BeatRoute

AI Toolkit *for*

Retail Brands' CIOs and CDOs

This toolkit guides retail brands' CIOs through AI adoption, covering available AI options, tailored strategies for different organization sizes (including build vs. buy), ROI justification, and key team roles for successful integration.

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AI Options: Corporate Centralised AI & SaaS Embedded AI

Retail brands have two primary AI approaches. Understanding their differences is critical for selecting the right balance for your business needs.

Corporate Centralised AI

Runs on data aggregated from multiple sources (ERP, SFA, DMS, HRMS, E-Comm) to deliver AI use cases leveraging cross functional data.

SaaS Embedded AI

Shipped by individual SaaS product themselves, trained on data scope covered by the platform.

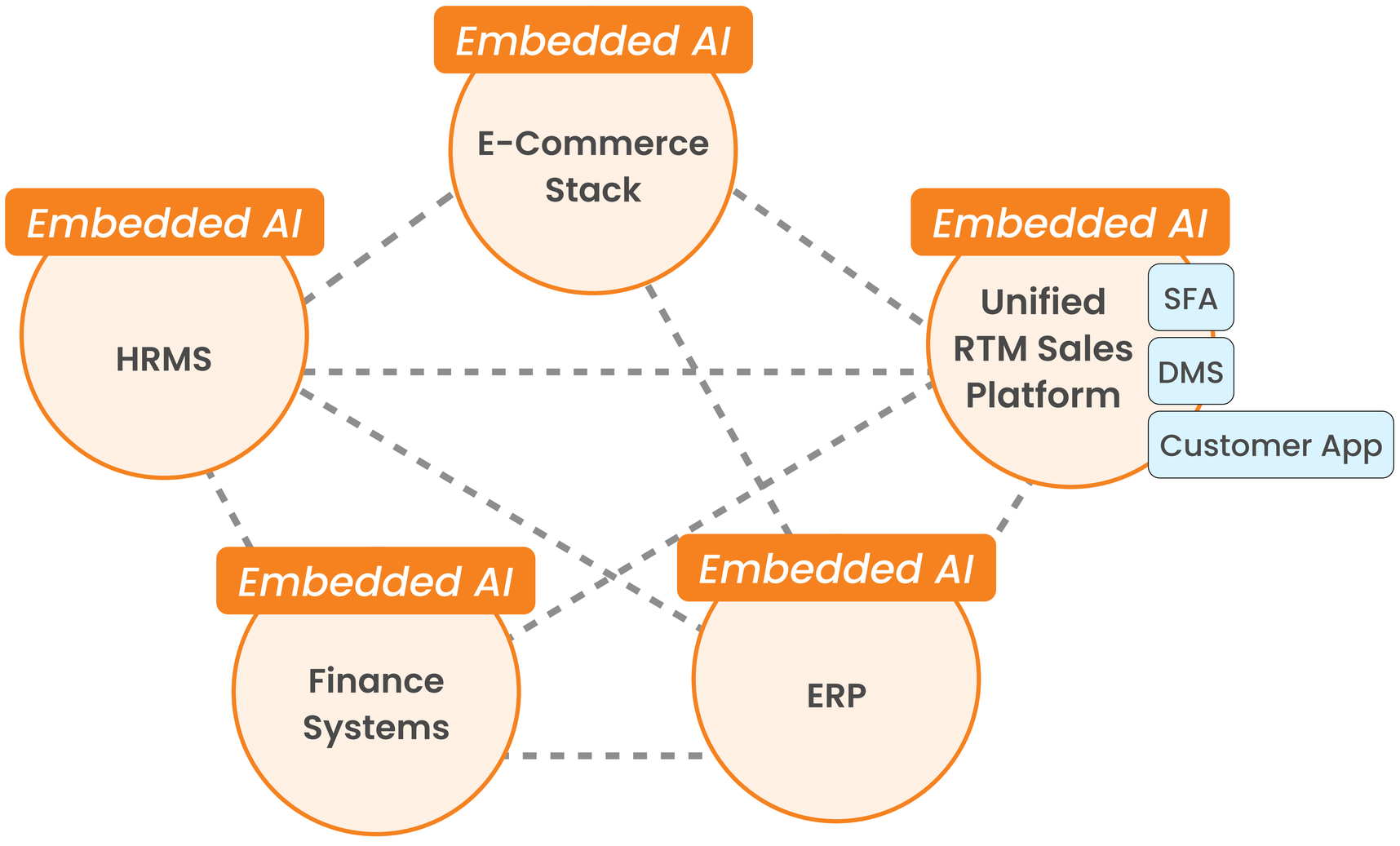
	Centralised AI	Embedded AI
Training Data Sources	Multiple systems: ERP, SFA, DMS, HRMS, E-Comm etc	Complete-in-itself platform running a function such as Sales, Service or Procurement
Deployment Time	12-24 months; complex integrations and data lake setup	Weeks to months: often pre-trained, ready-to-use, independent innovation cycles without burdening company resources
Use Case Examples	Enterprise-wide production forecasting, resource allocation planning	Order recommendation, procurement risk prediction, employee engagement
IT Complexity	Higher – requires data lakes, data pipelines, robust APIs, governance, and integration layers	Lower – minimal integration required; since it's built into the tools themselves
Scalability	Broad scope across multiple functions and geographies, but constrained by IT complexity	Narrower scope, but quicker scalability within workflows, targeted improvements; best for quick wins within a specific function
Investment Level	High initial costs with long-term strategic benefits	Lower cost with immediate business impact. Constant innovation by vendor to sustain long term ongoing benefits

