

# Auxis AI & Automation CoE Harnesses Agentic AI & More to Transform CPG Enterprise, Unlocking Millions in Revenue & Savings

## Client Profile

Our CPG industry client is one of the largest manufacturers, sellers, and distributors of a global beverages company. The client's multibillion-dollar business encompasses more than 600 products, as well as an exclusive territory of more than 21 million consumers. The company employs more than 5,000 associates across four manufacturing facilities and 18 sales and distribution centers, powering the main business and three operating companies.

## Business Challenge

**Resetting a disappointing start to automation with the right AI platform and partner**

After an unsuccessful introduction to automation with another automation platform and a large, Asia-based delivery partner, the CPG company was looking to reset. Business was booming and, despite the disappointing start to its automation journey, company leadership remained confident that enterprise-wide AI-powered automation with the right platform and partner was essential for keeping pace – streamlining operations, turbocharging productivity, closing quality gaps, and boosting scalability without a proportionate increase to costs.

Initially, the client tapped Auxis to re-evaluate its automation challenges and opportunities and help strategize a new path forward. A **Platinum Partner to UiPath**, the **#1 intelligent automation platform**, Auxis brings a proven track record of helping businesses reach new heights of automation and the full potential of artificial intelligence (AI) at work.

Auxis stands among the **top 1% of partners globally** who have achieved both of UiPath's highest Platinum and USN accreditations – underlining its high-quality deployments, expert innovation, and sustainable results. In 2024, Auxis was recognized as **UiPath's Foundational Americas Partner of the Year** for its exceptional ability to place AI and automation at the foundation of business innovation and success.



Auxis' deep knowledge and experience with UiPath's AI and automation tools helped the CPG client feel comfortable choosing UiPath's powerful Business Automation Platform as the right solution for unlocking the maximum potential of an automated enterprise.

Impressed with Auxis' expertise, the client also selected Auxis to reinvigorate its journey to global transformation by spearheading a **reimagined AI and Automation Center of Excellence (CoE)** program. **All departments and functions** across the CPG enterprise and its three operating companies were in scope, with Auxis leading continuous discovery, solutioning, implementation, and ongoing support.

Auxis' **onshore and nearshore delivery model** was also key to the client's decision, overcoming rising costs and tech labor shortages in the U.S. without sacrificing real-time collaboration, top-quality certified talent, or customer experience.








## Solution & Approach

Standing up a well-structured UiPath Center of Excellence to drive AI & automation enterprise-wide

In the first six months of the project, Auxis established a **transformational AI CoE** that kicked the client's stalled automation program back into high gear.

Too many automation journeys fall short of potential outcomes because excited stakeholders innovate in silos instead of planning impactful, scalable change. The Auxis Intelligent Automation CoE acts as a centralized, scalable team focused on streamlining automation output, providing structure to the journey, standardizing processes and procedures, sharing best practices, and ensuring robust governance.

Auxis built its CoE on best practices that ensure an efficient and sustainable structure capable of turning the client's vision for transformation into a working reality across the entire enterprise. That includes:

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**Continuous discovery of new opportunities aligned to the client's business goals.** Regular meetings with business leaders identify what stands in the way of operational excellence and demonstrate "the art of the possible" with UiPath capabilities.
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**Effective pipeline management** ensuring discovery is a loop, not a linear progression. Auxis implemented a streamlined process for continuous idea submission and vetting – performing a deep dive assessment of possibilities every quarter – to maintain a constant backlog of approved automation candidates for the AI and Automation CoE.
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**Prioritizing the pipeline** with ongoing calculation of KPIs and value realization to support data-driven decisions, ensuring every project achieves efficiency, cost savings, and business objectives.
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**Measuring value realization** with tailored reporting and historical data analysis to quickly make course corrections, identify trends, prove value to the business, and **maximize returns**. Auxis' customizable, interactive dashboards monitor KPIs and metrics that also help identify when business users are not executing based on their new automation capabilities, allowing the CoE to offer guidance.
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**Change management initiatives** designed to foster excitement throughout the business. Besides reinforcing the benefits of AI and automation for improving daily work lives, Auxis helps identify the potential for elevated roles after AI and automation technology is implemented, provides training materials, and remains available for ongoing support.





## Auxis identifies single automation opportunity expected to add \$5 million+ in revenue

Out of the gate, the Auxis automation CoE team collaborated with the client to identify a single automation opportunity that is expected to **deliver a staggering \$5 million to \$7 million in revenue recognition** by itself.

### Business Challenge

The client can force-ship products to retailers and require shelf/floor space without prior approval under specific circumstances, such as seasonal promotions or to promote new products. In a single quarter, this process can generate tens of thousands of orders.

However, the client's highly manual process was prone to data entry errors and approval bottlenecks that triggered inaccurate shipments, duplicate deliveries, shipment delays, and inconsistent delivery of new products across stores – leading to revenue spillage and wasted inventory.

**Out of 1.17 million orders force-shipped by the client in a particular quarter, 90,000 had errors. Teams spent an average of 30 minutes reworking each order, with many orders never fulfilled. Lack of visibility into order status and issues** also made it difficult for teams to track progress and address issues proactively.



