AUTOMATION PLAYBOOK

Consumer Packaged Goods (CPG)

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1. PREFACE

Automation is in the air. It is the topic of animated discussion at every meeting, conference and seminar. As many as 90% of the world's most influential companies—those in the Fortune 500—are investing aggressively in automation, creating bots for everyday tasks. Other organizations want to emulate the leaders and are keen to move from experimentation to the application of bots at scale. The goal is to boost Customer Experience, Employee Experience and Product Experience. But bot adoption in the automation space remains low. On the other hand, research shows that savings from chatbots and intelligent virtual assistants alone in just the retail, e-commerce, banking and the healthcare sectors will be US$8B by 2022.[i] Clearly, organizations are not going to continue to eye automation from a distance. Action is around the corner. The question is: Where does one begin the automation journey?

Let's reframe that question: What can I do with automation that brings the highest ROI? The answer to that question provides a clue to where your automation journey should begin. In terms of how industry is applying automation, we see that 63% of the organizations implementing automation have done it to improve their finance function while 75% are using it to boost contact center efficiency, HR, IT and Procurement processes. Within these functions, it boils down to understanding and solving problems (see Figure 1.0 that shows the major triggers for automation) to deliver efficiency, effectiveness and experience. We'd say that automating those areas that impact customer experience should take precedence, followed by tasks that have high volume, are speed sensitive and have irregular labor demand.

For many organizations, automation has become a key component of their digital transformation initiatives. It has become part of the social, mobile, data and analytics mix.

However, the truth remains that many organizations are struggling to adopt automation. One FMCG organization identified 10 use cases that it wanted to automate. An examination of the 10 use cases showed that only 6 were candidates for automation. However, those six processes could not be automated – for the simple reason that they were not templatized for use across the organization and needed to be standardized first. There are two ways to look at this: The organization failed to adopt automation, or the organization learnt and is now better positioned to leverage automation.

There are many reasons why automation has been slow in making its way into the technology mix of organizations. It is important to understand why this is so. This document dives deep into the CPG industry processes, challenges, and the potential areas for automation. This document should serve as a ready reckoner for the practitioners to understand where, and how to start their automation journey.

Happy reading!

[1] https://www.finextra.com/blogposting/14691/juniper-research-cost-and-time-savings-from-chatbots

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2. CONTEXT OF THIS DOCUMENT

This document captures the core processes across a CPG value chain and assesses the challenges faces and opportunities to improve through automation. The content of this document is based on the latest trends demonstrated by different industry players, across geographies and has been normalized to present an inclusive view.

This document establishes an industry view of where automation can be leveraged to potentially improve the performance and efficacy of the process. It is of relevance to the following roles: -

- Industry leaders (decision making capacity, influencers) looking to evaluate automation as a means of boosting operational efficiency and human potential
- Sales and Business Development teams looking out to understand and set up preliminary conversations to address client's pain points
- Onboarding resources who are new into automation and industry knowledge

3. TRENDS IN CPG INDUSTRY AND RELEVANCE OF AUTOMATION

The CPG industry is likely to see a major right shift in the ways of doing work owing to the rise of digital channels. According to a report by McKinsey, less than *5% of the CPG sales* is online. E-marketplaces like Amazon, Alibaba are growing at an immense pace as the lion's share of their users are global millennials and baby boomers who have a large connected 'market' open to them for consumptions in the years to come. For the top 10 eCommerce markets, online sales are expected to surpass *$108 billion*. While this trend is likely to mark a milestone for the retail industry, the CPG industry is also likely to see a positive shift due to this. How will this impact? – it will lead to changes in their distribution media and channels.

A recent study shows that the need for physical and manual skills will decline significantly, while the need for technical skills will intensify.

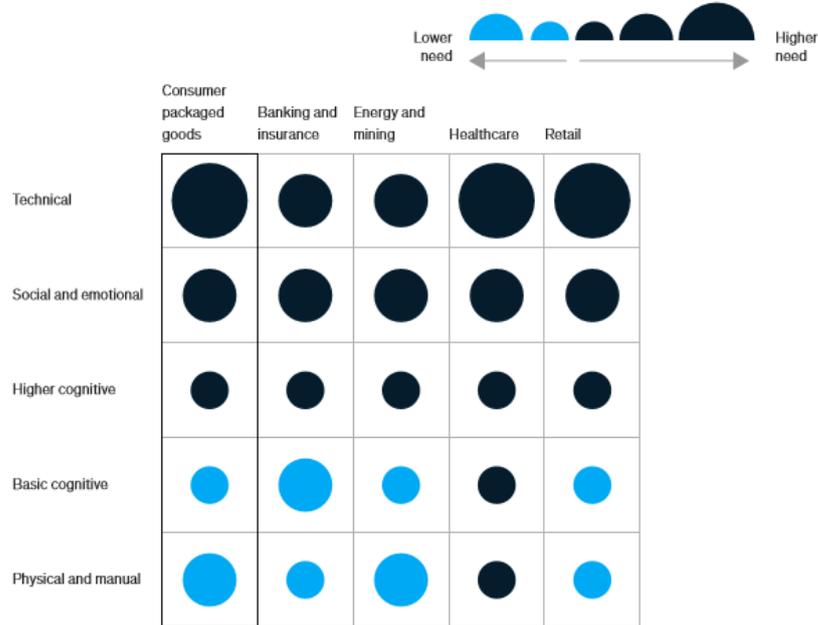**Expected shifts in industries' skill needs by 2030, Western Europe**

Fig 1.0 – A study by McKinsey Global Institute shows the skill modelling for resources working in the CPG

Major focus being on technology, the ask for technical skills is likely to increase which means greater wage payouts for High Skilled Resources. How does the industry plan to strike a balance between rising wages and costs thereof?

A study of occupations across US CPG businesses have determined that close to 40% of the tasks undertaken are automatable: -

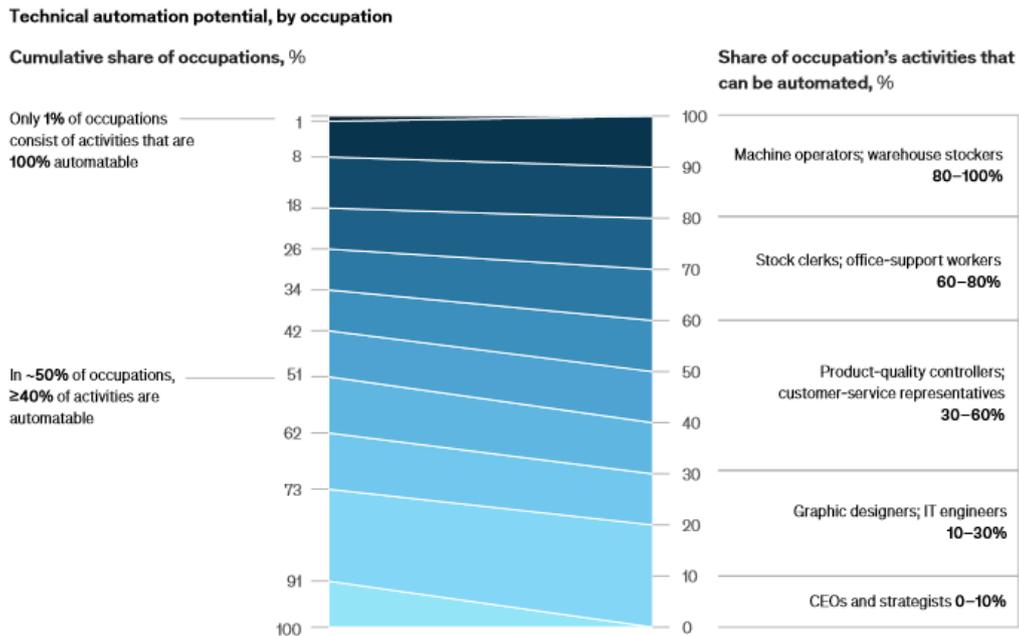
Technical automation potential, by occupation

Fig 1.1 – A study by McKinsey Global Institute shows the skill modelling for resources working in the CPG

Rising costs for resource management is one aspect of the investments that CPG industries are looking at. Other factors that impacts the enterprises are: -

- Cutthroat competition – price wars
- Rising tariffs
- Cost of fulfilling resource and talent gaps
- Changing global economy and buying capacities of consumers
- Evolving persona of consumers
- Complexities in integrating supply chains
- Low barriers of substitution in most cases

Having said this, for enterprises of varying scales of operation the pressing questions that arise are: -

- Where to start off in a labor intensive and operationally complex set up?
- How to plan for a positive operational and psychological impact?

With all these factors playing a critical role in the performance of the CPG businesses, the Strategy Leaders will need to find a way to combat soaring costs and drive sales.

While CPG players based in the US are majorly driving the sales globally, they are also facing stiff competition from emerging markets :-
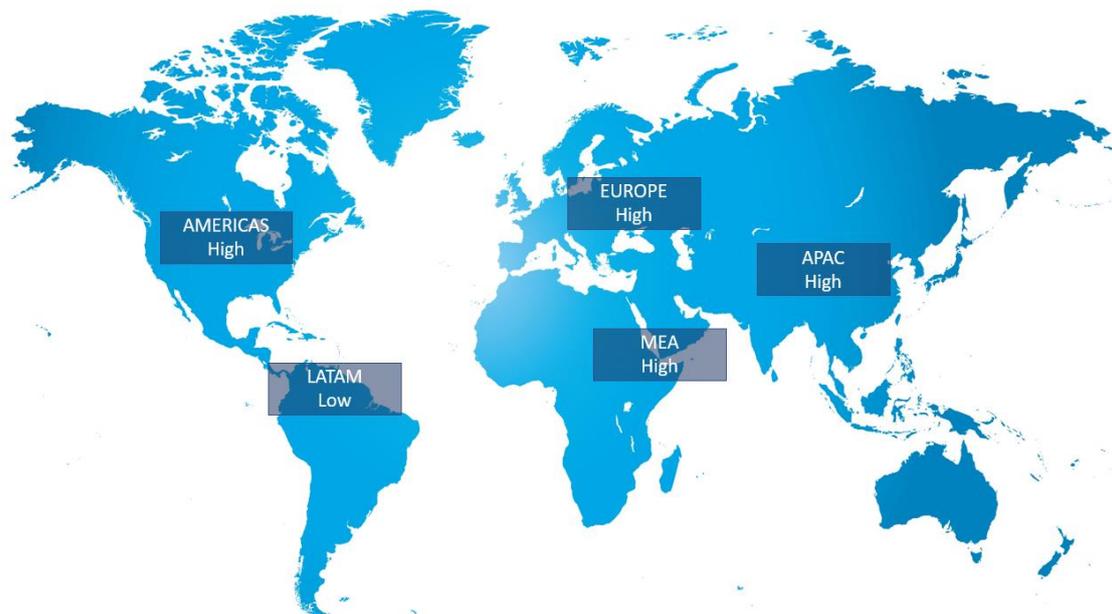

Fig 1.2 – CPG Sales Drivers

Being driven by high consumer expectations and the need for continued brand loyalty, one way to remain customer centric yet operate profitably is to harness emerging technologies to: -

- Enhance connected customer experience
- Build integrated production and supply chains to minimize overheads
- Drive profit potential through optimal zero-based budgeting across functions
- Reduce redundancies and streamline processes across the value chain
- Maximize the utilization of data generated by the industry

4. AUTOMATION ACROSS THE CPG VALUE CHAIN

Changing consumer trends and evolving technologies are making it vital for companies in the CPG industry to stay abreast with the developments and uncertainties in the market. Over the past few years, rapidly evolving technologies, consumer demographic shifts, and changing consumer preferences have transformed the CPG industry. Going forward, the growth of CPG companies will be centered around Supply chain optimization, Sustainability measures they undertake, Vertical integration & Business model evolution, and more importantly Cost leadership and Consolidation across the value chain.

