

CASE STUDY · SALES EFFICIENCY

An AI agent that turns pricing into proposals customers **sign**.

How Strong Tide AI helped CloudSAFE set the proposal standard first, then built the agent to run it, two weeks, before a dollar was spent on software.

CLIENT

CloudSAFE, a managed services provider built from seven acquired companies, with a partner-driven sales model.

ENGAGEMENT

Sales efficiency advisory with Strong Tide AI.

FOCUS

Strengthening how CloudSAFE produces customer proposals, and the AI agent that now does it.

01 The starting point

CloudSAFE sells complex hosting and managed services through a focused sales team. Salesforce CPQ holds more than 200 products and does its job on price. What it does not do is produce the polished, narrative document a customer wants to sign, so reps were building proposals from the company's contract library by hand.

That library was a real asset. CloudSAFE had invested in a solid set of standards: the RACI, the recurring and non-recurring service terms, the time-and-materials format, the backup and disaster-recovery language. The gap was that those standards lived in documents rather than in a system, so each rep reassembled them for every deal. Proposals varied, and reps spent time on assembly they would rather spend selling.

02 The approach

Strong Tide's view was that buying a tool before defining the standard would mostly speed up the inconsistency. The recommendation was to define the standard first, build an agent to run it, and treat a tool purchase as a later decision rather than the first one.

Strong Tide worked the problem with the people closest to it: the rep closest to the customer, the solutions lead who wrote the requirements, and the sales-ops lead who owned the systems. The raw material was already in their own notes. Lock the proposal standard, then let an agent do the assembly.

03 What we built

An AI agent that takes what CloudSAFE already has, the CPQ pricing, the deal's meeting notes, and the company's own contract library, and produces a finished proposal the way a good sales engineer would, in two stages.

STAGE ONE · THE BRIEFING DOCUMENT**A proposal the customer signs off on**

A clean narrative proposal built from the deal's meeting notes and the standard service language, with pricing pulled straight from CPQ.

STAGE TWO · THE STATEMENT OF WORK**On approval, priced and ready**

The agent drops that pricing into a locked, on-brand template, with the right terms and the standard RACI attached.

The judgment is in the agent, not the rep. Pricing comes only from the CPQ quote, terms only from the approved library, and anything missing is flagged rather than invented. Tested end to end on real deals across both hosting lines.

04 The outcome

CloudSAFE walked into its national sales meeting with a working agent, not a plan to buy one. The standard is now defined, so any future tool decision has a benchmark to meet. The payoff is direct: proposals that match the work behind them, fewer revision cycles, and more of each rep's time spent selling.

“Our proposals weren't doing our work justice. Strong Tide didn't sell us a tool. They sat with my sales team, understood how we actually sell, and helped us set the standard before we spent a dollar on software. Two weeks later we had an AI agent that turns our pricing and our own contract standards into a polished proposal. We walked into our national sales meeting with it built, not promised.

Doug McMaster CEO, CloudSAFE