



GETTING A BLUEPRINT FOR MASTERFUL TRADE PROMOTIONS

Abstract

Donald Richards, Global Process Owner of Order-to-Cash processes at a \$50 Bn American consumer goods manufacturer, was concerned about the high costs and extreme fragmentation of the company's trade promotion operations. Needing a blueprint to overcome the challenges, he turned to Infosys BPM for consulting support. This case details how Infosys BPM assessed the as-is operations and developed a three-step transformation roadmap that set Donald up for a significant 50% release in FTEs, 60% reduction in AHTs, and 25% gains in efficiency.



A jack of all trade promotions

Donald Richards is a Senior Director at a \$50 Bn American consumer goods manufacturing company, serving as the Global Process Owner for the company's order-to-cash operations. With the primary responsibility to lead end-to-end process design and transformation, Donald collaborates with various business segments to standardise their order-to-cash processes, drive efficiency, and accelerate the working capital. However, over time Donald realised that the company's operations had a major gap which needed his immediate attention.

The CPG giant ran a large number of trade promotions in the regions spanning its retail and distribution network, with the objective of pushing specific products and driving higher sales. While a tried-and-tested strategy for increasing revenue,

these trade promotion operations were costing the company more than what Donald was happy with. When he went on to review the operations and see where the money was going, he was met with highly unharmonised processes with no continuity across regions. These fragmented workflows made it almost impossible for him to gain the visibility he would need to assess the trade promotion operations and the reason behind its rising costs.

Yet, even upon identifying these challenges, Donald realised that he did not have the capacity or the resources to plan and take appropriate corrective measures. What he needed was a clear blueprint for revamping the company's trade promotions operational model with a productive digital transformation

exercise. But with the operational costs nibbling down at the working capital with every passing day, he knew he had to act quickly and immediately sent out a global RFP calling out for business transformation consulting support. After reviewing the numerous responses he received, he decided to sign on Infosys BPM for the project, based on its consistent track record of carrying out successful business transformation projects. He then set up a meeting with Meghna Varma, the Infosys BPM Project Lead, where he walked her through the processes, highlighted the widespread fragmentation, and enlisted her support for a comprehensive process evaluation and remedial recommendations.

Chalking out a blueprint for efficiency

With the project brief clear, Meghna rounded up her team of experts and immediately got to work. To start off, the team conducted an in-depth assessment of the company's trade promotion operations across different sites. They mapped out the workflows and studied the variations in detail, identifying key geo-specific operational challenges that

were bogging down the processes.

Then, with a clear understanding of the inconsistencies and variations across regions, the team worked to evaluate the scope of process standardisation throughout the company's trade promotion operations. Together, they highlighted the opportunities for

standardisation and identified shifting to a hub, spoke, and edge operating model as an ideal strategy for saving costs, managing risks, and enhancing service quality. Meghna presented these findings to Donald, painting a clear picture of how the shift could be extremely beneficial to the company.

Approach summary



The team then sat together and developed a detailed list of transformation initiatives that Donald could undertake for maximising process efficiency. They bucketed the transformation initiative under a three-step approach of service, process, and digital.

For the service transformation, the team charted out a plan for their proposed hub, spoke, and edge model, along with an action plan for centralising all reporting and analytics activities. Next, they focused on driving process

transformation with domain-led initiatives. For this, they proposed utilising a standard nomenclature in the trade promotion check books. The team also detailed how logging expenses across channels under uniform categories of internal costs and fixed costs could make tracking financials across regions simpler. In addition, Meghna made recommendations for planning and maintaining capital investment logs at a sub-account level, while setting up a procedure for reviewing the post-analysis learnings in a consolidated way. The team

also highlighted the key KPIs and SLAs for Donald to track and manage the operating performance.

Lastly, Meghna and team also set up a clear roadmap for driving digital transformation with strategic process automation across the company's manually intensive activities. This included both — a short-term robotic process automation plan for quick-wins, and an elaborate blueprint for a large-scale automation with CRM and TPM tools.

A master of all trades

With Meghna and her team's elaborate three-step transformation roadmap, Donald finally had a clear, actionable strategy in place for reshaping the

company's trade promotion operations. Along with this, he also achieved end-to-end visibility into the existing processes, its challenges, and the potential scope

for process standardisation and digital transformation.

Key benefits



20-25% efficiency gains identified



40-60% potential reduction in AHT



>50% potential FTE reduction identified



20% of time savings for sales team



80% automatic processing of trade promotion requests



As per Meghna's analysis, the roadmap had set the company up for direct efficiency gains of 20-25%, along with a number of operational advantages. The process standardisation and automation, for starters, could itself lead to a 40-60% reduction in average handling time for routine tasks, resulting in a potential release of over 150 staff (over 50% of the existing headcount). Additionally, the

quick-win RPA setup could potentially enable the company to process 80% trade promotion requests automatically, driving greater productivity throughout the operation. Finally, the proposed re-engineering of roles and responsibilities could deliver 20% time savings for Donald's sales team.

Donald, impressed with these outcomes from the consultation, expressed

his gratitude for Meghna and her team's efforts and applauded their comprehensive approach. With their digital transformation blueprint, he is now all set for a successful overhaul of his trade promotion operations, which makes it safe to say, the consulting partnership has been a great trade for the CPG giant!

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

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