	Plan	Buy	Make	Move	Market	Sell	Enable
Roles	Demand Planner, Production Planner, Supply Chain Planner	Category Manager, merchandising manager, New Product Designer, Merchandising Business Analyst, Testing Officer	Production Manager, Material Manager, Operations Manager, Quality control Specialist, Purchase Manager	Logistics Manager, Warehouse Manager, Shipping specialist, Merchandise pickup and Receiving associate...	Marketing Executive, Campaign Manager, Channel Marketing, Content Marketing Manager, Product Marketing Specialist...	Retail Sales manager, Institutional Sales manager, Brand Manager	Finance Analyst, Recruiter, HR Manager, Payroll Manager, IT Manager, Customer Service Manager, Facilities Manager
Systems	Analytical tools, Visualization, Strategic planning tools, Collaboration tools, Finance management system	Merchandising planning, Space Planning, Visual Merchandising, Customer behavior insights, Shelf management, Pricing and promotions, Replenishment planning, VMS	Assembly line, MRP, Industrial design, SCM, PLM, CAD/CAM, SQA, MES	WMS, TMS, ERP, Reverse Logistics, Inventory Management, Logistics Analytics	Campaign/Lead management, Content management, CRM, Trade marketing	ecommerce site, mobile sites, social commerce, aggregator sites, OMS	Front Office tools, Risk, AML system, Enterprise Project management, ERP, HRMS, ITSM tools, Analytical tools
Inputs	Market trends, Historical demand/consumption reports, Production capacity, Pre-S&OP, Trade Promotions, Market Expansion plan	Demand plan, Product information, Historical assortments, Consumption reports, Ethno-graphic purchase demand, Consumer behavior, Sales data by SKU and Account	MFG Schedules, Line availability, Production Plan, Material availability, FG stock report, Quality control plan, Product specs	Inbound Orders, Dispatch plan, Shipment plan,	Ad spend plan, Promotion Schedules, Supplier scorecard, Product wise sales plan, Budget approvals	Inventory availability, Production plan, Sales Forecast, Financial Plan, Market plan	Resource requirement, Asset management, Staff reports, Customer issues, IT tickets, Contract Documents
Outputs	Demand plan, Forecasting, S&OP, Rough cut capacity plan, Capital expenditure plan, Annual Budget	Category plan, Product procurement plan, Product promotion plan, Material requirement plan, Account level sales, SKU and account level price and Promotions	Finished goods, Test and inspection reports, Production record	Outbound orders, Dispatch routing, Truck placement, Picking and packing, Loading, Warehouse space allocation	Supplier performance and selection, Campaign performance, Reports, Customer Insights, Market expansion plan	Revenue Projections, Sales Plan, Sales Programs, Finalize Forecasts, Contingency plan, Account level business plan	Asset tracking, HR recruitment and onboarding, New asset procurement, Financial reports and dashboards, Senior Leadership reports
Activities	Business Planning, Goal setting, master Production Scheduling, Executive S&OP	Cross sell, Upsell, Assortment customization by store, Demand to trading partner, Product pricing, Trade deductions, Replenishment planning, Space planning	Production Plan, Production scheduling, Line management, Material movement, Testing and quality control, Job order execution, defect management	Receiving, Put away, Inventory planning, Pick and pack, Shipping, Labor management, yard and dock management, Reporting	Marketing Plan and Strategy, Trade Promotion planning, In-Store Merchandising, Supplier management	Pre-S&OP, Supply and Inventory Planning, Capacity Planning, VoC, Account Development, Sales management, Create Contracts	Regulatory and compliance management, IT Operations planning and governance, Finance reporting, Asset utilization reports, Customer service management, Training & Development

Metrics	Goal achievement, Performance reports, Sales Comparison, Sales volume, Business Growth, Competitor analysis, Stakeholder communication	Category Sales, Product wise sales, Category penetration, New Item sales, Out of Stocks, Account profitability, Planogram profitability, Product profitability	Defect reduction, Waste management, Line utilization, Resource utilization, Quality management, Returns, Unit cost, Production downtime	Track material transfer, Truck wait time, Dispatch and delivery turnaround, Delivery cycle accuracy, Inventory accounting, Stock on hand, Stock in Transit, Goods returns	Market Basket Analysis, Promotion effectiveness, Customer loyalty, Social advocacy, Trade Promotion effectiveness, Supplier performance, CLTV	Account growth, New Leads, Lead conversion, Forecast variation, Revenue targets, Sales pipeline coverage, Customer acquisition cost, Monthly Sales	ESAT, CSAT, Compliance cost, Incident resolution, Leaks and faulty payouts

Fig 1.3: CPG value chain

In order to drive these growth levers, RPA automation plays a pivotal part. The industry has moved from being order driven to consumption driven and is of utmost importance to be ahead of the curve. The rise of Private labels is providing affordable alternatives to established brands, and hence cost savings become key. Omnichannel business strategy is catching up, and organizations need an intact and organized inventory management system to cater to multiple channels. Subscription models have now reached the CPG industry and are seeing explosive growth, and trade promotions and campaigns are more important now than ever

Technology plays a key role in connecting business plans and consumer needs. Constant connectivity is the new state of existence, and connected consumers is a very important strategy to be focused. CPG companies are changing the focus from customization to personalization with the rising advent of IOT which can be seamlessly achieved with Mobile and location-based services and investing in an integrated IT infrastructure.

Having an Agile supply chain in e-commerce and having a predictive demand forecast system will help in solving the immediacy trend where customers are unwilling to wait. Finally, tapping social media for rich consumer insights should be the order of the day as Social media has become a way of life for Millennials, Gen X, Y, Z

Keeping these Business and Technology drivers in mind, the process maps for enterprise processes have been outlines to represent where RPA can help and provide the necessary in-roads for CPG companies. Benefit tracking of automation can be done through the KPIs associated with each process.

Automation areas in the CPG value chain and KPIs

Extent of Automation	High ●	Medium ●	Low ●

PLAN

Brand Portfolio Planning → End of Life planning → Initiatives Planning → Category Management → Product Testing → Product Lifecycle Management

Demand Planning & Forecasting

Key KPIs: *Time to market, New product sales, Total # of new products in consideration, Estimation, or Planning stages*

BUY

Sourcing and Supply → Order/ Purchasing → Vendor Portal → Vendor Management → Vendor Scorecard → Quality Control

Key KPIs: *Lead time, Procurement ROI, PO & invoice accuracy, Vendor defect rate, Compliance rate, Time reduction in adding new vendors, PO cycle, Vendor availability, Price competitiveness*

MAKE

Production Planning → Production Scheduling → Manufacturing Execution → Quality Management → Waste Management

Key KPIs: *Asset utilization, Order fulfillment, SKU creation, Cycle time, % decrease in scrap and re-work costs, Manufacturing cost per unit*

MOVE

Freight Management → Inventory Management → Materials Management → Order Processing → Item Replenishment → Returns Processing

Key KPIs: *Order to shipment time, Unused and unplanned capacity expenditure, Volume processed per day, Rate of customer returns, Inventory turnover ratio, Inventory carrying cost, Shrinkage, Cost of carrying inventory*
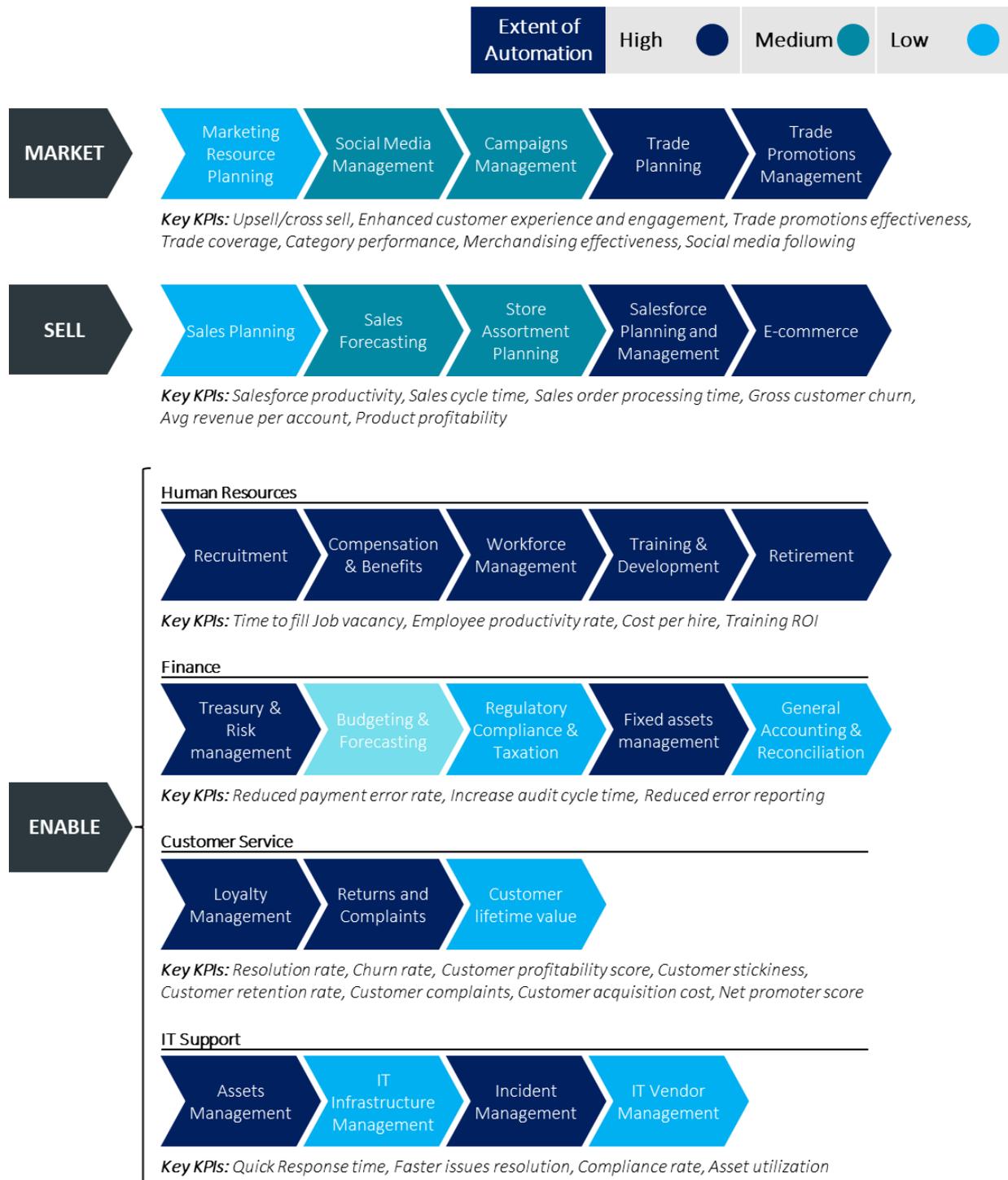
Fig 1.4: Automation propensity map across CPG value chain

In conclusion, we can see that RPA can have a high impact on nearly 50% of the CPG processes, with broader benefits including better accuracy, faster throughput, higher straight through processing, improved tracking, reduction in handling time/transaction, increased visibility and timely monitoring of critical activities.

