



A GLOWING PROCESS MAKEOVER FOR SALLY BEAUTY

Abstract

Sally Beauty Holdings, Inc., a leading global beauty products supplier, sells its CosmoProf branded products exclusively to licensed beauty professionals. However, Michelle Ruggles, Sr. Director of Customer Service at the company, found her team facing challenges in managing customer sign-ups given the manual effort and time-consuming nature of their processes. When Michelle approached Infosys BPM to find a sustainable business process solution that would improve customer experience, the results surpassed her expectations. This case study illustrates how Infosys BPM's comprehensive automation solution, powered by machine learning algorithms, reduced manual efforts from 100% to just 20%. This significant decrease not only minimised customer wait times but also greatly enhanced the overall sign-up experience.



A Beauty-full Change

Michelle Ruggles, Sr. Director - Customer Service at Sally Beauty Holdings, Inc., a leading retail distributor of professional beauty supplies. The company — operating primarily through two business units, Sally Beauty Supply and Beauty Systems Group (branded as CosmoProf) — supplies its products through ~4500 retail outlets across 11 countries including the US, Puerto Rico, and Canada. Michelle oversees Sally Beauty's customer experience operations and in this key role ensures seamless customer experience.

Sally Beauty's CosmoProf brand offers a large assortment of professionally branded products that are exclusively available to licensed beauty professionals. To sign up for a CosmoProf membership and gain access to these products, beauty

professionals need to upload their licenses and submit their professional information through the CosmoProf web portal.

For Michelle and her team, this would trigger a virtual sign-up (VSU) process involving a close review of the prospective new member's profile and credentials uploaded through the web portal to the company's CRM platform. The review process for each sign-up would take up to six minutes to complete; however, due to the manual and time-consuming nature of the other operations involved in the process, the applicant would have to wait up to two days for the entire verification process to be completed.

On average, Michelle's team received over 8000 such sign-ups each month, with the resulting manual efforts totalling up

to more than 48000 hours. Considering this, an automated solution became a priority for Michelle as she also wanted to improve the customer experience by delivering a faster process while keeping the operational costs in mind.

Michelle thus began seeking a comprehensive process transformation. She reached out to Amelia — a transformation manager with Infosys BPM with whom Sally Beauty Holdings had a partnership from 2021 — and placed her confidence in Amelia's team to manage the transformation program.

She outlined the challenges associated with VSU workflows and requested a strategic automation solution to minimise manual efforts, streamline processes, and reduce operational costs.

An automation-led process makeover

Understanding Michelle's requirements thoroughly, Amelia gathered her team to map out and analyse the existing processes in detail. They identified the most time-consuming and repetitive tasks, tagging them as prime candidates for automation. They then drafted a comprehensive implementation plan.

Initially, Amelia proposed a UI-based Microsoft Power Automate solution and began its implementation. However, she soon recognised that this approach would

not be sustainable in the long run. The solution required tight integration with the company's frequently changing CRM user interface, which would necessitate constant recalibration of the automation. Despite the potential effectiveness of the solution, it would demand a high level of maintenance, and consequently, the team decided to pursue an alternative approach.

After extensive brainstorming, the team created a low-maintenance yet robust solution using an API-based automation

approach. They employed machine learning algorithms and Azure Cognitive Services to achieve this, enabling the automation bots to communicate directly with Sally Beauty's CRM platform through API integrations. This streamlined the process of extracting beautician license details from uploaded images and allowed for the verified information to be updated directly in the cloud.

Approach summary



After obtaining Michelle's approval for the new solution, Amelia and her team began automating the sign-up process for CosmoProf. They utilised a MuleSoft application to automate the creation of cases for each sign-up and to send the relevant details to an automated bot. Additionally, they configured API calls that allowed the bot to automatically download

the beautician license photographs uploaded by applicants to the CRM cloud.

The bot would then employ machine learning algorithms to process the license images with minimal manual intervention, while Azure Cognitive Services would extract data from the processed images and convert it into a JSON format.

Following this, the bot would make further API calls to the CRM to verify the processed and formatted license details against information provided by the licensing authorities. Finally, if the professional's license credentials were validated, the bot would automatically update the CRM with the verified customer information.

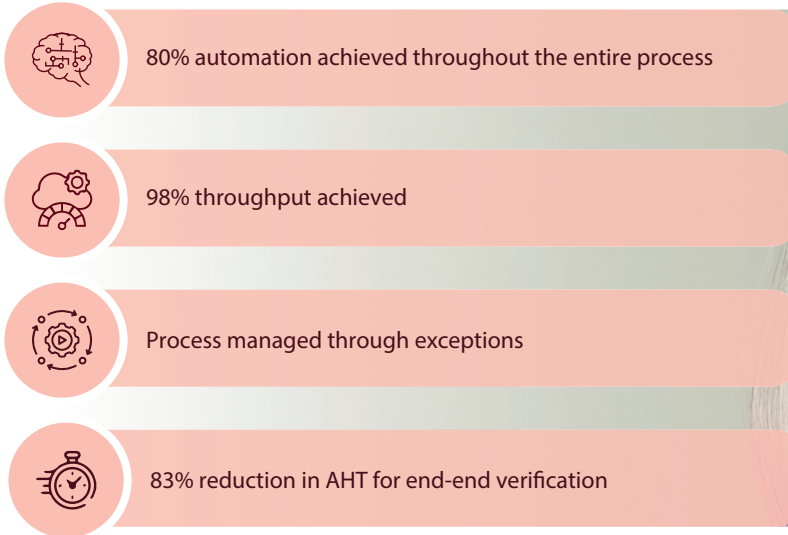
A thing of beauty is a joy forever

With the Infosys BPM team's innovation and diligent implementation efforts, Michelle experienced a significant improvement in her workflow that automated most of the

steps involved in the customer sign-up process. The new bot not only brought down the manual efforts significantly from 100% to just 20%, but it also enabled

faster data processing and extraction, greatly optimising Michelle's teams' overall productivity.

Key benefits



To Michelle's great relief, Amelia's process standardisation during the automation implementation reduced the average handling time (AHT) for each VSU case from 6 minutes to just 1 minute. This significant reduction decreased the wait time for customer signups by over 55%. Additionally, the overall average case

age was reduced by over 20%, from ~30 hours to ~11 hours. The entire automation solution maintained 100% accuracy throughout the verification, validation, and credential review processes. It also proved to be sustainable, requiring minimal maintenance despite frequent changes to the company's CRM user interface.

Over time, faster case processing, a smoother VSU process, and simpler workflows enabled Michelle to reduce her staff headcount by four while significantly improving customer satisfaction levels at Sally Beauty. The successes of the automation project demonstrate that a beautiful process automation makeover never goes out of style!

**This project involved multiple team members at Infosys, therefore, to be fair to all, a proxy character name has been used on the Infosys side.*

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