02 AI Adoption Strategies

2.1 Strategies for Smaller & Mid-Sized Organisations

Expecting AI use cases from function wise SaaS applications.

No data lake to drive Corporate Centralised AI.



Such organizations often face challenges such as limited budgets, lack of team bandwidth and resources. They should aim to maximize impact with minimal overhead.

Challenge	Solution	Detailed Approach
Limited Budget	Adopt ready-to-deploy SaaS AI solutions	Leverage subscription-based, unified platforms that reduce capital expenditure
Data Fragmentation	Use integration-friendly tools	Standardize data inputs across systems without the need for a full-scale data lake
IT Resource Constraints	Prioritize embedded AI	Deploy pre-trained, plug-and-play solutions for immediate operational improvements
Tool Sprawl	Consolidate systems	Buy platforms that give you scalability to cover a function completely such as sales, procurement, HR. Avoid extreme consolidation on horizontal platforms to keep yourself de-risked from individual vendor.

Unsolved Problems - Not having a Data Lake where all business applications connect and opting for point to point integrations does leave vendor decoupling un-addressed. This is a known risk in favour of avoiding some infrastructure cost towards data lakes and data pipes.

02 AI Adoption Strategies

2.2 Strategies for Large & Mature Enterprises

Aadarsh Rohira | *Head, Digital* Hero

We expect respective SaaS vendors to be AI ready and bring in use cases that are specific to the function. At the same time, we connect all business apps to our Data Lake and we are building our AI uses cases that go across functions from there.

Centralized AI

- AI Agents cutting across functions
- Production forecasting
- Budget planning

Data Lake snowflake

Data Pipeline kafka CONFLUENT

Integration Middleware n8n DELL Boomi MuleSoft

Embedded AI	*Embedded AI*	*Embedded AI*	*Embedded AI*	*Embedded AI*
Unified RTM Sales Platform BeatRoute	E-Commerce Stack xeno	ERP ORACLE NetSuite	Finance Systems INTUIT quickbooks	HRMS workday
• Visit Planning AI	• Hyperpersonalization	• Predictive Maintenance	• Cash Flow Forecasting	• Personalized Learning Paths
• B2B Order Recommendation AI	• Fraud detection	• Inventory Optimization	• Credit Risk Assessment	• Predictive Attrition Analysis
• Conversational AI for Sales Teams and Channel Partners	• B2C Order Recommendation AI	• Procurement Automation	• AI-Based Auditing	• Workforce Optimization

For large enterprises, we advocate a hybrid AI strategy that uses SaaS Embedded AI to capture quick wins within individual functions, while building the foundation to support centralized intelligence.