We will now look at the challenges within the CPG industry, and the underlying opportunities for RPA.

5. CHALLENGES AND OPPORTUNITIES

The CPG industry faces various challenges; while some of these cannot be directly remediated through technological disruption, there is a great extent of relief that can be brought in and brand image can be built in through adoption of transformative technologies like automation. Some of the key challenges faced and opportunities of improvement are: -

Performance Determinant	Challenge	Opportunity
Customer Loyalty	• Rapid shifts in the customer buying pattern • Impact of supply chain risks on time to market	• Creating brand loyalty through timely and diligent customer connect programs i.e. promotional offers, state of the art customer service handling • Mitigation of cross departmental transactional delays, improved transparency of information interchange
Labor Intensiveness	• Dependency on labor (skilled and unskilled) • Impact of political, environmental factors on availability of labor • High attrition rates • Evolution of Roles • Wage Rules and Laws	• Optimal manpower utilization – only for cognitive tasks and manual checking/approving activities which cannot be transformed through IT • Role wise segregation of duties – higher reusability wherever possible and compliant • Digital Assistant, Digital Worker concepts for tasks of lesser arbitration and higher frequency of execution
Risks with integrating supply chain	• Rise in channel complexities • Volatility of exchange rates and commodity prices • Disparity of process and technology maturity across vendor/supplier/distributor	• Collaborated, one-point handling of channel relationships with regular performance review • Real time tracking and processing of critical data like prices, tax rates, surcharge etc. for better handling of situations and better budgeting • Technology working as an inherent middleware to handle information exchange from disparate systems
Handling reverse logistics	• Enforcing priorities on returns - tracking becomes an issue as the emphasis is on forward flow of goods into the market • Returned goods being scrapped without proper validation	• Digital supply chains to make reverse logistics more efficient • Automations to assess goods performance / quality to identify the variance, manage vendor performance, inventory movement and manage accounting heads.
Data Volume	• Huge volumes of unstructured, un-sanitized data which could have a meaningful utilization for the business, remains unused	• Efficiently handle data volume, veracity and velocity and reduce the 'time to insights' • Automation models to handle data from disparate systems – data messaging,

Performance Determinant	Challenge	Opportunity
		standardizing, categorizing and storing for present and future use
Lack of BCP readiness	• Crest and troughs in labor demand • Erratic consumer behavior and consumption patterns • Fluctuations in order volumes and items in demand	• A hybrid workforce equipped to handle human dependency for routine and repetitive tasks and avoid business disruptions • Automation of processes to have a sustainable impact even after the unforeseen • Digital workforce to manage critical operations seamlessly without human interventions

6. INTRODUCING PROCESS DRIVEN AUTOMATION

The traditional method of approaching automation opportunities, is to conduct a detailed time and motion study of the individual processes across the value stream and determine what improvements can be made through automation. This approach to study business processes at a detailed level and identifying the automation opportunities is called the Process Driven Approach. The process driven approach qualifies the opportunities based on efficiency, effectiveness and experience factors from perspectives of: -

- Volumes which consume a person's critical bandwidth
- Execution time – the time spent by the person doing redundant work or non-value steps
- Degree of rework and propensity of errors
- Tasks making a person's work mundane e.g. checks and verifications

Once the detailed study of the opportunities has been completed, a qualification report is generated based on the degree of automation possible, impact of the automation on dependent flows, cost-benefit factor. Based on the qualification report and client's preference, creation of a priority matrix helps to plan out the RPA roadmap, deployment and support frameworks.
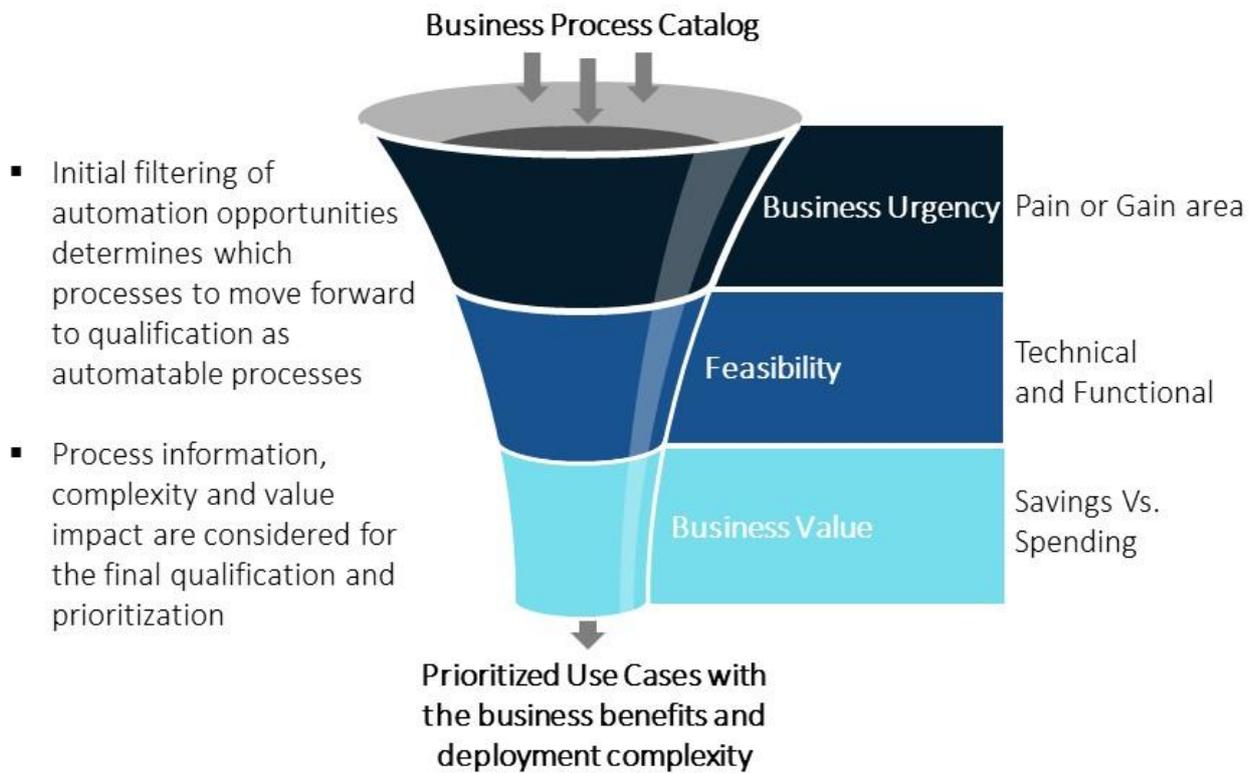
Business Process Catalog

- Initial filtering of automation opportunities determines which processes to move forward to qualification as automatable processes

- Process information, complexity and value impact are considered for the final qualification and prioritization

Business Urgency — Pain or Gain area

Feasibility — Technical and Functional

Business Value — Savings Vs. Spending

Prioritized Use Cases with the business benefits and deployment complexity

Fig 1.5 – Process Prioritization Funnel

Following the prioritization process, derive the 'value benchmarking' and 'measurement' as follows: -
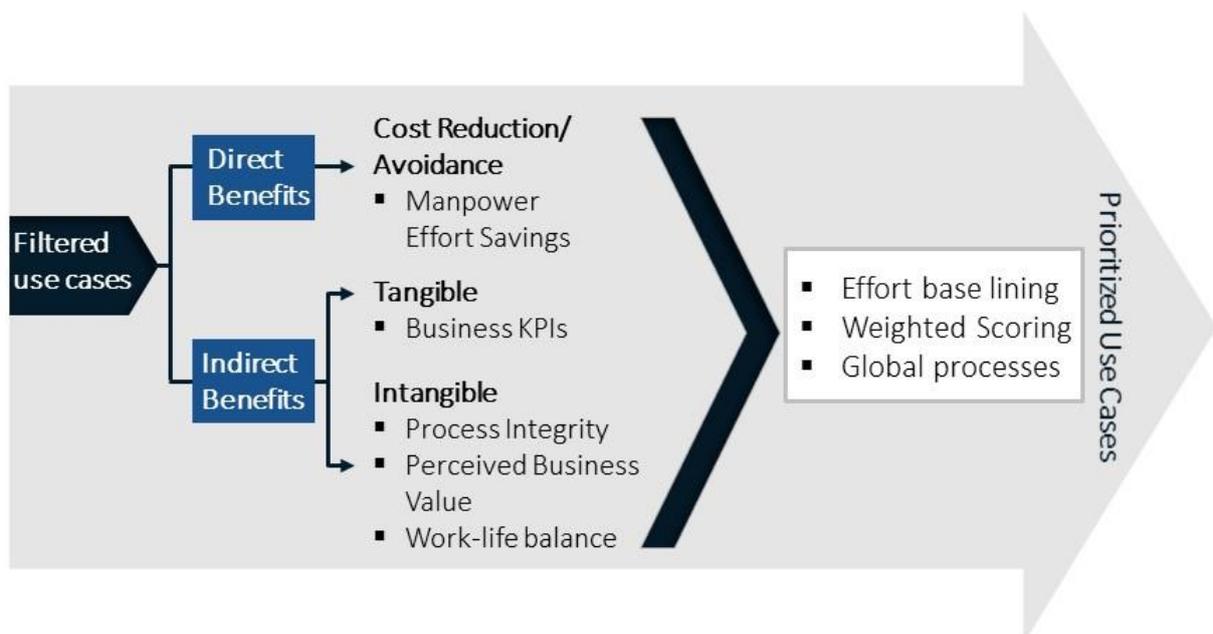