### Auxis Solution

Auxis used UiPath Intelligent Automation to orchestrate the end-to-end force-ship process, dramatically improving quality with increased efficiency:

- > A custom user interface structures user interactions with data controls.
- > Pre-filled order details ensure consistency.
- > Execution cadence is aligned with planning and production windows.
- > Automated validations and workflow approvals eliminate bottlenecks.
- > SAP integration ensures accurate order updates.
- > Real-time tracking and alerts for proactive issue resolution.

**Key expected benefit:** \$5 million–\$7 million in additional revenue.

**Hours saved:** 12,000+ per year, with time spent on manual inputs reduced by 85%.

**Key quality improvement:** Eliminating the 20% error rate that leads to shipping delays, inconsistent delivery of new products, inaccurate or duplicate orders, wasted inventory, and revenue spillage.



## Powering next-gen sales support with Agentic AI for smarter, faster results

In partnership with UiPath, Auxis is pushing the client to the forefront of innovation in the CPG industry with plans for a **digital sales assistant powered by emerging Agentic AI technology**. Heralded as “Act Two” of automation, Agentic AI empowers advanced robots, or agents, with an unprecedented ability to independently learn, make decisions, adapt to changes, and act with minimal human supervision – transforming how businesses can approach problem-solving and process optimization.

But most companies are still struggling to realize expected value from better-known AI technologies like Generative AI and machine learning – and agentic takes AI’s capabilities to the next level. As a Platinum Partner to the Agentic AI pioneer, UiPath, Auxis is helping the client pave the path to agentic success – bringing early access and proven results with emerging tech innovation.

### Business Challenge

The client’s sales representatives need critical sales data and store information at their fingertips as they visit customer locations, ensuring shelves are properly stocked and new sales orders reflect demand. However, mining historical data from multiple company systems is a time-draining and cumbersome task, impacting sales teams’ preparation and customer engagement.

Most sales teams rely heavily on the Salesforce CRM via their phones during store visits – causing them to spend too much time at each location and visit fewer customers per day. It is also hard to remember everything they needed to talk about at each location, leading to missed opportunities.



### Auxis Solution

Auxis and UiPath are leveraging the power of Agentic AI to create a next-gen digital sales assistant for the client. Here’s how it will work:

- > Sales reps tell the Agentic AI model which location they are about to visit via voice or chat.

- > Agentic AI directs RPA to collate real-time sales data and store information from multiple data sources.

- > The AI analyzes all data points relevant to the location and generates a response detailing what the sales rep needs to know and cover to drive the best results at each visit.

- > The AI response is delivered via a voice-capable or chat-capable bot, making it easy for sales reps to get information they need on the go.

**Expected quality improvement:** Sales merchandisers can increase sales and revenue recognition by covering higher-value topics during store visits, ensuring key opportunities are not missed.

**Key expected benefit:** On-demand access to real-time sales data leads to optimized sales orders and better customer experiences.



## Other key automation pipeline innovations at the Auxis AI Center of Excellence include:



### AI-powered Intelligent Document Processing (IDP) takes over tedious training verifications

- > The client's **5,000+ employees** must undergo job hazard training annually – and again if they switch jobs – with **six staff members scrambling to manually verify compliance once per year**. Auxis is leveraging UiPath's **AI-powered Document Understanding** to automatically verify if employees and supervisors signed and completed the required training certification on a rolling basis every week, elevating the client's staff to more important work.



### Communications Mining discovers improvement opportunities

- > AI-powered Communications Mining analyzes the overwhelming amount of business communications for actionable insights. A **Communications Mining** assessment Auxis conducted on the client's shared mailboxes uncovered multiple opportunities for greater efficiency with automation, including:
  - > The biggest volume of repetitive emails in the client's customer master data inbox involves receipt of W-9 forms, with a **team of four people processing about 50 forms per day unable to keep up**. Auxis created an automation to identify W-9 forms in the mailbox, validate form data, and feed the validated data into the client's enterprise resource planning (ERP) system for further processing.
  - > Auxis created an RPA workflow to extract data from non-trade export sales order forms received in a shared mailbox and build orders in the ERP system, **saving the client about 500 labor hours per year**.







### RPA eliminates 85% error rate in sales hierarchy updates

> Updating the sales hierarchy record is key to ensuring the sales merchandise team receives the right schedules and routes each week, keeping customer and supplier relationships – and product sales – on track. However, the process is heavily reliant on field personnel to fill out relevant spreadsheets accurately and on time – triggering an **85% error rate that mandates time-consuming rework**. Auxis is leveraging RPA to automate updates to the sales hierarchy record – eliminating the alarming error rate and **saving staff 2,000+ hours of tedious manual work per year**.



### Leveraging AI and RPA to optimize merchandising service nationwide

> At larger stores capable of storing merchandise, the client sends a dedicated merchandising service to stock shelves after delivery. To avoid forcing drivers to waste time stocking shelves at stores with space constraints, the client was piloting a “drop and go” model to coordinate merchandisers arriving onsite as deliveries were made. But this program brought multiple challenges, with inaccuracies in delivery schedules or lead times triggering inefficient route planning, missed windows, and unhappy customers. Auxis is planning a solution leveraging AI and RPA to build and optimize an application the client can roll out nationwide that’s capable of helping sales merchandisers plan the most efficient route, make real-time adjustments, identify process bottlenecks, and track program performance.





