Enterprise efficiencies with AI

Nir Manor · Transformational Retail

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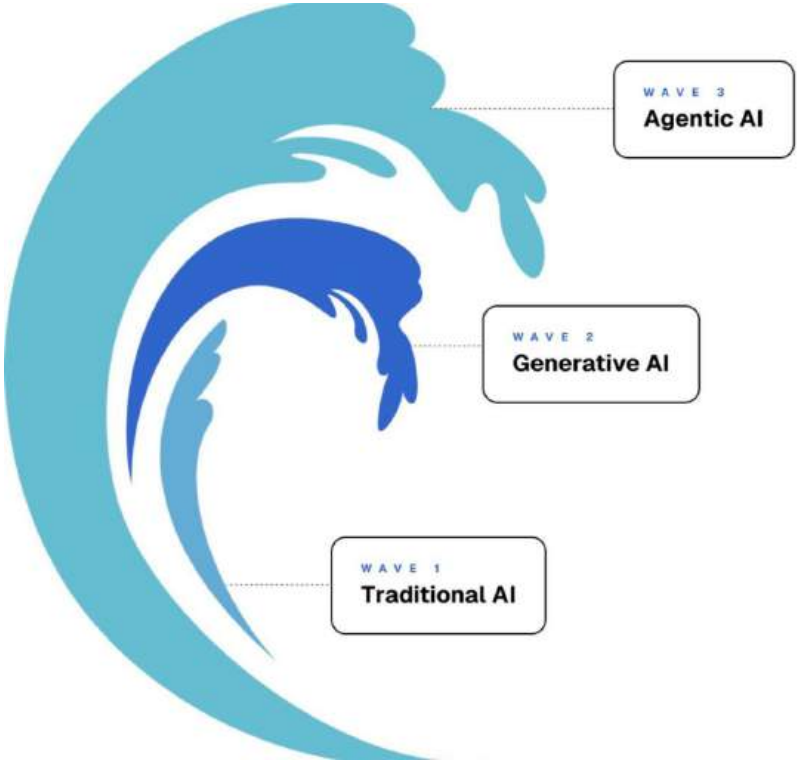
AI waves

Agentic AI Enables to manage and control reality.

Generative AI Create and interact with reality.

Traditional AI Allowed analysis and predictions.



Essential attributes of AI Agents

Autonomy

Performs objective-oriented tasks with limited human supervision.

Reasoning

Situation-aware decision processes, discretionary choices & compromise considerations.

Adaptable Planning

Continuously modifies plans in response to evolving circumstances to fulfill processes efficiently.

Context Understanding

Interprets and responds to natural language and other modalities.

Action Enabled

Authorized to implement actions through integration with online platforms providing competencies.

10 core GenAI Use Cases for Retail/CPGs in 2025

01 Create new opportunities

- Data monetization
- Redefining and accelerating product development

02 Optimize operations

- Products descriptions and visuals
- Democratize data access and analysis
- Agentic AI for various enterprise tasks

03 Reinvent Supply Chain

- Demand Forecast 3.0
- Retail planning optimization

04 Improve Customer Experience

- Personalization at scale
- New research trends
- Strengthen working teams

Examples

Enterprise automation: AI-Agents examples

Integration Coordinator Agent

Manages and streamlines integrations across various enterprise systems like ERP, CRM, SaaS, cloud, on-premise, and legacy platforms.

Sales Pipeline Agent

Manages the sales pipeline by analyzing leads, predicting conversions, and automating follow-ups.

Compliance & Risk Agent

Monitors and ensures compliance with industry regulations and internal policies across all systems and workflows.

HR & Workforce Agent

Automates HR tasks like recruitment, onboarding, payroll processing, time-off management, and performance evaluations.

Financial Controller Agent

Automates financial tasks such as budgeting, forecasting, reporting, and revenue recognition by integrating data from multiple financial systems.

Challenges

AI Agents will be everywhere, but the challenges are:

01

Integration with legacy systems

The challenge is to seamlessly connect to the enterprise backend, which mostly has legacy and/or on-prem systems.