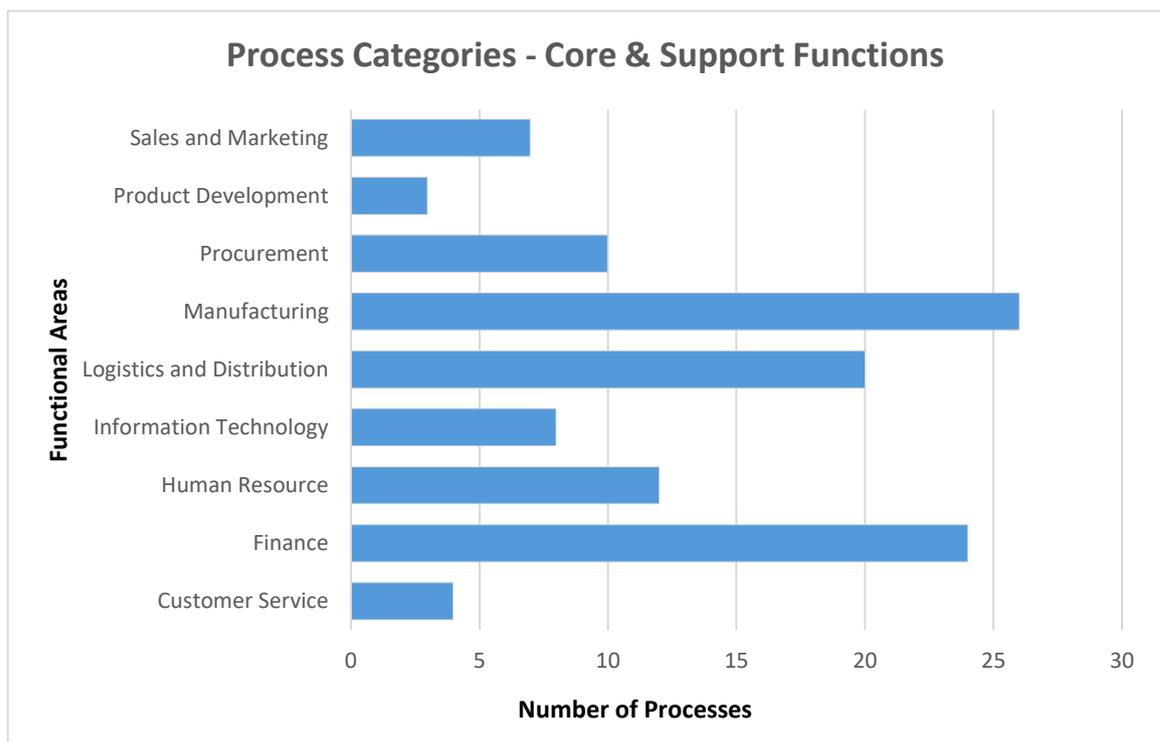Fig 1.6 – Value Measurement Framework

Initiate the value measurement once the automated processes are implemented and BOTs start to execute the day-to-day activities. Capture the performance parameters to identify the resulting value from automation in terms of Effort savings, Cost savings, SLA adherence, accuracy and additional baselined business KPIs.

6.1. PROCESS CATALOG

After conducting a detailed analysis of the CPG value chain, business functions and multiple CPG industry players, following is the process catalog with the list of processes which can be automated. (Refer Appendix for the Process Catalog)

6.2. FUNCTION WISE AUTOMATION PROPENSITY

Based on the processes study and process cycle mapped in Section 5, we find that the eligibility of automation across different core and supporting functions of the CPG industry is as follows –

Process Categories - Core & Support Functions

Functional Area	Number of Processes
Sales and Marketing	7
Product Development	3
Procurement	10
Manufacturing	26
Logistics and Distribution	20
Information Technology	8
Human Resource	12
Finance	24
Customer Service	4

*Based on a study of 114 processes, the above chart shows the function wise propensity of automation

The advantages of the above representation are: -

- Quick view of functions with a greater number of automation candidates
- Opportunity to look persona-based standardization

Automation Propensity Overview

In this view, we are representing some of the processes pertaining to the above functions in terms of their complexity and the degree of automation possible.
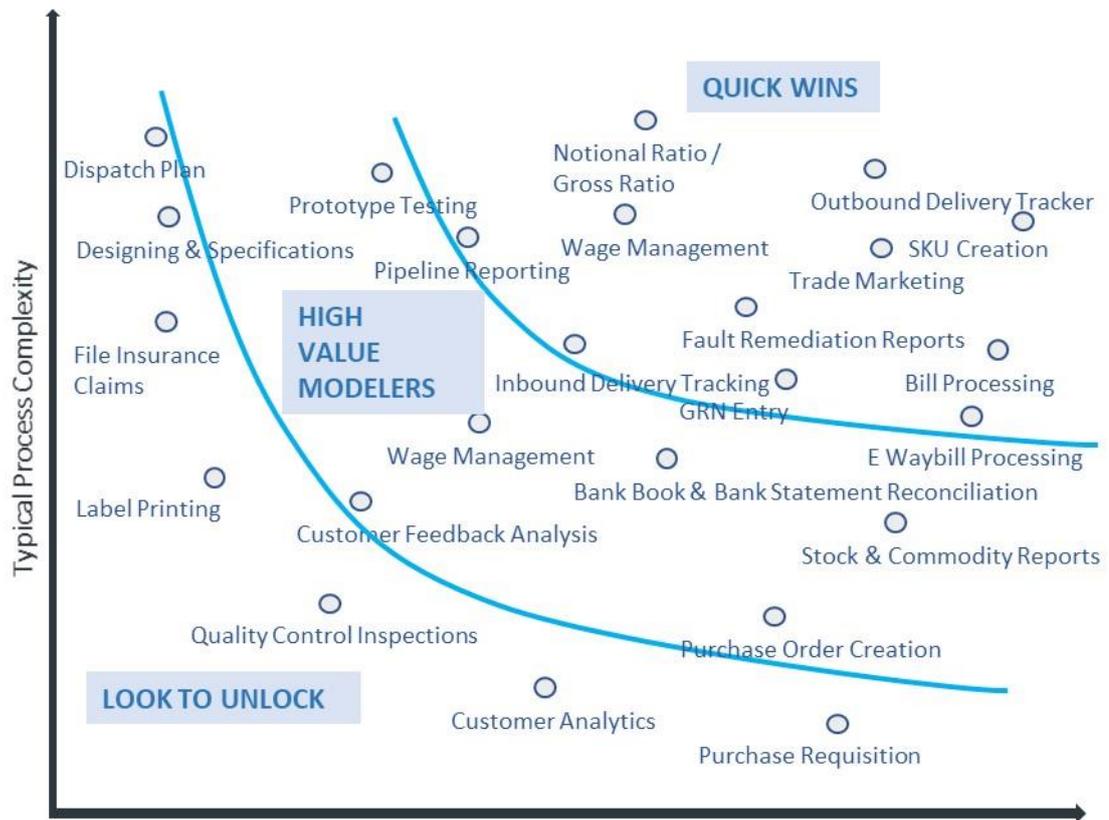
*Complexity to Automatability representation of CPG processes

The advantages of the above representation are: -

- A pin-point view on which process to start with
- A foundation to create a process prioritization matrix

Now let's see what the possible approaches could be to embark on the RPA journey or take the RPA journey to the next level of enabling transformation within an organization.

7. INTRODUCING THE DIGITAL WORKFORCE – PERSONA DRIVEN AUTOMATION

While the Process Driven Approach is a standard and widely adopted method to start the automation journey, we have come up with a new approach of amplifying human potential with a hybrid workforce where human skills are complemented with digital skills. This concept is based on: -

A. Looking at creating helper bots across job roles – Digital Buddy
B. Looking at creating bots which can take a major part of the job role thus streamlining workforce – Traditional Persona or Digital Workforce

In both cases the, method of approaching an automation opportunity is largely people centric. This is a purely design thinking led approach which captures efficiency, effectiveness and experience from perspectives of: -

- Repeatability vs Redundancy – the frequency of execution of a particular task over a period of time vs the number of times the task is executed without much value
- Time taken to execute – the time between the arrival of the task request and initiation of processing of the task
- Number of steps that are manual and are automatable
- Decision making vs Discretion

To construct a Persona, following is the structured approach to identify the manual tasks which can be transformed into digital skillsets: -
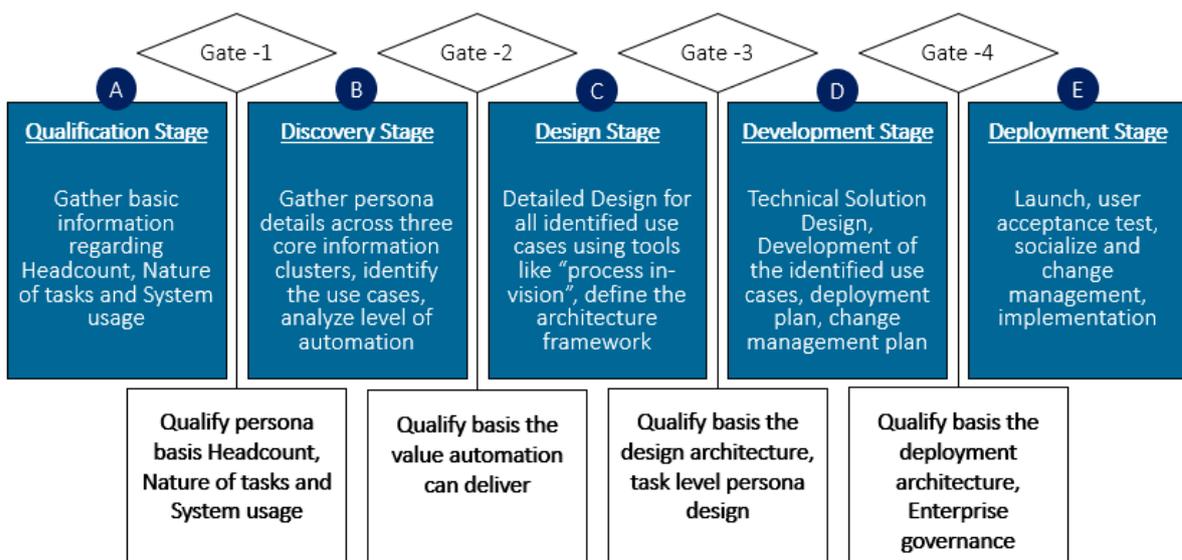

Fig 1.7 – Persona Modelling approach

Extending the Digital worker concept to CPG, outlined are 3 major personas through which this industry will benefit the most based on the assessment of the degree of automation possible, tasks across roles and the value expected from automation.

7.1. SUPPLY CHAIN PLANNER

> **Key KPIs of a Supply Chain Planner**
>
> Negotiations Skills | Procurement ROIs and Benefits| Quality Assessment | Spend Under Management| Optimized timing and sourcing for purchase process | PO and Invoice Accuracy | Minimal Emergency Buying |

The Supply Chain Planner plays a critical role in the Plan, Buy, Make and Move phases of the CPG value stream. His/her key responsibilities lie in anticipating demand, ensuring purchase as per the product design and production plan, availability of the required materials for smooth production process, assess and manage risks across the supply chain and ensure smooth delivery of goods. Throughout the cycle, the supply chain planner interacts with multiple stakeholders – sourcing(suppliers), purchase(in collaboration with finance), production (warehouse management, inventory management, plant operations, quality assurance), distribution (logistics and transportation); therefore there is a huge responsibility riding with him/her to ensure smooth flow of operations.