Key Factor	Recommended Strategy	Detailed Approach	Expected Outcome
Data Management	Leverage existing IT infrastructure for embedded AI; integrate additional sources as needed	Begin with unified platforms that deliver embedded AI benefits; selectively add integrations for high-impact centralized analytics without mandating a full data lake	Rapid deployment with minimal disruption, scalable as use cases grow
Vendor Risk Management	Ensure easy coupling/ de-coupling of systems	One function = one comprehensive system, best system for that function, good embedded AI within that function. Different functions = different systems	Greater flexibility and reduced vendor lock-in
Scalability	Hybrid approach: embed AI for better scalability within functions, and layer in centralized AI for cross-function scalability	Deploy embedded AI quickly for quick wins on AI use cases and gradually build the insfrastructure for corporate level AI use cases	Immediate ROI with long term transition to constantly self-sustaining innovation cycles
Enterprise Architecture	Use integration-friendly unified platforms and enterprise SaaS solutions	Leverage current IT systems with modular, open architectures; avoid mandating a full-scale data lake unless justified by strong use cases	Agile, cost-effective infrastructure that supports future growth
Configurability	Prefer Industry specific solutions for ready-to-deploy applied AI, but look for high degree of enterprise grade configurability to not be constrained	Ensure AI tools offer easy turn on - turn off functionality, and can be adapted/retrained to meet your specific and changing requirements	Enhanced flexibility and alignment with operational requirements

A hybrid strategy enables mature enterprises to achieve quick wins with embedded AI while building a flexible, scalable foundation for centralized intelligence - minimizing disruptions and ensuring long-term strategic benefits.