### RPA boosts DOT compliance, identifying and correcting false violations

> To maintain Department of Transportation (DOT) compliance, the client's distribution supervisors are tasked with pulling and uploading vehicle inspection reports and hours of service for a fleet of 1,300+ drivers. Data gaps triggered compliance penalties, while inefficient record-keeping made it hard to locate information quickly. Auxis used RPA to automate the process and create a searchable database, **saving the client 9,300+ hours of work and an estimated \$370,000+ per year**. The automation further **identified 15% of reported driver violations as false, enabling correction**.



### Catching discrepancies in critical customer data

> Client staff manually compared information in the customer master database with information pulled from other internal systems - **identifying 200-300 discrepancies per week**. With a clean customer master database essential to accurate, complete, and fraud-free records, Auxis automated the process of pulling and comparing data and updating the database.



### New process increases product visibility

> Auxis identified an opportunity to drive informed decision-making with new visibility into data and records sent by a major customer. An Auxis automation collects and uploads previously unused data from inventory and point of sale (POS) files the customer sends daily, providing previously unavailable insights into daily inventory flow at the customer's locations.





## Results

### Auxis AI & automation expected to deliver millions in savings and revenue in the first year

Auxis rebooted the client's lackluster introduction to automation – unleashing a successful journey to infuse AI-powered transformation across every facet of the client's organizations. With Platinum-level UiPath expertise, a business-led strategy, and a structured CoE-driven approach, Auxis has proven to be the ideal partner for managing a large, complex, ongoing, cross-enterprise program that can scale as the business grows – continuously unlocking business improvement opportunities for the client.

Even as the program continues to ramp up, key benefits it has achieved by automating processes thus far include:

#### \$1.5 million+ in expected cost savings in the first year

The client projects a **very conservative estimate of more than \$1.5 million in cost benefits** in the first year alone – equivalent to **58,000 hours of saved labor**.

#### \$5 million+ in revenue recognition from a single automation

Auxis' force-ship automation alone is expected to deliver **\$5 million to \$7 million in revenue recognition** for the client. It eliminates a 20% error rate that led to shipping delays, inconsistent delivery of new products, inaccurate or duplicate orders, wasted inventory, and revenue spillage.

#### Continuous opportunity pipeline drives foundational transformation

Auxis' AI & Automation Center of Excellence maintains about **20 business-critical opportunities** at various stages of development in its pipeline, as well as an additional **master list of nearly 80 automation opportunities that is expanding rapidly**. Auxis drives continuous innovation by ensuring the automation pipeline has a consistent backlog, working on 3-4 process automations at a time while keeping 5-6 processes approved so they can be worked on next.

#### Supporting growth without additional headcount

The **significant efficiency, accuracy, and productivity gains** delivered by Auxis' automation and AI initiatives are helping the client keep pace with its accelerated growth without a corresponding increase to headcount and costs. For instance, **eliminating the 85% error rate** that caused extensive rework in the sales hierarchy update process and **saving 9,300+ hours of work** by automating a DOT compliance process.

#### Global transformation aligned to business goals

While many automation partners just have technical expertise, Auxis brings nearly **three decades of business transformation experience** honed by a unique perspective as experienced advisors, shared services operators, and industry veterans. The client benefits from process optimization and automation initiatives aligned to business goals, gaining automation solutions that not only help it work faster, but smarter. At a time that most companies are struggling to realize value from their AI investments, Auxis' CoE is also focused on ensuring the client achieves targeted outcomes: assessing and prioritizing opportunities based on factors deemed important to the business, measuring results, and providing effective governance.



### Cutting-edge innovation keeps business ahead of the curve

Auxis is dedicated to helping clients **maintain a competitive edge by standing as innovation leaders** in their industries. As a UiPath Platinum Partner, Auxis gains early access and expertise on the latest automation trends and capabilities – **enabling the client to reap the benefits of Agentic AI adoption**. In today's fast-evolving landscape, Auxis also leverages its partnership with UiPath to **prevent clients from getting locked into a single AI model**, taking advantage of the platform's connectors to all the leading Generative AI solutions to test what works best for each use case.

### Empowering citizen development

Citizen developers are key to advancing enterprise automation on a global scale. The Auxis CoE is helping the client establish a citizen developer program through UiPath, empowering the people in the weeds to identify and automate simple processes that don't provide enough transformational impact to rank as a CoE priority. The Auxis Center of Excellence team offers guidance, governance, and regular training sessions with CoE developers, leveraging UiPath's Autopilot capabilities to help the client's employees learn to create simple automations without any software development experience.

**Want to further explore the benefits of building an Automation and AI Center of Excellence and achieve enterprise-wide transformation?**

**Schedule a consultation with our intelligent automation experts today!**

**Or, visit our resource center for tips, strategies, and success stories of other AI and automation projects.**

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