Robots Deliver Savings in the Trade Promotions Process of a Leading Consumer Packaged Goods Company

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Abstract

Infosys BPM used robotic process automation to eliminate the repetitive, manual-effort intensive tasks that were part of the trade promotions processes it managed for its client, a leading global CPG company. Read on to know how the automation not only simplified the processes and eliminated errors, but also delivered an appreciable savings in costs for the client.

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The Client

The client is one of the world's largest consumer packaged goods (CPG) companies serving nearly 5 billion consumers across the globe, through its brands which are sold in over 180 countries.

The Business Challenge

The client's sales and business development teams have account executives who service the needs of retailers and are responsible for promotions of branded products in the market. Setting up these trade promotions, requires account executives to perform a significant amount of backend administrative work. This eats into a substantial part of their day, which otherwise would have been spent growing the business.

As part of the business process management services Infosys BPM provides to the client, the trade promotions management services team at Infosys BPM processes several maintenance and administrative tasks for the account executives. These include creating and allocating funds for promotions, setting up promotions, making payments to clients and generating reports which give the client management better visibility and control over trade funds.

The fund management, promotions set-up, and payments processes involve downloading tickets from a web-based workflow tool, performing validations and updating the data in the system of records. Often, these processes have a wide variation across markets due to regional nuances. Further, because these processes were highly repetitive and involved a high degree of manual effort, the process was prone to errors.

Our Solution

To reduce manual effort, and to eliminate repetitive tasks and errors, Infosys BPM implemented robotic process automation across all key processes in trade promotions management. The project team used the Automation Anywhere task-bot for automating all rule-based process steps.

The key process activities Infosys BPM automated were:

- Extraction of requests from the ticketing solution
- Validation of extracted tickets as per defined business rules
- Data massaging and posting in the system of records, including:
  - Master data maintenance for customers and vendors
  - Fund creation, adjustments and transfers
  - Promotion creation and modifications
  - Creation of payment headers and modifications
  - Generation of summary reports at the end of the runs, to highlight the manual intervention required in any part of the process
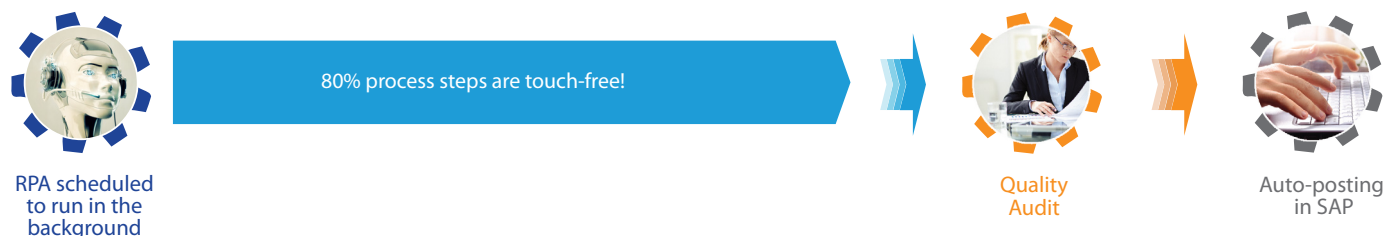
Project teams for both the client and Infosys BPM collaborated using a robust project management drumbeat to ensure operational stability and a noiseless transition to the automated process.

Robotic Process Automation

Before Automation

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

After Automation

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

Benefits Delivered

Post implementation of robotic process automation, the bots manage the automated trade promotions processes in a touchless manner. Over 80% of the process is straight through, and the operational window has increased from 9 hours to 20 hours per day.

$ 0.83 million
net savings

37% FTE
reduction

Noiseless transition with operational stability maintained

Opeational window increased from 9 hours to 20 hours

From the client's perspective, the automation led to a 37% reduction in headcount, delivering net savings of $ 0.83 million.

Robotic process automation also led to several other benefits such as sustained accuracy enabling a reduction in the sampling percentage for quality audits, provision to easily scale the process to handle future increased volumes, and user tracking logs for ease of audits.

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