PROVUS
Services Quoting Cloud

VDA + Provus: Elevating the Quoting Experience with AI-led Services Quoting Cloud

vda®

Founded
1980

HQ
East Hanover, NJ

Employees
150+

Website
vdassoc.com

VDA is the nation's leading elevator and escalator consulting firm. The company provides comprehensive consulting and inspection services for elevators, escalators, and other conveyance systems in new and existing properties. Since its founding in 1980, VDA has provided services for more than 43,000 projects, helping clients navigate their vertical transportation needs.

Challenges

As a fast-growing consulting organization, VDA needed a robust and accurate Services Quoting solution to improve its quoting process and support its continuous vertical transportation projects.

Like most consulting services, VDA's services can be highly complex as pricing is based on service type, account type, geographies, number of sites, number of units, hourly rates, and level of support.

With over 130 consultants at various locations around the United States, it's not unusual for VDA to face some difficulties around quoting estimation, data processing, and proposal generation. Some challenges included:

- Multiple data entry points during the proposal creation process
- Excessive manual document formatting and customization
- Lack of enforced approval flow
- Excessive template options and variations
- Inability to set enforced milestones
- Data not being passed to the project upon acceptance

As VDA was dealing with more and more projects, it was becoming increasingly difficult to standardize quote estimation, generate consistent proposals, and allow personalized customization. The company spent too much time fixing inconsistent data and manually formatting client-facing documents.

Solutions

VDA didn’t have an efficient system for quoting their consulting services and offerings and needed to resolve data discrepancies and broken workflows.

Having a solution that integrates with Salesforce was a must for VDA. The VDA leadership team attended Dreamforce, the largest Salesforce community conference in the world, in search of a solution that meets their needs including:

- Ability to navigate intelligence while building an estimate
- Remove any/all standard templates currently in place
- Incorporation of all nuances to allow customization
- Standardize estimating, proposal generation, and project onboarding protocol
- Consistency with client-facing documentation
- Guidelines on market/same-client pricing
- Automation of proposal generation
- Ability to integrate with their existing tools and systems

“Our mission is to provide solutions for our client’s vertical transportation needs in a timely and professional manner,” said James Peterlin, Senior VP of Sales & Business Development of VDA.

Through detailed research and considerations, the company chose Provus, an AI-led quoting platform built natively on the Salesforce platform, to empower VDA to easily estimate, quote, and customize their services.

Provus’ Services Quoting Cloud gives VDA a simplistic, consistent, fluid estimating system that allows their consulting team to provide dynamic proposal generation that will “Lead the Way” in client solutions.

> Provus’ Services Quoting Cloud platform will improve how we quote and price our services. The more efficient and streamlined internal process will provide our clients with faster turnaround time and higher quality services.
>
> Troy Adams, Chief Information Officer, VDA

Benefits of Provus

Overall, the Provus platform makes it easy for VDA to generate accurate service estimates so they can develop productive and long-term relationships, renewals, and follow-up sales.

- AI-led “What-if” Scenarios: Create different scenarios to quickly identify the option that increases gross margin, saves money, and curbs revenue leakage without using spreadsheets, versioning, emails, etc.
- Optimize Gross Margins: Set rules with a data-driven, easy-to-use, and configurable rules optimizer, then trust the system to take care of the rest.
- Increase Win Probability: Ensure the creation of optimal quotes by using historical data to analyze and learn from so you can create quotes with the best chance of deal closure.