Keeping the criticality of end user bandwidth in mind, the following Supply Chain Planner persona construct complements the day-in-life activities with digital skillsets: -
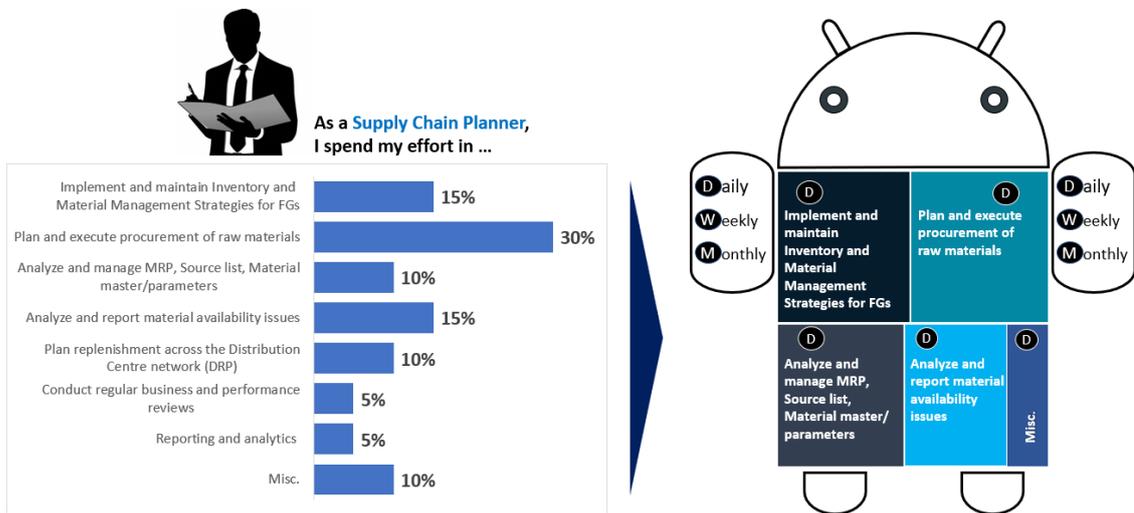

Fig 1.8 – Modelling the Supply Chain Planner Persona

7.2. PRODUCTION PLANNER

> **Key KPIs of a Production Planner**
>
> Reduced throughput times and WIP inventory levels | Improved Product Quality | Efficiency of Production Plans | Minimum Rejections | Minimum Inventory Deviation

The Production Planner plays a critical direct role in the Plan and the Make phase and an indirect role in the Market and Sell phases (market response to the product, complaints, demand will have impact on production and therefore the Production Planner). His/her key responsibilities lie in ensuring efficient and risk-free operations and implementation of new industrial techniques at the plant. He/she coordinates workflows for one or more products, planning and prioritizing operations for maximum efficiency, enforcing quality control measures and minimizing wastage.

Keeping the criticality of end user bandwidth in mind, the following Production Planner persona construct complements the day-in-life activities with digital skillsets: -
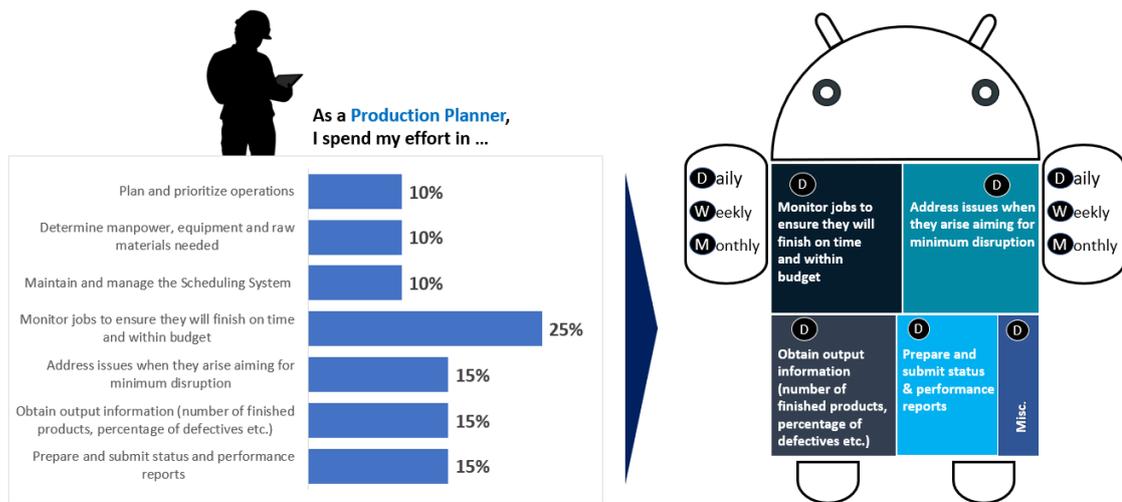

Fig 1.9 – Modelling the Production Planner Persona

7.3. CATEGORY MANAGER

> **Key KPIs of a Category Manager**
>
> Minimum spend under procurement influence | Minimum spend under contract | Negotiation Skills | Zero Based Budgeting | Financial Assessments

The Category Manager plays a critical role in the Plan and Buy phase. His/her key responsibilities lie in devising sustainable strategies for product development, efficient buying of raw materials in order to optimize costs and reduce wastages, plan exit strategies for unsuccessful product in order to minimize the sunk cost. He/she works closely on the spend categories to tackle duplication, re-work and out of control spending on procurement.

Keeping the criticality of end user bandwidth in mind, the following Category Manager persona construct complements the day-in-life activities with digital skillsets: -
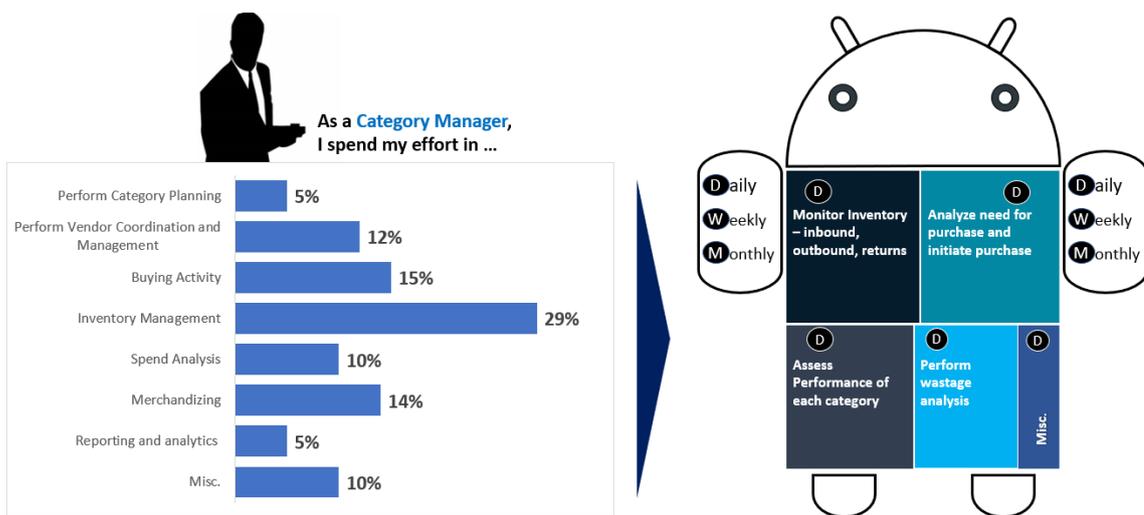

Fig 1.10 – Modelling the Category Manage Persona

7.4. DEMAND PLANNER

Key KPIs of a Demand Planner

Monitor the demand and forecast metrics | Identify the correct levers for forecasting for a duration | Minimum Product category forecast error | Minimum long-term capacity planning errors | Minimize Weekly Item location forecast errors

The Demand Planner plays a critical role in the Plan phase. His/her key responsibilities lie in devising sustainable strategies by reviewing trends, historical demand/consumption data to devise the demand drivers, conduct forecasting activities for product categories/products, create and maintain the forecast models incorporating information from all facets of business, customers and third party. He/she finally prepares the consensus forecast/statistical forecast and communicates the forecast to all relevant cross-functional stakeholders.

Considering the criticality of end user bandwidth, ensuring that the job outcome is accurate and timely, the following Demand Planner persona construct complements the day-in-life activities with digital skillsets: -
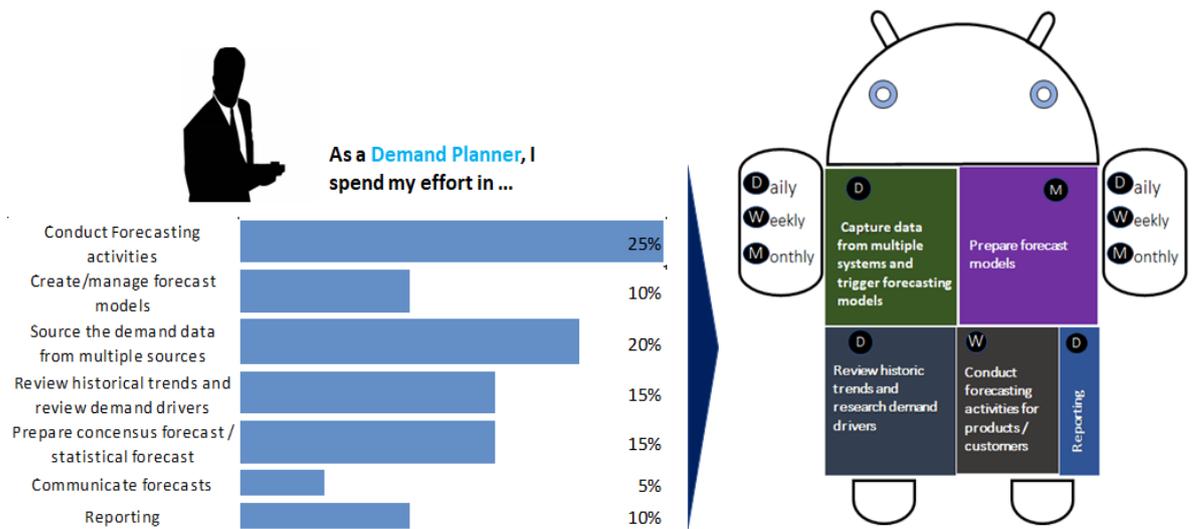

Fig 1.11 – Modelling the Demand Planner Persona

7.5. LOGISTICS MANAGER

> **Key KPIs of a Demand Planner**
>
> Monitor stock rotation | Minimize warehouse cost | Maximize capacity utilization of warehouse space | Reduce the truck loading and turnaround time | Order fulfillment accuracy | Maximize OTIF | Maintain inventory accuracy | Minimize errors in put away, picking, packing

The Logistics Manager plays a critical role in the Move phase. His/her key responsibilities lie in devising sustainable strategies for the inbound and outbound logistics to manage the warehouse, transportation and inventory within the warehouse. He/she keeps track of the goods receipts and returns, SKU level stocks, delivery times, transportation cost and all warehouse assets. He/she arranges the warehouse, catalog goods, plan routes and processes shipments to meet the cost, productivity, accuracy and timeliness targets. Finally the KPIs and data are analyzed to assess performance and implement improvements.

