PTI
complexity made simple

Automating the Quotation Process through HubSpot <> Google Cloud Integration

CASE STUDY

Industry: Construction
Client: EVOTERM, Romania
Year: 2024

Evoterm is a company based in Cluj-Napoca, specializing in the production and installation of door and shading solutions for residential and commercial buildings.

Established in 2004, the company differentiates itself through a personalized and consultative approach, offering innovative and energy-efficient solutions. In this context, the quotation process is essential to their business needs.

To optimize this process, **OPTI** integrated HubSpot with Google Cloud.

CHALLENGES

The previous quotation process presented several issues:

1. MANUAL CREATION

Each quote required detailed customization based on the specific needs of the client and project. This manual approach was very time-consuming, slowing down response times.

2. POTENTIAL FOR ERRORS

Due to its manual nature, the process was prone to errors, both in terms of features and pricing.

3. LACK OF A CENTRALIZED PLATFORM

The quotation process lacked a centralized repository to store, track, measure, and report on the quotes.

4. EMAIL-ONLY QUOTES

Clients could only receive quotes via email, without access to a link for review and confirmation.

SOLUTION

OPTI implemented a solution that integrated **HubSpot's** CRM with a **Google Cloud-based** document management and generation system:

1. AUTOMATING QUOTATION CREATION

✓ A custom application was developed on **Google Cloud Platform (GCP)**, leveraging Google Cloud APIs (Drive, Docs, etc.) for document management, creation, and template handling.

2. HUBSPOT CRM INTEGRATION

✓ Relevant client data, including features, images, and other customized details, is stored in **HubSpot**, the most user-friendly sales and marketing CRM. Sales representatives input all necessary details for the quotation process directly into the CRM.

3. GOOGLE DRIVE AS A CENTRALIZED SYSTEM

✓ Generated documents are automatically stored in **Google Drive**, enabling quick and easy access for team members and client viewing.

RESULTS

Following the solution's implementation, EVOTERM observed significant improvements in several areas:

Time and resource savings

The time required to create a quote was reduced to **just a few minutes** per client.

Improved client communication

Quotes are now sent faster and more efficiently, enhancing client relationships.

Centralized system

All quotes are stored in a single location, streamlining management.

TECHNOLOGIES

Google Cloud Platform (GCP), API-ul Google Drive și Docs, integrare CRM

TESTIMONIAL

arthur

"OPTI is our main partner in web software development, web maintenance, and web hosting for our business. We highly recommend their software development skills, as our requests and inputs are quickly transformed into results, ensuring a short release cycle."

- Bianca Chirică, ARTHUR Publishing

CONTACT US

Direct	Socials
✉ office@opti-software.com	in opti-software
▥ +(40) 774 453 302	f optisoftit
🌐 **www.opti-software.com**	⊗ opti-software
Str. Dr. Ioan Nanu Muscel 4, București, România	

OPTI

PRODUCT DEVELOPMENT, AUTOMATION AND DATA MIGRATION

Software company developing products and cutting costs by automations and data migrations. Founded in 2005, with extensive expertise in retail, medical, publishing, and gaming industries.

The OPTI team includes senior analysts and programmers, is ISO 9001 and ISO 27001 certified, HubSpot Solution Partner, Google Cloud Partner and certified in other technological stacks.

CERTIFICATIONS

HubSpot Partner — SOLUTIONS PARTNER PROGRAM

Google Workspace Administrator — GOOGLE CERTIFIED · PROFESSIONAL

ISO 9001

ISO 27001

Google Cloud Partner

Microsoft CERTIFICATION CRM

Microsoft CERTIFICATION ERP

CISCO CCNP

CISCO CCNA

REVIEWED ON Clutch ★★★★★ 5/5 RATING

KNOW-HOW

Frameworks & Languages	JavaScript	PHP	Python	Java
	Rust	C#	React	Angular
	Typescript	HTML5		

Databases	PostgreSQL	Microsoft SQL Server	BigQuery
	Mongo	MySQL	Hadoop

ERP/CRMs	HubSpot	Salesforce	FreshSales	Microsoft Dynamics 365
	Zoho	Pipedrive	Zendesk	MiniCRM

Server Configuration	Linux OS	Load Balancers	HTTP Daemons