

# Greater insight with a centralized system and powerful reports

Industry: Manufacturing



## Challenge

A multinational manufacturer derives a significant amount of revenue from aftermarket services, such as providing replacement parts and refurbishing outdated equipment. Numerous sites across many global regions take in customers' industrial equipment and bring it back to spec.

Each location generated quotes for service using its own version of quoting spreadsheets, with tens of thousands of data points and macros holding them together. Without a centralized system, employees would regularly lose the quotes to forgotten folders or in an avalanche of emails. Updating any quotes required diving into massive spreadsheets, redistributing them, and hoping that no one still used an old version.

Facing spiraling complexity, low visibility, and divergent processes, the firm turned to Macedon Technologies to help orchestrate their digital transformation journey.

## Solution

Macedon leveraged the Appian platform to build a solution in only three months that produces standardized quote documents across multiple locations. Technicians step through streamlined interfaces and only have to enter a minimal amount of data. They see the status of

*"Macedon, via the Appian platform, helped us accelerate our business operations and improve the overall customer experience."*

*— IT Manager for Services*

## Solution Continued

all of their quotes in one centralized dashboard and can easily create new revisions while maintaining a history of the request.

Management has greater insight with automatically captured KPIs and powerful reports. They can also update the factors of a quote without writing complex programming or tenuously distributing new spreadsheets.

The client now updates a single template to affect all locations while maintaining the flexibility to include location-specific sections. They easily swap out whole pages to remain compliant and include terms and conditions mandated by the legal department.

With low code, the application integrates with existing ERPs to pull in customer data. The system also uses localized site settings such as language, currency, and specific costs to generate quote documents quickly.

## Result

By reducing user input and intelligently auto-populating large parts of the data intake, Macedon's solution reduces time and errors due to manual entry. Updating disparate spreadsheets went from days of work and training to instantaneous distribution - just the click of a button. The early adopters are thrilled by the modern interfaces; with minimal assistance, the firm is swiftly expanding the application to support a dozen more sites.

With the significant success of the quoting application, the next step is to expand this application to track the post quote process. Other business units are quite impressed with the team and Appian, and they are looking to leverage both to modernize their own workflows.

## From complex and disorganized to automated and modern



Greater Visibility



Improved Reporting



Scalable



Automated



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## About Macedon Technologies

Macedon is a recognized leader in intelligent automation and cloud data solutions. We have deep expertise with industry-leading technologies that we leverage to solve our clients' unique challenges.

Our hybrid roles achieve better solutions faster than traditional development teams.