Considering the criticality of end user bandwidth, ensuring that the job outcome is accurate and timely, the following Logistics Manager persona construct complements the day-in-life activities with digital skillsets: -
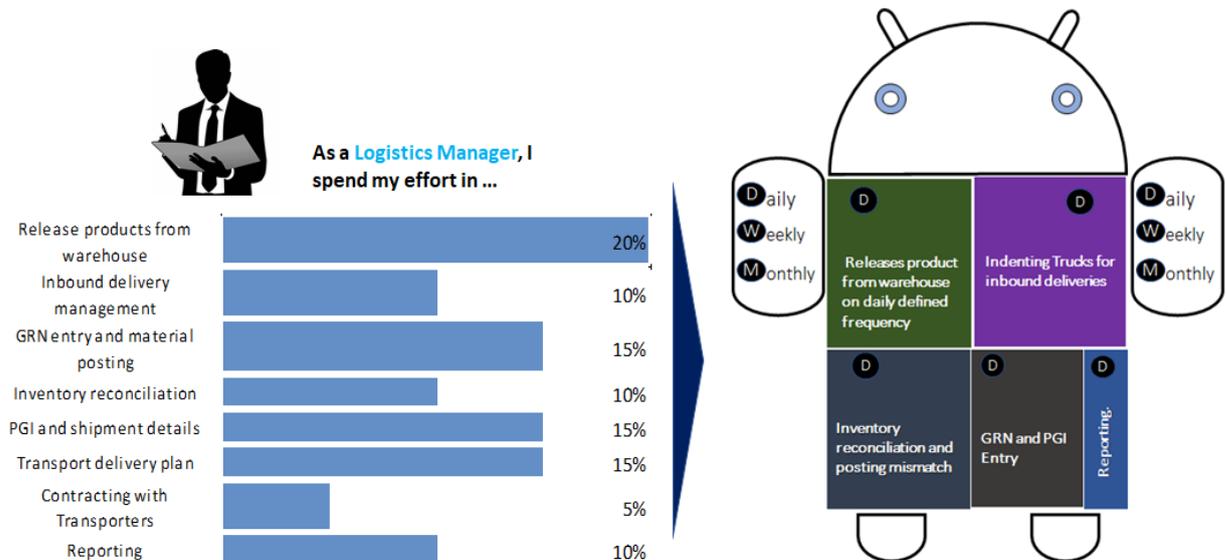

Fig 1.12 – Modelling the Demand Planner Persona

8. GETTING STARTED

8.1. APPROACH TO AUTOMATION

From an approach standpoint, a process and technology landscape study to identify automation potential is a must. However, to accelerate this process we have created a starter kit which gives a ready reference list of processes across the different high automation propensity functions based on time and motion perspective. While the Starter Kit will help quick start the automation process for new adopters, the traditional approach of Discovery to Sustain still remains relevant to create automation waves for sustainable outcomes.

Outlined is our consulting led approach for an end to end automation cycle: -
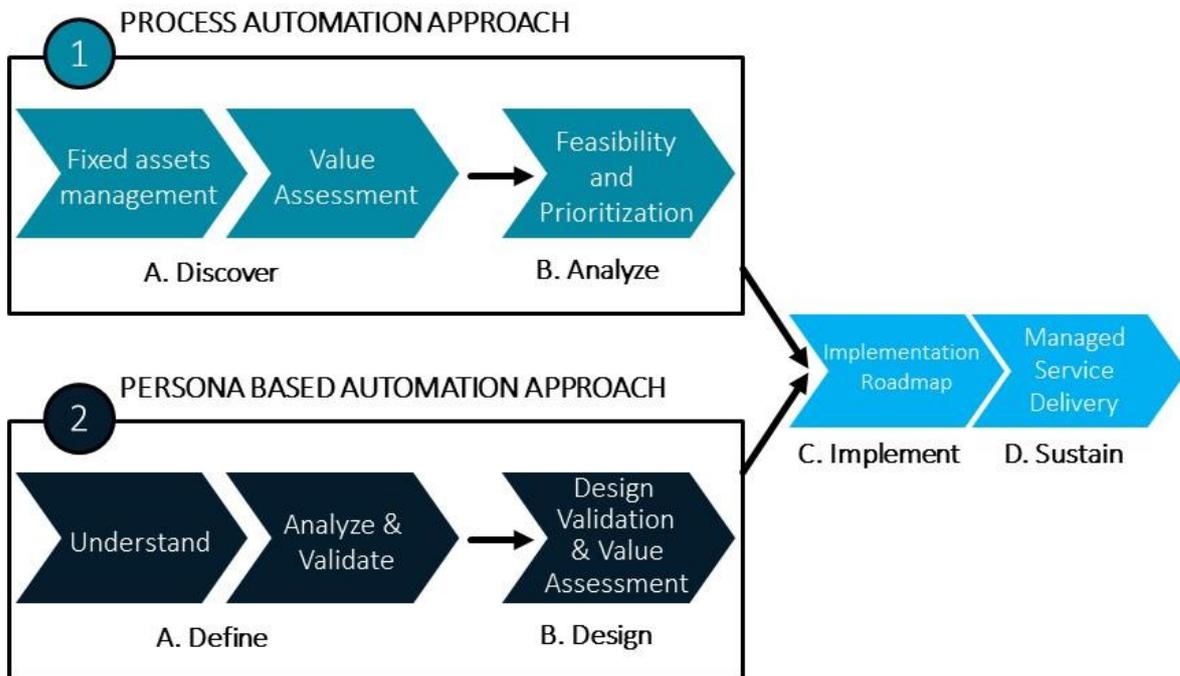
Fig 1.13 – Process Discovery and Mining Approach

8.2. METHODOLOGY

Process Discovery and Prioritization Methodology

Our Process Discovery and Analysis phases are powered by IP driven methodologies and frameworks that has been built based on industry best practices and execution experience. The discovery, process prioritization and value assessment are conducted using our E^3 Framework (Efficiency, Effectiveness and Experience) wherein each process is studied in detail and key parameters are captured to determine the following:

- Dependencies – Technology, People, Upstream-downstream process
- Actions Performed at each step – determine whether it is a necessary action, action leading to non-value add, action prone to error or deviation from expected method, repetitive, manual interventions needed

- Degree of Repeatability
- Degree of Redundancy
- Time Factors – time to response, time to wait, time to execute, frequency etc.
- Degree of work not happening on IT e.g. reading and understanding data before being fed into IT system

Perform a detailed data/response collection based on the key attributes of Efficiency, Effectiveness and Experience, our framework determines the degree of automation and complexity based on predefined rules and thresholds.

Based on this output, we corelate the candidate processes with automation priority for business. Predict the notional ROI considering the total effort involved in executing the as-is process, the TCO for automating the process against the expected returns on automating the process.

Persona Discovery Methodology

Our QD4 framework is used to qualification and design the Digital Persona. The data collected and the correlations derived from the design-thinking led approach helps to determine which role and tasks for the roles have a higher propensity for automation to deliver a higher return.

After helping our clients by creating an opportunity wave, detailed roadmaps are created for implementation and carry out business as usual. It is achieved through the following: -

- Pure Play Automation Ownership – Where we help the client with consultancy on how to go about with automation, do the implementation and handover so that the client and own and manage the program by themselves
- Managed Services – In this model we own the delivery and sustenance of the automation program end to end. We may play the role of license reseller in certain situations. Additionally, we have a Bot as a Service – In this model, we own process as whole therefore the infrastructure, licenses also come under our responsibility.
- POV as a Service – Should a client wish to test waters before deep diving into automation investments, we also provide a POV (Proof of Value) as a service, wherein we help simulate a critical part of the opportunity and establish the fitment of solution (the bot framework, automation tool) and present the value to our clients. This is a Pilot of mini-project model wherein the scope of the deliverable is limited to prove the concept and the value.
- RPA Support as a Service – Under this model, we may take up the support and governance of an RPA program that we have developed or any other entity has developed, with the main aim of running it at high efficiency, performing bot rationalization to optimize resource consumption and maximize output.

Based on the different stages of automation maturity that our clients have; we can assist them with an aligned strategy for growth.

Stage	Challenges	How can we help
Seekers – Planning for RPA investment	• Relevance and feasibility of automation • Risk and cost of transformation • Product evaluation	• Product comparison and selection • Starter kit • Process mining
Samplers – Conducting Proof of Technology / Concept	• Selecting the right product • Identifying the right use cases for automation • Business case for Automation	• Business case creation • Alternate platform selection • Process mining and prioritization • Implementation services • Functional and Technical experts • Value modeling
Embracers – In early stages of implementing RPA	• Enterprise process discovery • Process standardization and streamlining • Bot development and deployment • Bot support and maintenance	• Value baselining and measurement • Industry specific automation process catalog • Establish governance and RPA CoE • Different engagement models (Automation as a service / Managed service) • Change management • Use bots for end user support and issue triaging
Champions – Have done RPA implementation at scale and innovation	• Scale Bot implementation and deployment • Intelligent Automation • Bot KPI improvement	• Integrated Automation solutions – End user computing as a service, PLM Support automation, Test Automation • Change Management • Intelligent Automation Establish RPA CoE • Validate coding best practices using QC bot • Use of bots for end user support and issue triaging

8.3. STARTER KIT

In order to kick start the automation journey for our client <minimize the time from discovery to design>, we offer the Starter Kit catalogue in which the client is free to choose from the process catalogue and based on the complexity assigned to the process, there will be a fixed rate charged for the services (* RPA Licensing is exclusive of this).

Based on our experience in handling various client requests, following is a representative development to deploy timeline: -

Automation Complexity	Avg. Turnaround Time (in days)
Simple	15 – 20
Medium	25 – 35
Complex	35 – 45

Following is the Starter kit process catalog: -

Sl#	Business Area	Simple Use Cases (Pick any 2)	Medium Use Cases (Pick any 1)	Complex Use Cases (Pick any 1)
1	Product Development	• Recipe Report • New SKU creation	• Fault Assessment Reports • Prototype Test Reports • Product Label Printing - pallets/bundles	• Documentation and validation of the design specifications
2	Procurement	• Purchase Requisition Creation • Purchase Order Creation • Commodity Buying stock report	• Goods Receipt Note Entry • Inbound Delivery • Sourcing Report • Merchandising order processing system • Imported Material Planning & Ordering System	• Info record Creation • BOM Updation
3	Manufacturing	• Quality Reports • Daily Power consumption Report • Daily Water Consumption Report • Fuel Status Report • SKU creation • Stock-on-hand report	• Warehouse utilization report • Goods Received Reports • Daily Stock Reporting • Scrap Reporting • Material Traceability Reports • Daily factory production report • Material Variance Report • Inventory Adjustments • Order Fulfillment • Fill Rate Reports	• Weekly Pipeline Report • Demand & Supply Planning • Order Fulfillment • Manufacturing Schedules • Equipment Insurance Requests
4	Logistics & Distribution	• E-Way Bill • Shipment Tracker • Indent vs Placement report • Delivery Order status report • Direct Dispatch Tracker • Stock transfer movement status report • Warehouse Equipment Service reminders	• Stock Transport Order Execution • Post goods issue • Inbound delivery (IBD) flow report • Truck Top-Up Updation • Delivery Advice Process (DA) • Salvage Reports • Order Execution & order return status report • Automation for verification of receipts for purchase orders, shipping notices & segregation of orders	• Truck Indenting • Dispatch Plan • Invoice Creation before dispatch • Data extraction from Invoices • Returns Management
5	Finance	• Order Information Report	• Employee Wages Schedule (Gross V/s Net V/s Bank Payment) • Pay slip and Tax Deduction Certificate Generation • Spend Analysis • Process Petty Cash Transactions • Stock Valuation report • Products Costing • Final Credit Note payments • Grading Report • Cash Flow Statement • Daily Sales report • Closing stock inventory reconciliation • Indicative invoicing	• Net profit calculation • Bill register vs GRN reconciliation • Bill Processing • Bank Reconciliation System • Freight Settlement • Voucher Processing • Reimbursement Processing • Travel Expense processing • Medical Claims processing • Payment processing for Media and Marketing • Credit Limit Sanction

Sl#	Business Area	Simple Use Cases (Pick any 2)	Medium Use Cases (Pick any 1)	Complex Use Cases (Pick any 1)
6	HR	• Attrition report • Employee Probation Confirmation • Candidate Connect • Appreciations and Award • OA Promotion Letter • Joining Note CMC	• HR Compliance reports • Exit process • Deputation Cycle Management • Employee application • Employee Onboarding	• HR Helpdesk • Recruitment source mix • Employee Onboarding
7	IT	• Asset Tracking • Ticket logging • Website availability and accessibility	• Backup Monitoring • Vendor Service Request Handling • System Audits • Share Drive Access Control Report • Ticket triaging	• IT Helpdesk management • Expense Report
8	Customer Service	• Customer Feedback Reports • Customer service ticket logging	• Customer Support Management • Customer Feedback Analysis to Product Design Team	• Customer rewarding program
9	Sales and Marketing	• Orders for payment processing report	• Benefit Programs • Sales Order Creation • Promotion & Inventory Planning • New Product sales summary	• Sales binder • Trade Marketing • Multi- Language Promotions

9. CONCLUSION

The top reason why automation is still viewed with unease lies in the demands made by automation technology on process maturity. Organizations are not certain if they are ready for automation. In many instances, they have already failed to extract real benefits from their automation pilots. This is because of the type of end objectives set for their automation programs, the most popular being, "I want to reduce X people in the organization." Just replace X with any number from 5 to 500.

