



Bijuterie Software

Operational Diagnostic & Consolidation Roadmap

Prepared For:

A Case Study in B2B Distribution & Project Management

Date:

January 16, 2025

This document presents an anonymized summary of a real-world diagnostic performed for a mid-sized company in the architectural finishing sector. It is intended to demonstrate our process and the value of a unified internal system.

Context:

The subject company manages a complex catalog of products from multiple international suppliers. Its core business operations—from quoting to project execution—relied heavily on a disconnected set of tools, primarily spreadsheets, email, and standalone accounting software.

Key Challenges Identified:

Data Fragmentation: Price lists were stored in dozens of non-standardized Excel files, leading to frequent pricing errors and inefficient product searches.

Operational Inefficiency: The process of creating, validating, and approving a single sales quote involved numerous manual steps and email exchanges, consuming an estimated 8-10 hours of work per salesperson per week.

Lack of Visibility: Management lacked a real-time overview of sales pipelines, project statuses, and true profitability per quote without manual data compilation.

High Operational Risk: The reliance on manual processes created significant risks of errors in quantities, incorrect discount application, and delays in client communication.

Recommended Solution:

The implementation of a custom-built, unified operational platform to act as a central nervous system for the business, integrating product management, quoting, workflow automation, and project management.

Projected Benefits:

Reduce quoting and approval time by over 90%.

Centralize 100% of product, client, and project data into a single source of truth.

Provide real-time managerial visibility into team performance and project profitability.

Eliminate critical pricing and quantity errors through standardization and automated approval flows.

Our diagnostic mapped the company's existing workflow for a typical sales quote, revealing significant bottlenecks and points of friction.

Typical Workflow Steps:

Salesperson: Manually searches through multiple supplier Excel files to find products and pricing.

Salesperson: Creates a preliminary quote in a local Word or Excel document.

Email: Sends the draft to the Technical department for quantity and specification validation.

Technical Team: Makes adjustments and sends an updated file back via email.

Salesperson: Manually incorporates technical changes and calculates final discounts.

Email/Phone Call: Seeks approval from a Manager or Accounting for discounts exceeding a certain threshold.

Finalization: Once all approvals are gathered, the final document is created and sent to the client.

Identified Friction Points:

Wasted Time: Manual searches and data entry are slow and error-prone.

Version Control Issues: Email-based collaboration leads to confusion with multiple file versions.

Lack of Audit Trail: No centralized history of changes, approvals, or communications exists.

We designed a centralized software solution to replace the fragmented workflow with a streamlined, intelligent, and fully integrated process.

Key Platform Modules:

1. Centralized Product Database:

An intelligent import tool that reads any Excel format and standardizes product data.

Automatic generation of unique internal product codes for consistent tracking.

Instant search functionality across the entire product catalog.

2. Integrated Quoting & CRM Module:

Rapid quote generation using pre-defined, customizable templates.

Automated discount controls with role-based override permissions for managers.

A complete view of clients, project sites, and contact history.

3. Automated Approval Workflow Engine:

A generated quote automatically notifies the Technical team for validation within the platform.

Changes are tracked and highlighted, requiring a single click for acceptance by the salesperson.

Approval requests for special discounts are routed automatically to the correct decision-maker.

4. Financial & Project Management Integration:

Accepted quotes are converted into detailed Project Estimates with a single click.

API integration with existing accounting software (e.g., QuickBooks, Xero, SmartBill) to automate invoicing based on payment schedules (e.g., 50% advance).

We proposed a phased implementation to deliver value quickly and minimize business disruption.

Phase 1: Quoting & Product Core (Est. Duration: 4-6 weeks)

Activities: Import all product price lists, configure the quoting module, and set up user roles and permissions.

Outcome: The sales team can generate all new quotes through the new, efficient system.

Example Investment: A one-time fee, typically starting from €3,800.

Phase 2: Project Management & Financial Integration (Est. Duration: 4 weeks)

Activities: Connect the platform to accounting software, automate the creation of estimates and contracts, and build the project tracking module.

Outcome: A seamless operational flow from the initial quote to final invoicing.

Example Investment: A one-time fee, typically starting from €3,800.

Ongoing Hosting, Maintenance & Support:

Includes secure cloud hosting (AWS), daily backups, security monitoring, and user support.

Model: A predictable monthly retainer based on the number of users and data volume.

The system outlined in this diagnostic was not just a proposal — it was successfully implemented, transforming the client's operations from a state of organized chaos into a model of digital efficiency.

The project validated our core belief: a custom-built internal system, when designed correctly, provides an unparalleled competitive advantage that off-the-shelf SaaS products cannot match.

Experience the Solution for Yourself

We have created a public-facing, interactive demonstration version of this platform. Here, you can explore the complete workflow and experience the system from the perspective of various roles—from a Salesperson creating a quote to a Manager setting sales targets.

See how a unified system can transform your business.

Access the live demo at: <https://ambien.eu>

Ready to start a conversation about your own business processes?

Contact:

Andrei Roman

andrei@bijuterie.software

+40 720 382 421

Bijuterie Software SRL