02 AI Adoption Strategies

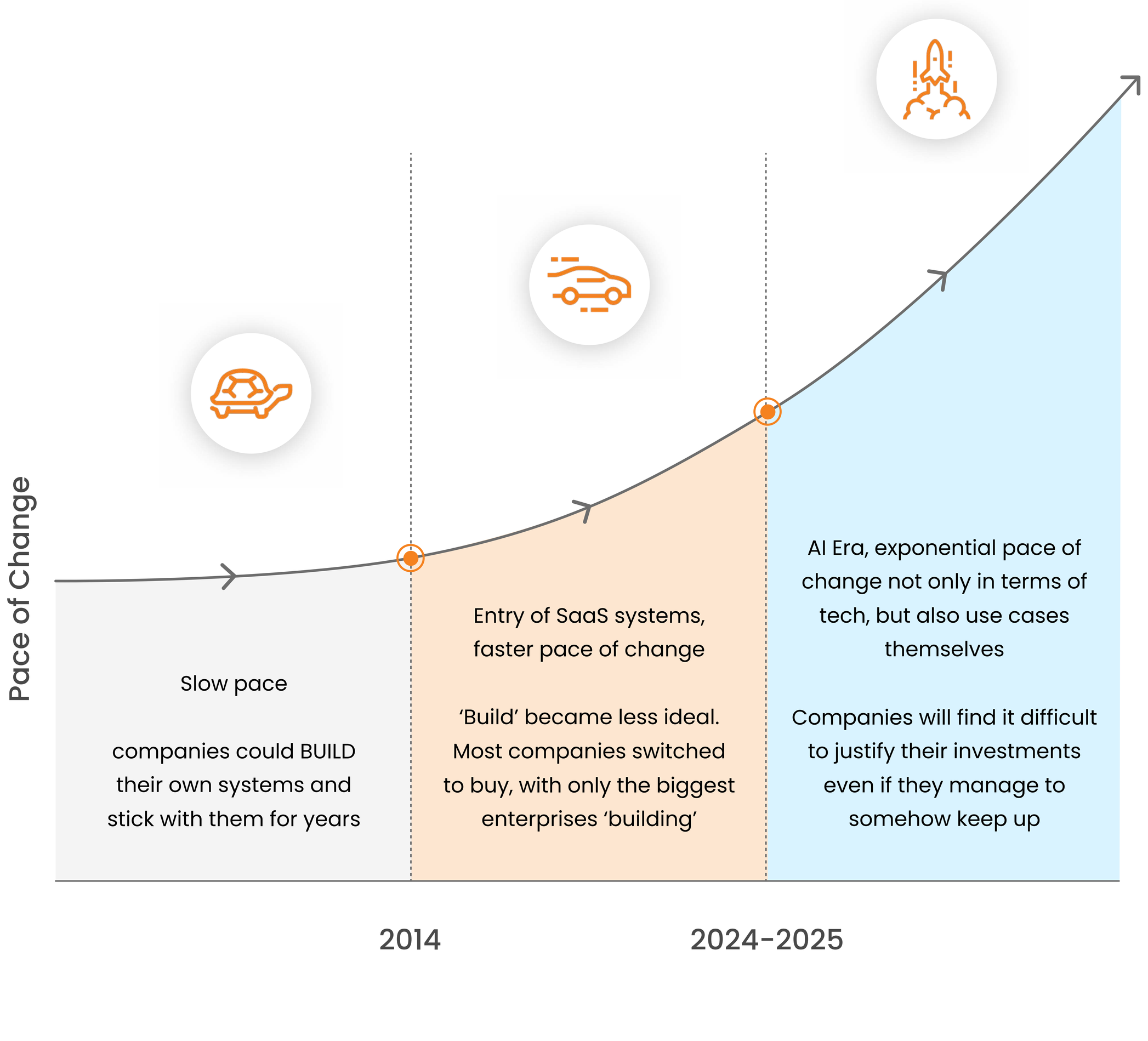
2.3 Build vs. Buy Decision

Nischai Nevrekar | *Chief, Digital Initiatives*

Pidilite

We have done a lot of development in past in-house. Now, this strategy has evolved into building only those use cases that are not available off the shelf in the market. Else, simply buying enterprise grade platforms with AI capabilities and integrate them with one another via a data orchestration layer ensures we are leveraging faster innovation cycles and keeping ourselves de-risked from any single vendor.

Deciding whether to build in-house or to buy ready-made solutions is even more critical in the AI era. As the expected pace of change from the technology platform is going to be significantly higher.

