



STIRRING THE POT FOR A TASTY BREW

Summary

When Stephen Astle, Executive Global Business Leader for an American confectionary and dog food company, wanted to revamp the administrative processes, Infosys BPM stepped in to improve efficiencies, effectiveness, and experience in the end-to-end trade promotion processes and significantly reduced time spent on manual activities by the sales team to the tune of 15–20%.

The visible roadblocks

Stephen was aware that the existing capabilities of the company was unsatisfactory vis-à-vis the competitors as well as below industry standards. He also noticed that trade expenditure had a direct impact on customer relationships as well as the topline, with process quality and accuracy being the critical elements for the overall financial performance of the company. He was concerned that the scenario would deteriorate further as the market accelerates towards digitisation. With the ever-changing demands of the global market, Stephen realised that digital transformation will be the key in ensuring that the company becomes a global leader in the sector. To that end, his vision could only be realised with a futuristic global business services (GBS) operating model and a transformation roadmap.

Trade promotions has become a key marketing technique in every organisation aimed at increasing demand for products based on special pricing, display fixtures, value-added bonuses, no-obligation gifts, and more. Stephen knew existing trade operations (including trade promotions management) was a highly complex, manually intensive, and fragmented process across the client organisation, with disparate tools, processes, and frameworks, which have been developed from a 'bottom-up,' local operational level. In addition, there were no standardised data capture processes as well as lack of regional or central governance practices in place. This meant that Stephen had extremely limited transparency and understanding of the performance (KPIs) of the process.



The path towards resolution

Approach summary

- Collected data using templates and targeted interviews with different personnel in the value chain (finance, sales, supply chain, etc.)
- Performed an as-is assessment of the processes
- Designed the to-be future state operating model consisting of different elements such as people, process, and technology
- Conducted value assessment and provided a roadmap



Stephen's journey to the optimised transformation program needed to start with identifying opportunities for setting a standardised foundation for future growth along with proper governance. Stephen's search for the right vendor on this transformation journey started with Infosys BPM. The vendor had developed a strong partnership with Stephen and his company by centralising the finance function. As such, Stephen knew that the vendor had the right capability and the experience to have a consulting engagement to aid them with the opportunity identification

exercise. Nathan, the client manager for the vendor, and Stephen decided to have an end-to-end trade management process consulting exercise to address the need to have a futuristic global process design in implementing the global process (with flexibility for governed regional variations). This would serve as the central pillar for all trade activities happening concurrently, building a foundation for standardised ways of working across the end-to-end trade operations.

Domain and transformation consultants

from Infosys BPM, using the proven Assess-Design-Establish (ADE) framework, assessed the as-is situation for Stephen and identified the opportunities for centralisation, standardisation, and digital solutions for end-to-end transformation of trade operations. Nathan and his team recommended a renewed futuristic target operating mode and provided a high-level business case, which detailed the cost-and-benefits analysis. The team also demonstrated an industry point of view on the trade promotions management from an outside-in perspective.



Project outcomes meet program objectives

Stephen and his team presented the recommendations to the steering committee. During the project, Nathan and his team of domain experts created a base process taxonomy till level 5 (list of tasks in different activities involved in the trade promotions management including the personas against each task) for the client's end-to-end trade

promotions management processes that helped in identifying opportunities for centralisation, standardisation, and digital transformation. The team identified admin efforts from sales account managers and other personas involved in the trade promotion processes including promotion planning, promotion execution, financial management, and post event analytics

processes. The team also identified opportunities for standardisation and simplification of processes through a workflow solution and a dashboard to depict the near-real-time view of the KPIs and promotion performance, automation (RPA), transformation, and continuous improvements, with ~15–20% overall efficiency improvements.

Key benefits

- Identified opportunities for centralisation (up to 30 FTEs)
- Identified opportunities for freeing up sales teams' time by relieving them of admin-related activities and improving customer-facing time
- Increased promotion compliance through robust checks and balances



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

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