$0.83 MILLION IN SAVINGS WITH NEAR TOUCH LESS TRADE PROMOTION PROCESS

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As a leading, and one of the largest consumer packaged goods (CPG) brand for over 181 years, this client of ours tries to make each day in the life of its end customer extraordinary. Serving nearly 5 billion consumers, over 180 countries, they've challenged convention, led innovation, and helped shape culture. With a legacy like this, their trade promotion process was really a sore point.
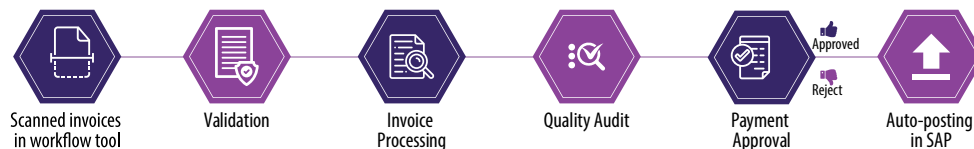
Setting up the trade promotion process for various brands involved a lot of backend administrative work including creating and allocating funds for promotions, setting up promotions, making payments to clients and generating reports – all of this required a lot of manual intervention. As a result, the sales and business development teams saw account executives losing a significant amount of their time here, as against investing it in growing the business for various brands.

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SOLUTION

Infosys ensured that the client is provided with transparency and control over trade funds by assisting the account executives at each step of the process, which had a wide variation across markets due to regional nuances.

Infosys identified that these processes were highly repetitive and implemented Robotic Process Automation (RPA) across trade promotion management. We implemented an Automation Anywhere bot that automated all the rule-based steps below:

Before Automation

Scanned invoices in workflow tool → Validation → Invoice Processing → Quality Audit → Payment Approval (Approved / Reject) → Auto-posting in SAP

The transition to the automated processes was achieved in a non-disruptive manner by leveraging a robust project management process to ensure operational stability.

This meant that a significant part of the process didn't require human touch anymore and looked like this:

After Automation

RPA scheduled to run in the background → 80% process steps are touch-free → Quality Audit → Auto-posting in SAP

FEATURES

Automation made 80% of the process straight through

- Automation Anywhere bot was used for automating all rule-based process steps

- Extraction and validation of tickets as per business rules was automated

- Bots were utilized for data massaging and posting in the system of records

- A robust project management process ensured seamless RPA implementation

- Automating the process ensured easy scalability to address larger volumes in the future

- Collaboration between the Infosys team was facilitated by a robust project management approach

BENEFITS DELIVERED

$0.83 million in net savings

- Automation of rule-based, backend processes led to 37% full-time equivalent (FTE)/ headcount reduction that delivered the above savings

- The operational window increased from 9 hours to 20 hours per day

- 80% of the process became touch-free with the automation of trade promotions processes, almost negating the chances of human errors

- Sustained accuracy enabled reduction in sampling percentage for audits

- Auditing made easy with user tracking logs

WE DID THIS FOR THEM.
WE CAN DO IT FOR YOU.

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