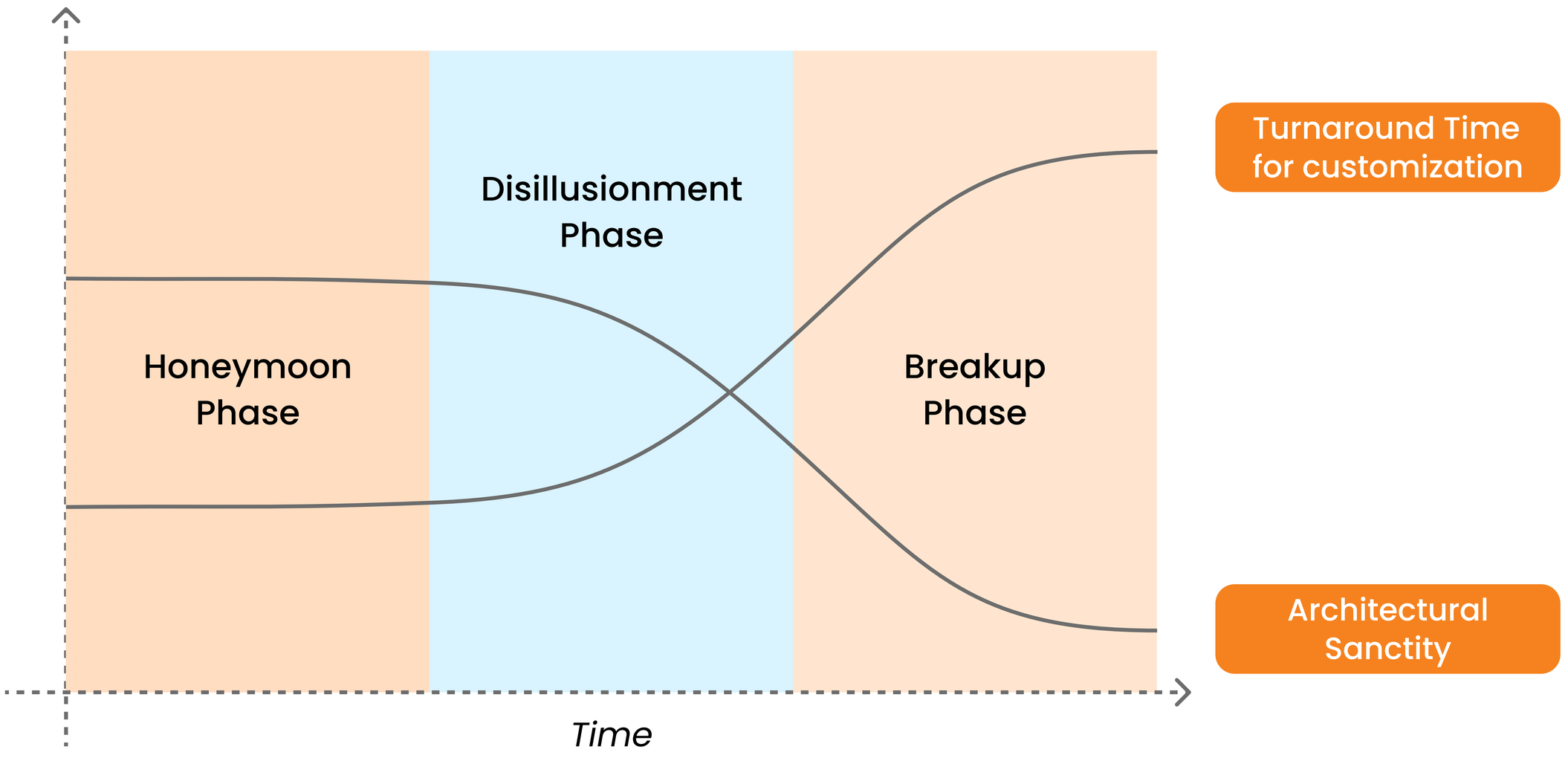


02 AI Adoption Strategies

2.3 Build vs. Buy Decision

Building in-house is often misunderstood as building fast. In the mid and long term, having the dev team in the next room fades away.

Three Phases of Building In-House



Metric	Build In-House AI	Buy SaaS Embedded AI
Development Cost	High: Requires a dedicated AI team and infrastructure	Lower: Subscription-based, with vendor support
Time to Deploy	12-24 months (with no guarantee that it will work as intended)	Weeks to months (easier to evaluate capability before buying)
Maintenance & Upgrades	Ongoing, resource-intensive	Vendor-managed, predictable upgrade cycles
ROI Realization	Slower; benefits uncertain and long-term	Faster; measurable impact with clear ROI metrics

03

Justifying the AI Investment:

ROI & Business Impact

Securing AI investments requires demonstrating clear, quantifiable benefits. Use the following framework to measure and justify the ROI of your AI initiatives.

AI ROI Calculation Framework

Cost Component	Investment Details	Potential ROI Impact
Infrastructure Setup	Cloud services, data lakes, AI platforms	Improved data readiness; scalability for enterprise-wide insights
Software Licensing	Subscription fees for AI tools	Increased revenue through optimized sales execution and pricing
Operational Costs	Training, vendor fees, support	Cost savings from process automation and reduced manual labor
Implementation Time	3-12 months	Faster time-to-market; accelerated competitive advantage

ROI Formula

$$\text{ROI} = \frac{(\text{Revenue Uplift} + \text{Cost Savings})}{\text{AI Investment}}$$

Example

Let’s say your current revenue is $1000, and route-to-market costs are $100. If AI deployment results in a 5% revenue uplift and a 10% reduction in operational costs, with a total AI investment of $10, then:

ROI = ($50 + $10) / $10 = 6X Return

04

Building an AI-Ready Team for Retail and Consumer Goods brands

Successful AI adoption depends not only on technology but also on the right human resources. Instead of investing in teams to develop AI use cases from scratch, focus on building a team that can manage AI strategy, vendor relations, and integration.

