



# TURBOCHARGING TRADE PROMOTIONS: EFFICIENT, QUICKER, AND OVER \$4 MN RICHER

## Abstract

Mary Jones, Program Manager at a global consumer packaged goods (CPG) giant, partnered with Infosys BPM to overcome two critical challenges – prolonged time-to-market and the lack of ability to effectively track and report business processes interactions. This case study highlights how Infosys BPM's technology-led approach helped Mary and her organisation reduce days sales outstanding (DSO) by over 65% and enhance efficiency by 35x, resulting in operational costs by over \$4 Mn and much more.



## The imperative for insights

Mary Jones is a Program Manager at a leading global consumer goods company. The company, managing over 70 brands across more than 180 countries globally, operates in over 80 countries. Mary leads the trade promotions business unit, serving the company's vast global customer base.

Despite Mary's best efforts, several key roadblocks prevented her organisation from achieving best-in-class service quality. The business processes lacked visibility into the transaction status of customer promotions. Consequently, managing operational requirements and facilitating communication between the sales teams and trade promotions service advisors consumed ~30% of her team's capacity.

Her team was burdened with tasks such as researching, communicating, clarifying, and performing quality checks. This resulted in lack of efficiencies that led to low operational outcomes, reduced transaction accuracy leading to rework, and a high lead time exceeding 48 hours – far from the ideal of under 2 hours.

Following the pandemic, beginning in December 2020, Mary saw an exponential increase in demand for various products (SKUs), leading to a significant surge in trade promotion volumes globally. Efficiently managing this increase was critical, as failing to meet the company's essential trade promotion activities could result in substantial financial losses. While

Mary had solutions available, they were fragmented, increasing the time-to-market and substantially raising the cost to serve, thus proving inefficient and sub-optimal in addressing the heightened demands promptly.

Mary needed to present a solution to the board that could navigate this situation in an operationally efficient and cost-effective manner. The key challenge was enabling promotions within the stipulated time while maintaining high-quality service and excellent customer experience. With this understanding, Mary began seeking a robust solution that would meet market demand, control costs, and uphold the highest quality standards.