Complicated integrations to ERP, billing systems, and proprietary databases pose significant hurdles for AI agents.

02

Security challenges

Security challenges include cyber risk and data security breach.

03

Corporate policy

AI agents to act as per corporate policy related to the subject in case.

Innovation

AI-Powered Financial Operations

Unlocking new possibilities

Enterprise-grade flexibility

Works across cloud, on-prem, and hybrid environments.

No-code simplicity

AI-driven automation that can be deployed and managed without IT involvement.

Seamless AI coordination

Enables finance teams to leverage AI for more intelligent, adaptive decision-making.

Scalable & secure

SOC 2 certified, ensuring compliance and security for financial operations.

Automation

AI Agent orchestration – Use Cases

Procure-to-Pay (P2P)

Automation of procurement workflows, connecting ERP (NetSuite, SAP, Priority) to procurement platforms (ZIP, Coupa).

Order-to-Cash (O2C)

Orchestrate end-to-end sales-to-finance process between CRM (Salesforce, HubSpot) and ERP systems.

Data Enrichment & Automation

Automate data flows, validation, enrichment across multiple SaaS & internal databases.

Customer Support

Automation for Zendesk, ServiceNow, Freshdesk to ensure proactive CS.

Smart Data Mapping

Helping SaaS companies integrate with ERP/CRM systems of their clients.

Procurement & cash management challenges

- More purchasing autonomy by numerous departments
- Countless vendors
- Overspending (mainly before issuing a PO)
- Cross-team approvals and risk reviews
- Unclear ordering process and law orchestration

Procure-to-pay (P2P) – Use Case

Automation of procurement workflows	Connecting ERP (NetSuite, SAP, Priority) to procurement platforms (ZIP, Coupa).
Vendor performance analysis	AI Agents analyze historical vendor performance, pricing trends, and order urgency to recommend or automatically select the best supplier for each order.
Invoice discrepancy resolution	Flags discrepancies when invoices don't match purchase orders or delivery receipts, classifies the issue, and resolves it or escalates to procurement.
Inventory shortage prediction	Predicts shortages based on sales trends, supplier lead times, and seasonal fluctuations, triggering POs before shortages occur.

Walmart Case Study – P2P

AI deployment in procurement

Walmart deployed an AI negotiation agent in its Procure-to-Pay process, transforming how supplier contracts are managed.

Challenges in procurement

About 20% of suppliers were on standard, non-negotiated contracts, and most processes were manual, slow, and prone to mistakes.

Achievements and savings

The AI negotiator closed deals with 68% of suppliers, achieving 3% cost savings and extending payment terms by 35 days, leading to millions in savings.

AI Applications

Order-to-Cash (O2C) - Use Case

End-to-End Sales-to-Finance

Orchestrate processes between CRM (Salesforce, HubSpot) and ERP systems for seamless operations.

Automatic Payment Term Adjustments

AI Agents analyze past payment behavior, market conditions, and risk scores to auto-adjust payment terms before a new contract is signed.

Contract Scanning for Compliance

AI scans new customer contracts to identify missing details, inconsistencies, or compliance risks before they are approved.

Self-Learning Invoice Matching

AI Agents match invoices to contracts and deliveries, using NLP-based document processing, auto-fixing common discrepancies.

Predictive Payment Follow-Ups

AI predicts late payments based on customer behavior and adjusts outreach strategies dynamically.

Case Study

Siemens Case Study – O2C

SIEMENS

AI in cash collection

Siemens uses AI for collection of cash from thousands of clients worldwide.

Pain points before AI

High write-offs rate, delayed payments causing cash flow problems, and heavy manual workload on financial teams.

AI-Driven automation

Dynamic risk assessment, reconciliation of documents, and personalized payment follow-up have been automated.

Results achieved

20% reduction in delayed payments, over 10% reduction in write-offs, improved cash flow predictability, 25% reduction in manual work.

