# Case Study: Streamlining the quote-to-project process

## Company: Precision Fab Inc. (an illustrative example)

### The problem

Precision Fab Inc., a custom metal fabrication shop, was losing business because its quoting process was too slow and prone to errors. The sales team was bogged down in administrative work, engineers were constantly interrupted for estimates, and customers often waited a week just to get a price. This delay meant potential customers went to competitors, and the errors in quotes which did go out caused rework and reduced profit margins.

The goal was to cut the quote turnaround time and improve accuracy, freeing the expert team to focus on high-value work.

### The "Before" picture: current state value stream map

This map shows the original process, highlighting the delays and wasted effort:

- Step 1: Customer sends a product inquiry via a generic email address.
- Step 2: A salesperson manually enters the request details into a shared spreadsheet. *[WASTE: manual data entry]*
- Step 3: The salesperson emails an engineer to get a technical review and labor estimate. *[WASTE: handoff & interruption]*
- Step 4: The engineer, busy with production work, takes 2-3 days to respond to the email. *[WASTE: wait Time]*
- Step 5: The salesperson gets the engineering notes and manually creates a quote in a Word document. *[WASTE: manual task & high chance of error]*
- Step 6: The quote is reviewed by a manager for final approval. This can take another day. *[WASTE: wait time & bottleneck]*
- Step 7: The final quote is emailed to the customer.

*Summary of "Before" state:*

- ✓ Total Process Time: 5 to 7 business days.
- ✓ Actual Work Time: Approximately 3 hours.
- ✓ Key Issues: Multiple wait states, dependency on specific people, high risk of data entry errors, and a poor customer experience.

### The "After" picture: future state value stream map

This map shows the new, streamlined process after improvements were implemented:

- Step 1: The customer fills out a standardized online quote request form on the company website. *[IMPROVEMENT: standardized input, better data quality]*
- Step 2: The form submission automatically creates a new deal in a central quoting tool, notifying both the sales and engineering teams at the same time. *[IMPROVEMENT: automation, parallel workflows]*
- Step 3: The tool applies pre-defined material costs and standard labor rates, generating a baseline quote instantly.

- Step 4: An engineer reviews the request in the tool, adds any notes for custom work, and approves the technical specs. This takes about 15 minutes. *[IMPROVEMENT: reduced interruption, faster review]*
- Step 5: A salesperson gives the quote a final review and sends it to the customer directly from the tool. The quote is generated from a professional, error-free template. *[IMPROVEMENT: quality & speed]*

*Summary of "After" state:*

- ✓ Total Process Time: 1 to 2 business days.
- ✓ Actual Work Time: Approximately 45 minutes.

## Results

By redesigning the process first, Precision Fab Inc. achieved significant results without a massive software investment.

## Summary

- ✓ Quote Turnaround Time: Reduced by over 70%, from one week to less than two days.
- ✓ Quoting Errors: Nearly eliminated due to standardized inputs and templates.
- ✓ Sales Team Capacity: Freed up more than 10 hours per week from administrative tasks, allowing them to focus on building customer relationships.
- ✓ Quote Win Rate: Increased by 15% in the first quarter because of faster and more professional responses.