Other objectives that lead to failure are, "I don't have enough manpower and I want automation to fill the gap." This is even though organizations have, for years, developed macros to automate worksheets—each time to ensure that tasks are done faster and more accurately by their workforce, and never with the goal of eliminating or replacing manpower.

To succeed, we offer one thumb rule: Continue to keep the benefits of automation narrowly focused on making the workforce agile, amplify human potential, make more time available to employees so that they can perform better and elevate their cognitive potential.

People are being loaded with more work than ever before. They are expected to quickly learn new skills and if they do, it is at the cost of being able to use their cognitive skills. Automation is a way to regain cognitive ground.

Boosting employee potential is a remarkably powerful objective. But we have seen it fail in 80% of the engagements that we have been involved with. Reason: Organizations fail to see the larger picture; they feel that once you apply automation, employees will be free when in reality what

needs to be measured (and reported) is the improvement in throughput, reduction in turnaround time and accuracy of process execution.

Let's examine a commonly experienced problem—that of worker fatigue from repetitive tasks such as creating purchase orders from voice calls, emails and chat applications. After doing this task repeatedly, fatigue injects errors into the process. The cost of inaccurate purchase orders slipping into the system and the cost of rework are huge. Robotic Process Automation and Virtual Assistants can easily reduce this cost by improving worker efficiency and reducing fatigue.

If automation can deliver such major impact, what can organizations do to eliminate barriers to the technology? The truth is that organizations don't know where to begin. Traditional organizations want to see value in automation that is tangible. Often that is difficult to demonstrate in the first few cautious projects. But the deeper truth is that by not proposing an adoption plan they are making it harder to assimilate automation into their business and culture, while the rest of the world moves ahead.

We hope this document has been able to bring clarity in the thought process, the start and the end points, and most importantly, appreciation of the fact that the hybrid workforce is here to help, sooner than later. Earlier one adopts, faster is the road to nirvana.

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10. APPENDIX

Sl#	Functional Area	Use Case	Use Case Description	Role
1	Customer Service	Customer Feedback Reports	Report generation of feedback received for products	Customer Service Manager
2	Customer Service	Customer Support Management	Automation in customer feedback tracking, service wait times and patterns analysis across customer issues	Customer Service Manager
3	Customer Service	Customer Feedback Analysis to Product Design Team	Generate customer feedback reports to be sent to product design team and manufacturing	Customer Service Manager
4	Customer Service	Customer rewarding program	Run analysis of customers participating on reward programs, selection of winners and due communications	Customer Service Manager
5	Finance	Spend Analysis	Generation of summary reports, creation of payment headers for the customers and reporting across to stakeholders	Finance Manager
6	Finance	Credit Limit Sanction	Perform credit control to determine payment terms and extent of credit benefit allowed	Finance Manager
7	Finance	Order Information Report	Report generation of an orders including historic data, geographical data in order to create consolidated product consumption view	Finance Manager
8	Finance	Net profit calculation	Report generation based on collation of data on the expenses on the product and the revenue generated from the products. Involves prior level of data collation, messaging followed by running calculations to find the profit	Finance Manager
9	Finance	Bill register vs GRN reconciliation	Performing a reconciliation of the bills received against the goods that have been received	Finance Manager
10	Finance	Bill Processing	3-way invoice matching and disburse payment on successful reconciliation, generate discrepancy note in case of mismatches	Finance Manager
11	Finance	Bank Reconciliation System	Bank book and bank statement reconciliation for intercompany and intra-company transactions	Finance Manager
12	Finance	Freight Settlement	Process freight settlement request based on the bill registered, taxes/tolls paid and the service order	Finance Manager

Sl#	Functional Area	Use Case	Use Case Description	Role
13	Finance	Voucher Processing	Process vouchers based on purchase orders, service entry registrations.	Finance Manager
14	Finance	Employee Wages Schedule (Gross V/s Net V/s Bank Payment)	Detailed wage report based on employee salaries, bonus/benefit payouts, recovery and bank transactions performed for the same	Finance Manager
15	Finance	Reimbursements	Under employee benefits and perks, process payouts/reimbursements based on employee eligibility and expenses shown. Will involve document verification and validation	Finance Manager
16	Finance	Payslips and Tax Deduction Certificate Generation	Generation of payslips, benefit notes, tax certificates and forms based on labor rules and regulations, which are part of employee payroll management	Finance Manager
17	Finance	Travel Expenses	Process payouts under travel expense reimbursement schemes based on employee eligibility and other factors (conditional approvals, client interventions, natural disaster etc.)	Finance Manager
18	Finance	Medical Claims	Process payouts under medical expense reimbursement schemes based on employee eligibility and other factors (conditional approvals) majorly under Health Schemes and for Tax Benefits	Finance Manager
19	Finance	Payment processing under Media and Marketing activities	Reconciliation and payments based on booking/engaging media for promotions/advertisements	Finance Manager
20	Finance	Process Petty Cash Transactions	Process petty cash transactions based on authorization, cash limits and due approvals	Finance Manager
21	Finance	Stock Valuation	Valuation of the complete stock and generation of monthly reports	Finance Manager
22	Finance	Sales Order Creation	Receive Sales requisitions from field sales agents and channel partners. Consolidate the Sales requisitions and create Sales orders in the enterprise system. Post the sales orders and allocate to different production units.	Finance Manager
23	Finance	Products Costing	Product costing sheet is prepared for every SKU. The details for creating the costing sheet is fetched from multiple system master files (as per design the raw material details & associated costs)	Finance Manager

Sl#	Functional Area	Use Case	Use Case Description	Role
			& further excel analysis is done to create a final costing sheet.	
24	Finance	Final Credit Note payments	This process involves the creation of credit note payments. Once any amount is credited, simultaneously a debit entry is posted for the same. Thereafter it goes for Bill registration and then entry is posted in the Customer's Vendor a/c. Then printout of the debit and credit voucher along with supporting document is taken and then given to payment team for final processing.	Finance Manager
25	Finance	Grading Report	Monthly once grading report is prepared, which require SOH, Secondary Sales & Principal Outstanding details to provide quality score to outstanding amount.	Finance Manager
26	Finance	Cash Flow Statement	System generated reports are downloaded and linked to each other to prepare the cash flow statement.	Finance Manager
27	Finance	Daily Sales report	Daily sales report is generated by SKU, category, account etc. Details are fetched from ERP system, excel analysis done, business rules are applied & final output report is created.	Finance Manager
28	Finance	Closing stock inventory reconciliation	Closing stock inventory reconciliation is done for stock details (location, aging etc.) from multiple system files. Details are fetched from system, excel analysis done, business rules are applied & final output report is created.	Finance Manager
29	Human Resource	Attrition report	Reporting of attrition rate - number of employees onboarded vs number of employees resigned, sacked, death	HR Manager
30	Human Resource	HR Compliance reports	General reports on LOB wise adherence to core company mandates - IT rules awareness, GDPR awareness etc.	HR Manager
31	Human Resource	Employee Probation Confirmation	Confirmation on retention or release based on performance feedback provided by reporting managers on employees under probation	HR Manager
32	Human Resource	Exit process	Reconciliation of pending dues, interacting with different stakeholders and updating the records in the SF system, closing the licenses if any intimation to be sent to IT Department.	HR Manager
33	Human Resource	HR Helpdesk	Handling of basic HR related queries and concerns raised by employees	HR Manager

Sl#	Functional Area	Use Case	Use Case Description	Role
34	Human Resource	Recruitment source mix	Sourcing of profiles based on provided job descriptions	HR Manager
35	Human Resource	Employee Onboarding	Onboarding (document verification, alignment to reporting manager, seat allocation, emp id creation, entry of employee data in database) and Joining formalities for permanent and contractual workforce	HR Manager
36	Human Resource	OA Promotion Letter	Office Associates promotion details is fetched from appraisal excel, eligibility criteria & salary details are cross checked, promotion letter is created & printout of letter is taken.	HR Manager
37	Human Resource	Joining Note CMC	Note prepared for CMC members comprising of the details of people joined the organization. The information required to prepare this note is available in different forms which needs to be picked and then a standard note to be prepared.	HR Manager
38	Human Resource	Deputation Cycle Management	Update employee pay, benefits, perks and allowances based on deputation plans created	HR Manager
39	Human Resource	Candidate Connect	Managing important notifications and communications with prospective candidates	HR Manager
40	Human Resource	Appreciations and Awards	Creation of certificates of excellence and allocation of reward points based on manage recommendation	HR Manager
41	Information Technology	Backup Monitoring	An audit requirement where the machines need to be checked for the Backup files in different servers, this is a repetitive task which can be taken remotely for 'N' number of machines. Report the status of the backup to business user	IT Manager
42	Information Technology	IT Helpdesk	IT Helpdesk is a platform which is used to help employee to enquire about any query related to IT issues and needs to allocate as per policies to respective stakeholders like servicing the tickets (against queries by employees)	IT Manager
43	Information Technology	Asset Tracking	Real time tracking of allocated assets and permissions of usage. Timely software updates and patches	IT Manager

