

Digitizing High-Value Bid Lifecycle Management in the Power Sector

About the Customer

A leading engineering and manufacturing enterprise delivers critical equipment and turnkey solutions for the power and process industries, including steam generators and boilers, steam turbines, heat exchangers, environmental systems, and Balance of Plant (BoP) and EPC services. Operating in large-scale EPC-led projects across power, oil & gas, and infrastructure sectors, it works within a tri-party model:

End Customer ↔ EPC Contractor ↔ The Organization

Enquiries move rapidly from technical evaluation to techno-commercial proposals, internal reviews, and leadership approvals- ultimately converting into a Letter of Award (LOA) or Purchase Order (PO) issued by either the EPC contractor or the end customer, depending on the contracting structure and scope ownership.

Challenges

The organization's enquiry-to-order execution was heavily email-driven, making high-value proposal cycles hard to manage at scale:

- Enquiry intake was unstructured (email as the primary channel) with timelines and requirements scattered across threads
- Techno-commercial proposals were complex, pulling inputs across cost, deliverables, plan, manpower, and material
- Approvals (incl. MD approvals) were bottleneck-prone due to limited visibility and non-standard routing
- Document explosion per enquiry (~20–25 documents) increased version risk and retrieval effort
- Status tracking and history lacked a single source of truth across teams



Our Approach

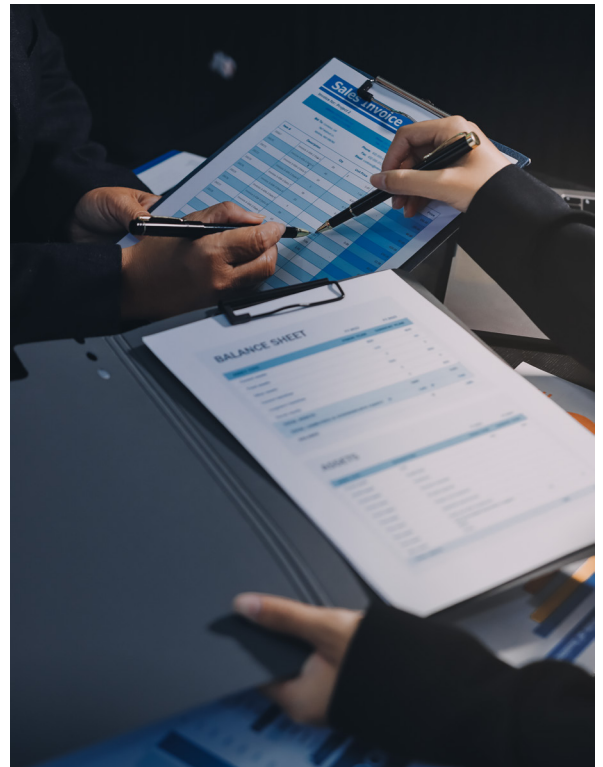
We implemented a structured Enquiry-to-Order (E2O) workflow to bring control, visibility, and traceability end-to-end:



- Centralized enquiry capture (from email + structured request intake)
- Opportunity classification & prioritization (including leads surfaced via newspapers, social media, and websites)
- Guided proposal workflow with defined ownership and checkpoints for techno-commercial readiness
- Digital approval routing with escalation and audit trail (including MD approvals)
- Document governance to manage high volumes with versioning and history tracking
- Real-time status visibility for teams and leadership—from enquiry to LOA/PO

Outcomes and Business Impact

- Single source of truth for enquiry → proposal: documents, status, workflow, and audit trail.
- NexDox enables integration of intelligent process orchestration for faster, predictable bid cycles.
- Approvals – role-based flows with RBAC: governed routing, escalations, and sign-offs.
- Lower risk via controlled access (RBAC), version control, and tracked history.
- Agentic AI accelerates drafting, routing, compliance checks, and follow-ups.
- Faster knowledge reuse using RAG & Lang chain for quick retrieval of past bids, specs, and clarifications.
- Leadership visibility into pipeline health, bottlenecks, and approval readiness.
- Better EPC/customer responsiveness through clear timelines and cleaner coordination.



AI Accelerator used

NexDox

Smart documentation management, customizable org-structuring, alerts, role-based access, and investor communication enablement