Comparison

AI vs. rule-based automation

What differentiates them?

Dynamic decision-making

- AI adjusts credit risk assessments in real-time. It responds to changing payment behaviors before problems occur.
- Rule-based systems rely on static thresholds. They can't adapt to evolving situations.

Natural Language Processing (NLP)

- AI extracts key points from unstructured text. It catches discrepancies in contracts that algorithms miss.

Predictive analytics

- AI predicts payment behavior and prioritizes accordingly.
- Personalizes collection strategies for each customer.

Product Description - Use Case

Automated Content Generation

Automatically generate, optimize, and personalize product descriptions, images, and category content across e-commerce platforms and digital catalogs.

Natural Language Generation (NLG)

Based on product specs, AI creates SEO-optimized and customer-tailored descriptions in multiple languages.

Visual AI Tools

Automatically generate lifestyle images or product mockups using product metadata.

A/B Testing

Continuously test variants of titles and descriptions to improve conversion rates.

Omnichannel Adaptation

Tailors messaging for specific channels (e.g., mobile, desktop, social media) using customer behavior insights.

Results

Less manual workload, shorter T2M for new products, enhanced customer engagement, CVRs, ensured consistency and personalization across all digital touchpoints.

Case Study

The Home Depot Case Study – Product Descriptions

Challenge

Managing content for over 2 million SKUs. Ensuring consistency, SEO performance, and personalization at scale.

AI Use

Create and optimize product descriptions, images, titles, and long-form content. Tailored content to customer personas using behavioral insights. A/B tested variants to maximize conversion rates.

Results Achieved

Significant reduction in manual work. Increased conversion rates on product pages. Improved organic search visibility. Faster product onboarding with reduced manual workload. Consistent, personalized messaging across channels.

Customer Service challenges

01 Manual and hard to scale

02 Long SLAs that reduce CSAT

03 Bad reviews that damage brand reputation

04 Hard to train with high employee churn

→

Expensive to maintain

Sub-optimal CSAT that hurts sales

NLP/LLM, integrations, personalized process

LLMs

Recipient

Item type

Special occasion

I bought my husband a pair of boots for his birthday, he wore them for a few hours to see how they felt and he said that they were too small. I would like to exchange them for half a size bigger please!

