



Contract Assistant

CASE STUDY

An intelligent new trade promotions system for a CPG giant

How AI makes contracts and invoicing painless—and delivers insights, to boot

WHO WE WORKED WITH

A major North American food company.

WHAT THE COMPANY NEEDED

Transform the manual trade promotion process to improve visibility and governance. The way forward was to have a centralized repository providing an audit trail of trade contracts, invoices, and trade promotions performance.

HOW WE HELPED

We deployed Contract Assistant—our product based on the AI platform, Genpact Cora—to automate the trade promotion process end to end.

WHAT THE COMPANY GOT

A future that will boost governance and visibility while driving productivity improvements, growth in margins, and actionable insights from performance data.

CHALLENGE

Automate manual trade promotions processes that are vulnerable to errors

As one of the largest CPG companies in the world, our client relies on retailers to execute much of its marketing strategy. In fact, it contracts with more than 150 large retailers to carry out over 300,000 transactions totaling about \$2 billion annually. Retailers claim back a portion of the promotion costs they incur, and in the past the CPG company created manual contracts based on sales input.

It validated each claim and invoice prior to approval, but it wasn't practical to audit more than 30% of invoice value—and that led to significant over-payments. What's more, there was no centralized information repository, so it was difficult to assess performance or to plan promotions based on analytics.

Although the company had already optimized its existing trade pay process, the system was ripe for AI automation. But no off-the-shelf solutions could do the job.

SOLUTION

Touchless automation with Genpact's Contract Assistant

Genpact's Contract Assistant uses built-in artificial intelligence to extract, analyze, and reconcile contracts with a high degree of accuracy. It applies computational linguistics, pattern recognition, and machine learning to extract contract terms and validate them against invoices and other data.

The Genpact team used a structured assessment process to adapt this solution to our client's specific trade promotion requirements. Key steps included:

- A business readiness assessment for the deployment of digital tools
- A recommended target operating model, governance model, and implementation plan
- A 10-week proof-of-concept exercise that automated the trade promotion process for two retailers

We used the Genpact Cora platform—and a holistic end-to-end approach—to automate each part of the process. Genpact Cora features a modular, interconnected mesh of technologies that tackles each business challenge and automates the following steps.

- **Contract creation:** The system receives promotion information from an online portal, interprets the information, creates a contract, reviews it and finalizes it.
- **Trade pay:** The system receives each customer invoice, extracts data from it and its associated contract, and interprets this information to identify validation criteria.
- **Proof of performance:** The system retrieves third-party market research data (from a separate application), performs price and quantity validation, and uploads the contract, invoice, and compliance template.
- **Payment:** On successful three-point validation, the system triggers payment.

Our proprietary data extraction, pattern recognition, and language correction capabilities helped overcome input issues such as poor-quality scans and damaged documents. That minimized exceptions.

In the end, we successfully demonstrated how the system would not only improve efficiency and accuracy, but also how the new centralized data repository would support

predictive analysis. Even better, machine learning means the system will improve continuously.

IMPACT

AI that provides a competitive advantage

Following the successful proof-of-concept phase, our client is going forward with a view to revamping the entire trade promotions process. Our modular approach means

the deployment will go live in short phases for rapid ROI. Expected business benefits include:

- Incremental productivity gains across the end-to-end process
- Increases in net revenues resulting from a more effective three-point payment validation process

As well, our client will acquire a leading-edge data repository for assessing the performance of individual promotions. And that means it will allocate marketing resources more efficiently. It's a win-win all around.

ABOUT GENPACT

Genpact (NYSE: G) is a global professional services firm that makes business transformation real. We drive digital-led innovation and digitally-enabled intelligent operations for our clients, guided by our experience running thousands of processes primarily for Global Fortune 500 companies. We think with design, dream in digital, and solve problems with data and analytics. Combining our expertise in end-to-end operations and our AI-based platform, Genpact Cora, we focus on the details - all 90,000+ of us. From New York to New Delhi and more than 30 countries in between, we connect every dot, reimagine every process, and reinvent companies' ways of working. We know that reimagining each step from start to finish creates better business outcomes. Whatever it is, we'll be there with you - accelerating digital transformation to create bold, lasting results - because [transformation happens here](#).

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