Essential Roles & Responsibilities

Role	Key Responsibilities	Focus Areas
AI Strategy	Develop AI roadmap; align AI initiatives with business goals	Strategy, ROI evaluation, long-term vision
AI Vendor Management	Evaluate, select, and manage AI vendors; ensure solution fit	Vendor selection, contract management, performance metrics
AI Data Analysis	Monitor and measure AI performance; validate outcomes	KPI tracking, data quality, continuous improvement
IT AI Integration	Ensure seamless integration of AI solutions with existing systems	Systems integration, IT governance, technical support

Best Practices

- Instead of hiring AI model developers, **focus on buying mature, pre-trained AI solutions.**
- **Build skills to evaluate vendors** who are ready for the AI transition.
- **Build capability and capacity to measure the impact of AI enablement.** Every business' management is going to ask for it.
- **AI security expertise can be built in-house, or outsourced.**

05 About BeatRoute & Our Approach to AI

BeatRoute is a goal-driven SaaS sales platform for retail brands. It is an enterprise-grade, scalable platform that uses a proprietary Goal-Driven AI framework to deliver measurable business impact (see the table at the end) for brands in their retail sales and distribution channels.

Worldwide, retail brands from industries such as FMCG, consumer goods, and building materials face the difficult choice of risky and high Capex implementation projects on development platforms. We are solving this global problem with our ready-to-deploy SaaS solution.

BeatRoute currently serves 200+ enterprise brands in 20+ countries, with 100K+ users across India, South Asia, and Africa in 10 industry verticals.

1. We offer ready to use, configurable, Goal-Driven AI, while supporting easy integrations with data lake and data pipelines so that you can run your own centralized intelligence.
2. The platform is highly configurable, allowing you to adapt our AI to your unique processes.
3. Our continuous improvement model ensures that AI performance grows as it learns from your data.

12.6%

Sales Uplift Through BeatRoute's Goal-Driven AI (GDAI) for Sales Team

Examples of Modules & Workflows Used

- KPI Scorecard for Sales Reps & Managers
- Operational AI (e.g., Order Recommendation AI, Help Me Plan, Task Recommendations, Customer Insights)
- Sales Team Gamification
- CuesBot Conversational AI

Parameters Measured

- Average Monthly Sales of same customers before and after GDST deployment
- No. of Lines Sold pre- and post-GDST
- Successful New Retailer Ratio in GDST enabled team v/s plain SFA features
- Percentage of New Entrants in the Gamification Leaderboard every month

5.2%

Sales Uplift Through BeatRoute's Goal-Driven AI (GDAI) for Customers

Examples of Modules & Workflows Used

- Milestone completion visibility, and nudges to customers
- Spin & Win engagement
- Multi-media Communication campaigns
- Operational AI with Order Recommendation and Incremental Order Nudges
- Rewards based Gamification

Parameters Measured

- No. of Lines Sold before and after GDST deployment
- Average Monthly Sales of same customers before and after GDST deployment
- Scheme Budget utilization
- No. & Value of Incremental Child Orders

4.3%

Sales Uplift Through Operational AI

Examples of Modules & Workflows Used

- Order Recommendation AI
- Help Me Plan
- Task Recommendations
- Customer Insights

Parameters Measured

- No. of Lines Sold before and after Operational AI deployment
- Average Monthly Sales of same customers pre and post Operational AI deployment
- Percentage and Number of Productive Visits
- Average Order Value

5.3%

Sales Uplift Through Conversational AI & Analytics

Examples of Modules & Workflows Used

- Conversational AI (CuesBot)
- Configurable Dashboards (Report Builder)
- Competitor Insights (Structured data collection)

Parameters Measured

- Actions Taken vs. Suggested by CuesBot
- Total Actions Taken by managers pre- and post- Conversational AI deployment
- Sales from the same set of customers measured before and after implementing Conversational AI and Analytics features

BeatRoute

Get Measurable Sales Uplift in Your Retail Sales and Distribution

beatroute.io