Reason for exchange

Item was worn

Action

Requested size

Getting info from multiple integrations

shopify — Searching order with **boots** → order #24345

shopify — Ordered **boots** size → 8.5 → half a size bigger → size 9

ChannelApe — Checking inventory for size 9

Taking actions using APIs

loop — **Exchange** Legend Boots size 8.5 → 9

Happy Returns — Issue a **return label**

Generative AI

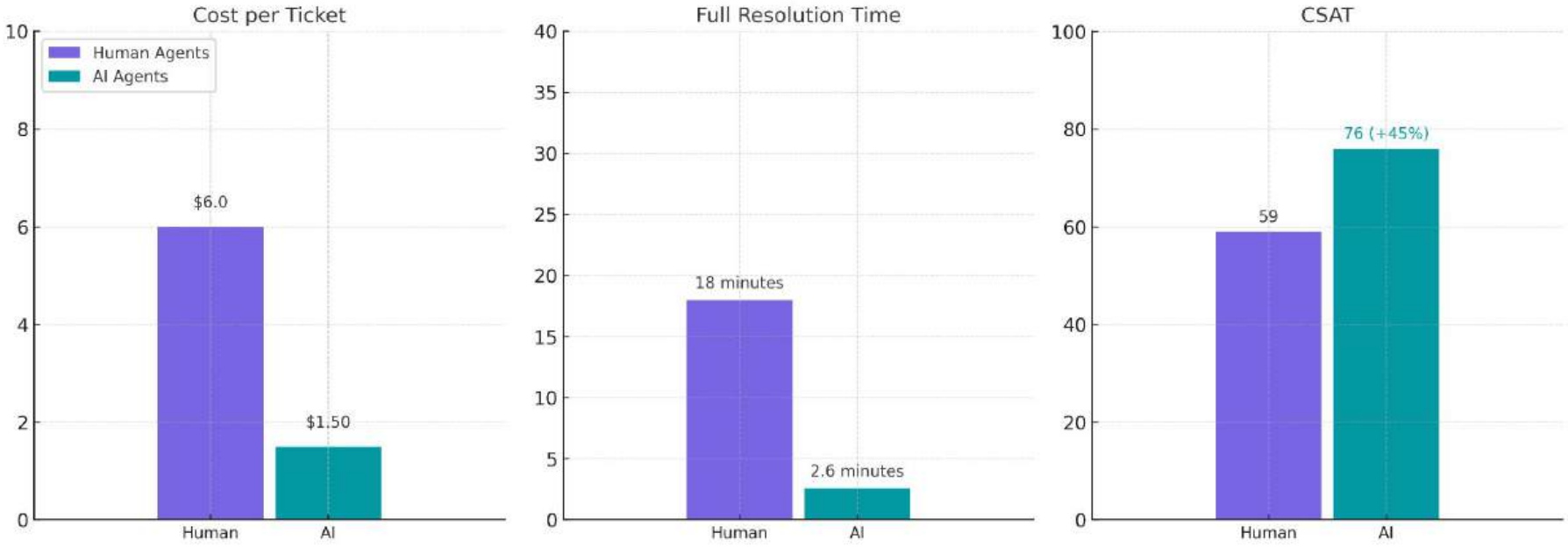
Hey Jane,
I'm sorry to hear the size of the boots from order #24345 did not work out for your husband. I've gone ahead and started the exchange process for new Legend | Black boots in a size 9. Please see the Happy Returns shipping label here.

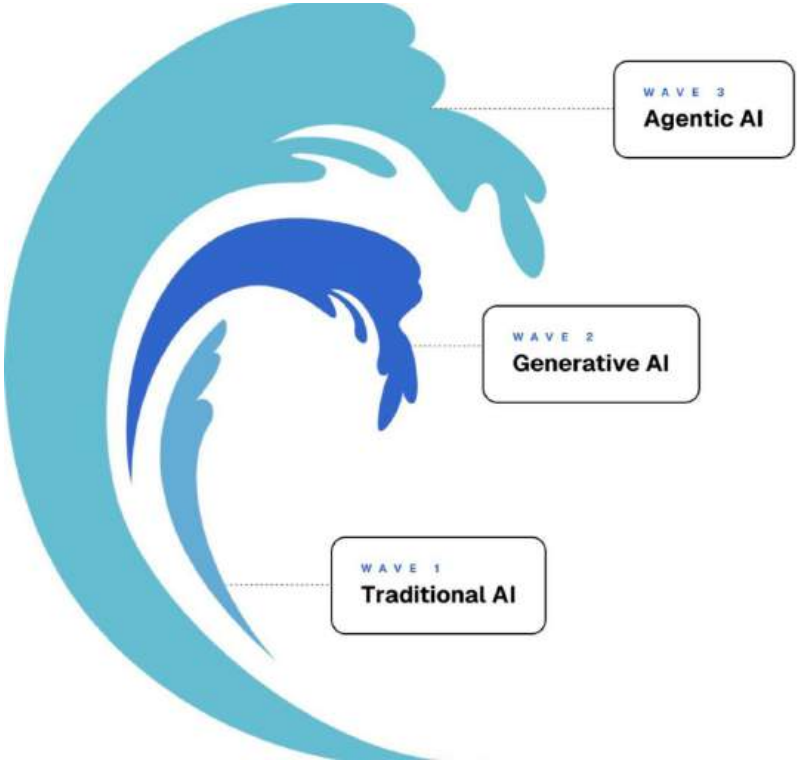
AI generated response

...and please send happy birthday to your husband!

Zendesk

AI Agent's CSAT vs. Human Agent's





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You can't stop the waves, but you can learn to surf

Jon Kabat-Zinn

Scan & let's
connect on LI

Thank you!

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