo has implemented for the customer is the ability to create, save, and reuse templates for quotes. Just as how Power BI templates can be created and recycled for data visualization purposes, the sales team can use pre-saved templates to add necessary information, reuse components, and share templates with other colleagues. This can significantly save time and effort in generating quotes for customers and partners.

Other key features of the solution include:

An approval process with email notifications and Outlook tasks that are auto generated by a system

A central repository for all price quotes across the enterprise, with discovery capabilities across 340 offices

Improved usability and accelerated quoting process

Features to create copies of, and new quotes, using predefined templates

Implementation of quote versioning based on events in the quote lifecycles

Technological components for better security, scalability, and maintenance

Regular load and performance tests along with code improvements to serve high performance demand

Integration with on-premises systems like Oracle ERP using cloud capabilities and secure APIs

With CloudMoyo help, our customer has been able to identify and eliminate inefficiencies in generating quotes and having them approved, moving away from time-consuming, manual approval processes. The new, automated quoting process has sped up the sales process and reduced unnecessary effort for the customer, helping them meet the needs of their clients. Using the new automated platform and system, the sales team can create new quotes faster with in-built templates, and reference existing ones with ease and flexibility. By accelerating the quoting pipeline, they have also been able to boost quote velocity to 2.27 days and shorten the lifecycle to get a quotation completed. This can enable our client to free up resources and free up more time to engage with potential business prospects.

About Us

CloudMoyo is the partner of choice for solutions at the intersection of cloud and AI. We help modern enterprises define their path to the cloud and leverage the power of data-driven insights. As a leading cloud and analytics partner for Microsoft, CloudMoyo brings together powerful business intelligence (BI) capabilities using the Azure data platform to transform your complex data into actionable insights and modernize your data landscape. We help you achieve insight, innovation, and impact through big data, machine learning, predictive analytics, and visual story-telling.

Headquartered in Bellevue, WA, with an innovation center in Pune, India, and a presence in Kansas City, CloudMoyo is poised to help intelligent enterprises build innovative solutions and help them stay ahead in the disruption cycle. Our proven track record includes developing enterprise solutions for Fortune 1000 companies such as Microsoft and Kansas City Southern.

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