Sl#	Functional Area	Use Case	Use Case Description	Role
44	Information Technology	Expense Report	Generation of report regarding spend on procurement of assets, licenses, repairs etc. created to track against budget estimated for IT spend	IT Manager
45	Information Technology	Vendor Service Request Handling	Generation of service requests (complaints) with software, hardware vendors and tracking request lifecycles	IT Manager
46	Information Technology	System Audits	Perform system audits to identify malpractices if any	IT Manager
47	Information Technology	Application accessibility and availability	Check critical functions are working and accessible on the ecommerce website and monitor all critical IT application availability.	IT Manager
48	Information Technology	Share Drive Access Control Report	Report generated providing details on share drive access control information	IT Manager
49	Logistics and Distribution	STO Execution	Creation of Stock Transfer Order from 3rd party entities requesting for stocks to be moved into their premise for further processing	Supply Chain Planner
50	Logistics and Distribution	PGI	Processing Post Goods Issue (PGI) requests to facilitate movement of goods issued or drawn to customers.	Supply Chain Planner
51	Logistics and Distribution	E-Way Bill	Generation of E-way bills for transferring finished or semi-finished goods from the plant to the distribution centers or customer's warehouse.	Finance Manager
52	Logistics and Distribution	Truck Indenting	Planning of truck indents based on set of accepted business rules.	Supply Chain Planner
53	Logistics and Distribution	Dispatch Plan	Generation of plans for the dispatch of finished and semi-finished goods based on the zone of transfer, mode of transfer and transportation partner onboard.	Supply Chain Planner
54	Logistics and Distribution	Returns Management	Handling the return of goods, materials from customer site, retailers, distribution centers back to the company's storage area.	Supply Chain Planner
55	Logistics and Distribution	IBD flow report	Generate storage location wise report on inflow of supplies/materials on a daily basis	Supply Chain Planner
56	Logistics and Distribution	Shipment Tracker	Real time tracking of shipments, point of docking, issues/queries raised at point of docking	Supply Chain Planner
57	Logistics and Distribution	Salvage Reports	Generate salvage reports on a regular basis to identify major bottlenecks/concerns (if any)	Supply Chain Planner
58	Logistics and Distribution	Truck Top-Up Updation	Details are fetched from the system for all the sales order that had not been	Logistics Executive

Sl#	Functional Area	Use Case	Use Case Description	Role
			converted to delivery order. Further the truck loading details are mapped & truck top up details updated in the system.	
59	Logistics and Distribution	Indent vs Placement report	Indent details for trucks w.r.t source, destination etc. are matched with the placement details & further report is created. For creating this report, the data dump taken from system & further excel analysis, business rules are applied & final output report is created.	Logistics Executive
60	Logistics and Distribution	Delivery Advice Process (DA)	Delivery advice is created post sales order upload & confirmation. Data is extracted from system & complete details are updated in excel & further shared with stakeholders.	Logistics Executive
61	Logistics and Distribution	Delivery Order status report	Delivery order status report provides details of the products delivered. For this report, data dump taken from system & further excel analysis, business rules are applied & final output report is created.	Logistics Executive
62	Logistics and Distribution	Direct Dispatch Tracker	Direct dispatch is referred to one source one destination dispatch. A tracker is maintained for all such dispatches for which data dump is taken from ERP system, excel analysis done, business rules are applied & final output report is created.	Logistics Executive
63	Logistics and Distribution	Stock transfer movement status report	Stock transfer movement detailed report is created especially for the stocks transferred to the converters. For this report, data dump taken from system & further excel analysis, business rules are applied & final output report is created.	Logistics Executive
64	Logistics and Distribution	Order Execution & order return status report	Order execution & order return details report is created based on the order details received from manufacturing & conversion units. The data is captured from the order receipt bill/handheld device, verified final report is created accounting complete details on orders (including damage etc.)	Logistics Executive
65	Logistics and Distribution	Automation for verification of receipts for purchase orders, shipping notices &	Verification of receipts of PO & Shipping notices for validation of order details, entry into ERP system and segregation of orders & further identify the shelf space.	Logistics Executive

Sl#	Functional Area	Use Case	Use Case Description	Role
		segregation of orders		
66	Logistics and Distribution	Invoice Creation before dispatch	Automation in preparation of invoices, flagging the orders as packed/shipped. Extracting information from multiple sources & generating invoices	Logistics Executive
67	Logistics and Distribution	Data extraction from Invoices	Extracting data from multiple formats of invoices and creating a central data base in ERP	Logistics Executive
68	Logistics and Distribution	Warehouse Equipment Service reminders	Automation in service reminders of warehouse equipment, shipment status updates	Warehouse Manager
69	Manufacturing	Demand & Supply Planning	Collecting data from multiple sources for preparing the estimates format, post which the estimates can be used to make the supply planning files and share the stakeholders to monitor the days of inventory	Supply Chain Planner
70	Manufacturing	Fault Assessment Reports	Report generation on frequency of faults, types of faults, MTTR	Product development manager
71	Manufacturing	Warehouse utilization report	Capture performance of warehouse i.e. capacity utilization, inventory plans etc.	Warehouse Manager
72	Manufacturing	Weekly Pipeline Report	Pipeline Report of Raw material, Work in Progress and Finished Goods to ascertain the inventory flow and status	Production Manager
73	Manufacturing	Notional Ratio/ Gross Ratio report	This report is used to ascertain the production vs planned ratio factory wise as notional ratio vs Gross Ratio. The metric would be generated at two levels a) Actual against system generated plan b) Actual against user generated plan Input parameters • System generated production plan • Final uploaded Production plan • Actual Production Plan	Production Manager
74	Manufacturing	SKU creation	New SKU creation requires inputs from Finance, Mktg and Supply Chain as per standardized format post which this template is sent to master data creation team.	Production Manager
75	Manufacturing	Inventory Reconciliation	Reconciliation of the physical inventory with the inventory in the system, performed majorly for the critical and A Class items	Production Manager

Sl#	Functional Area	Use Case	Use Case Description	Role
76	Manufacturing	SKU Master Creation	New SKU creation requires inputs from Finance, Mktg and Supply Chain as per standardized format post which this template is sent to master data creation team.	Category Planner
77	Manufacturing	Order Fulfillment	Segregating the orders, updating of inventory status in real time to all the internal teams for decision making and action like a Days of Cover under standard safety stock to provide a trigger	Production Manager
78	Manufacturing	Quality Reports	Perform basic quality control checks on raw materials, semi-finished goods etc.	Quality Controller
79	Manufacturing	Daily Power Report	Generate daily power consumption report for better visibility on operational timelines and possible optimization plans (if any)	Production Manager
80	Manufacturing	Water Consumption Report	Generate daily water consumption report for better visibility on operational timelines and possible optimization plans (if any)	Production Manager
81	Manufacturing	Fuel Status Report	Collate and generate fuel consumption, fuel storage, fuel stocking report	Production Manager
82	Manufacturing	Manufacturing Schedules	Generate schedules for running productions, report mean time between runs, report discontinuity for a SKU run	Production Manager
83	Manufacturing	Daily Stock Reporting	Generate reports on stock consumption, stocks ordered, stocks sent back with complaints	Production Manager
84	Manufacturing	Scrap Reporting	Generate reports on broke/scrap items and conduct comparative analysis	Production Manager
85	Manufacturing	Material Traceability Reports	Real time tracking of plant to plant movement of raw materials and SFGs, storage location determination	Production Manager
86	Manufacturing	Insurance Requests	Raise insurance claims in case of damages to insured company assets with submission of substantiating collaterals (as necessary)	Production Manager
87	Manufacturing	Display Purchase Info Record Metrics	DPIR reports to capture variances (if any) between planned and produced items	Production Manager
88	Manufacturing	Fill Rate Reports	Generation fill rate reports and comparative of analysis of deviation of service level indicator	Production Manager
89	Manufacturing	Finished Good/Raw materials ageing report.	Aging report is prepared for finished goods & raw material. For creating this report the data dump taken from system & further excel analysis, business	Production Manager

Sl#	Functional Area	Use Case	Use Case Description	Role
			rules are applied & final output report is created.	
90	Manufacturing	Stock-on-hand report	This report is used to derive the stock availability at each node for decision making & further production planning. For this report, data dump taken from system & further excel analysis, business rules are applied & final output report is created.	Production Planner
91	Manufacturing	Daily factory production report	This report is created to identify daily production (FG) details which provides information on plan vs produce, defects, raw material consumed etc. For this report, data dump taken from system & further excel analysis, business rules are applied & final output report is created.	Production Manager
92	Manufacturing	Material Variance Report	Reporting on the variance in material consumption (Planned vs Actual) based on BOM. Details are fetched from ERP system, excel analysis done, business rules are applied & final output report is created.	Production Manager
93	Manufacturing	Inventory Adjustments	Automation in updating product details & quantity counted during inventory counting process.	Production Manager
94	Manufacturing	Order Fulfillment	Automation in segregating the orders, updating of inventory status in real time.	Production Manager
95	Procurement	GRN Entry	Data extraction and entry creation on receipt of good receipts note for further matching against PO and Invoice	Warehouse Manager
96	Procurement	Purchase Order Creation	Creation of purchase orders for procurement of supplies	Buyer
97	Procurement	Inbound Delivery	Manage the material inflow into the warehouse	Materials Manager
98	Procurement	Commodity Buying stock report	Generate of purchase reports for review on budgeted vs actual buying expenses	Buyer
99	Procurement	Sourcing Report	Generate report on the different types of transactions (purchase, return) run across different vendors and suppliers	Buyer
100	Procurement	Purchase Requisition Creation	Post the completion of planning, final estimate is shared with user & further purchase requisition is raised in SAP	Buyer
101	Procurement	Info record Creation	Info record creation is done in SAP in which SKU master data is created (has complete SKU information - ingredient details, packaging details etc.) & further sent for approval through automated workflow.	Buyer

Sl#	Functional Area	Use Case	Use Case Description	Role
102	Procurement	BOM Updation	In case of change of Raw materials, BOM is required to be updated. As per details the BOM is updated in excel, further sent for approval & once approved the details are updated in ERP system.	Buyer
103	Procurement	Merchandising order processing system	Merchandising Order planning system is used to indent the PR for receiving vendor quotations and subsequently analyze the output for vendor selection.	Buyer
104	Procurement	Imported Material Planning & Ordering System	Imported material planning & ordering system to be automated. In this process data is taken from multiple sources, process details, BOM etc. & analyzed, final details are prepared.	Buyer
105	Product Development	Prototype Test Reports	Report generation on the different types of tests performed on the prototype and identification of variances based on the pre-defined performance models	Product development manager
106	Product Development	Documentation and validation of the design specifications	Generate blueprints of the product based on the capture and desired specifications of the product	Product development manager
107	Product Development	Product Label Printing - pallets/bundles	Capture design specification and create print requests	Product development manager
108	Sales and Marketing	S&OP estimation	Preparation of the data for S&OP Estimation, Data to be collated from various sources for Potential Sales vs Forecasting Vs Production Requirements to arrive at decision making and needs to be prepared before a stipulated time.	Supply Chain Planner
109	Sales and Marketing	Sales binder	This report is created for standardization of sales records as per estimate formats, the report is made by amalgamation of data from various sources.	Procurement Planner
110	Sales and Marketing	Benefit Programs	Allocation of rewards/benefits to distributors/retailers meeting pre-set targets	Marketing Manager
111	Sales and Marketing	Trade Marketing	Analytics in identification of products as per seasonality, customer segmentation, digital marketing across channels including websites, e-mail and social media platforms and reporting across to stakeholders	Category Manager
112	Sales and Marketing	Multi- Language Promos	Creation of multi-language promos for products distributed to different zones	Marketing Manager
113	Sales and Marketing	New Product sales summary	During the launch of new product, companies identify a parallel product, sales metrics & create the sales forecast	Sales Manager

Sl#	Functional Area	Use Case	Use Case Description	Role
			for new product. Post launch of new product sales summary is prepared to showcase the estimate vs sales on daily basis.	
114	Sales and Marketing	Promotion & Inventory Planning	Automation of data capture of the requests from the CRM, validation and updating of data in the systems of records	Marketing Manager