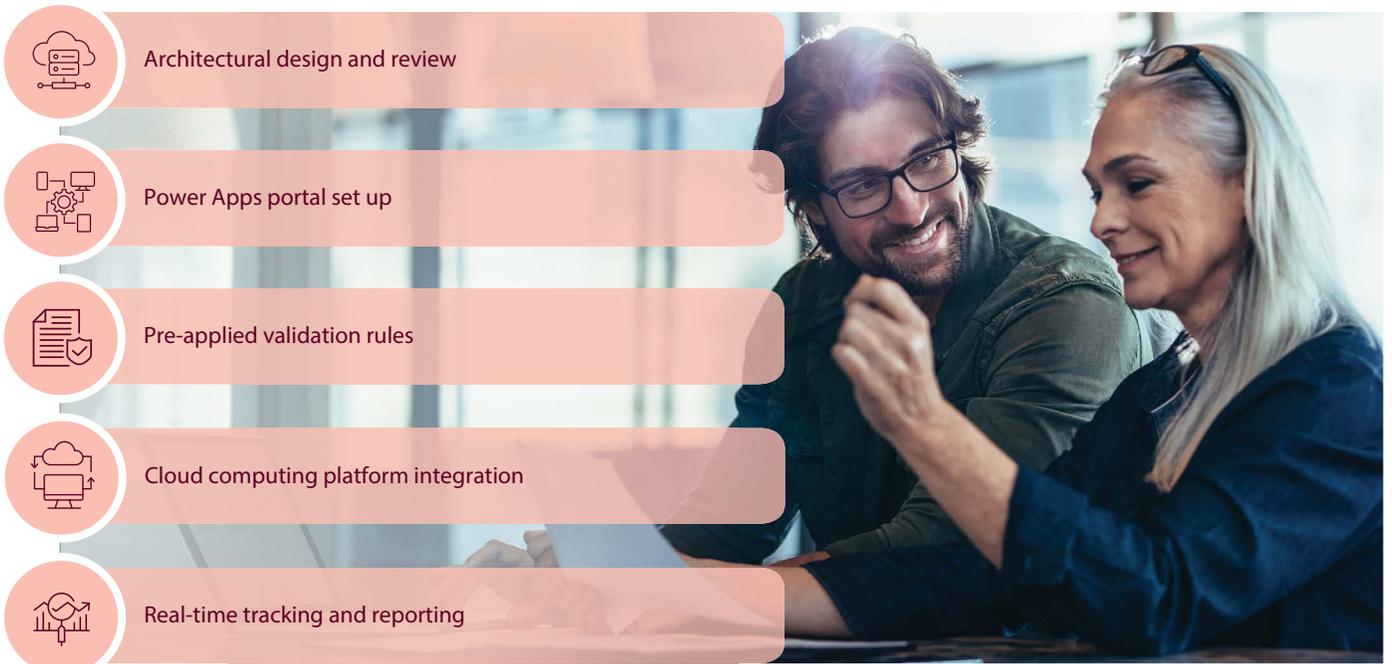
## A technology-led, focused approach

Infosys BPM has a long-standing partnership with the consumer goods giant since 2007, evolving into a true shared service centre

of excellence (COE) serving multiple key business functions globally. Aware of this strong relationship, Mary reached out

to Clark Maxwell, the trade promotions domain lead at Infosys BPM.

## Approach summary



In January 2021, Mary and Clark conducted multiple brainstorming sessions to devise potential solutions, identifying gaps and limitations in each option using SWOT analysis. Clark assembled a team of domain experts to redesign Mary's business processes. He recommended integrating an application programming interface (API) in the CRM system to substantially reduce processing time without compromising quality. Excited by the possibilities, Mary wanted to explore further.

Clark proposed creating a web-based portal using Microsoft Power Apps to leverage the API functionality for real-time transaction processing within the CRM system. With an existing subscription to Microsoft Azure services, Mary could

provision the necessary infrastructure swiftly. The team designed a Power Apps portal to enable the customer teams to input their requests, converting them into service requests for seamless business process execution.

To ensure 100% data accuracy, Mary and Clark implemented an automated data validation template to prevent erroneous inputs. They integrated a cloud computing platform with the portal to generate workflows and request tickets upon details submission. API calls were triggered to communicate with the CRM system, and success or failure notifications were sent to Mary's team via automated emails from the Power Apps portal.

During the design phase, Clark encountered a roadblock as the company's existing subscriptions lacked the required intelligent and scalable database license, risking a 3-month delay in implementation. To mitigate this, the team redesigned the architecture, replacing the database with a SharePoint list, reducing overall infrastructure cost. By July 2021, all necessary documentation for deploying the robust solution was completed. Clark ensured scalability by using the right technology stacks, and the portal was further connected to a Power BI dashboard for real-time tracking and valuable insights.



## Enhanced trade promotions

This solution proved to be both optimal and scalable, processing 7k promotions per day – 35x higher in efficiency – while substantially reducing the cost to serve.

### Key benefits



The innovative solution boosted the current capacity by 80%, maintaining quality and cutting operational costs. The days sales outstanding (DSO) saw a significant improvement of over 65%, decreasing from 3 days to less than a day. With centralised and standardised processes across markets, Mary was able to

ensure 100% service quality. Collectively, these enhancements saved her organisation \$2.55 Mn in operational costs. This solution was subsequently expanded to additional markets across multiple regions, allowing Mary to streamline her team and further reduce operational expenses by ~\$1.35 Mn.

Mary received commendations from senior leaders for delivering a truly scalable solution with substantial multi-fold benefits. This is how Infosys BPM provided the consumer goods giant with a high-impact, high-delivery solution.

*\*Names have been altered to preserve the identities of the people involved.*

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