Accelerating Sales & Distribution Insights with Real-Time Data Integration for an Iconic CPG Brand

Accelerate Data & AI Activation

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Executive Summary

The leading manufacturer and distributor of one of the world's most popular CPG brands faced the challenge of navigating complex and fragmented data landscapes across systems like Databricks, Snowflake, Salesforce Consumer Goods Cloud, and other custom applications. These silos inhibited timely access to data, restricted operational efficiency, and limited the effectiveness of the field sales team.

AI Squared partnered with to solve this problem by delivering a real-time, reverse ETL solution that automated data integration and empowered business users with actionable insights inside their daily workflow—Salesforce. The result was a transformational shift in how the teams accessed, analyzed, and acted on their data.

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The Challenge: Fragmented Data and Manual Processes

The organization operated across multiple systems, each holding critical information related to sales and distribution. The core challenges included:
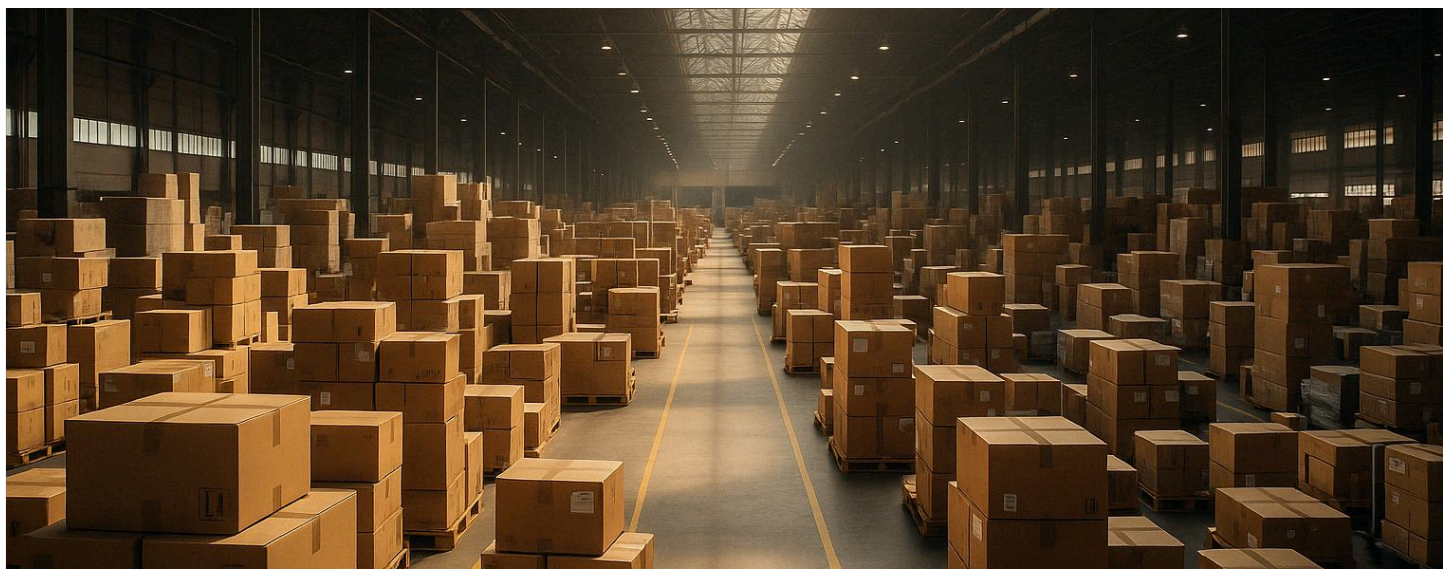
Data Silos

Disconnected systems (Databricks, Snowflake, Salesforce, and others) created fragmented data sets.
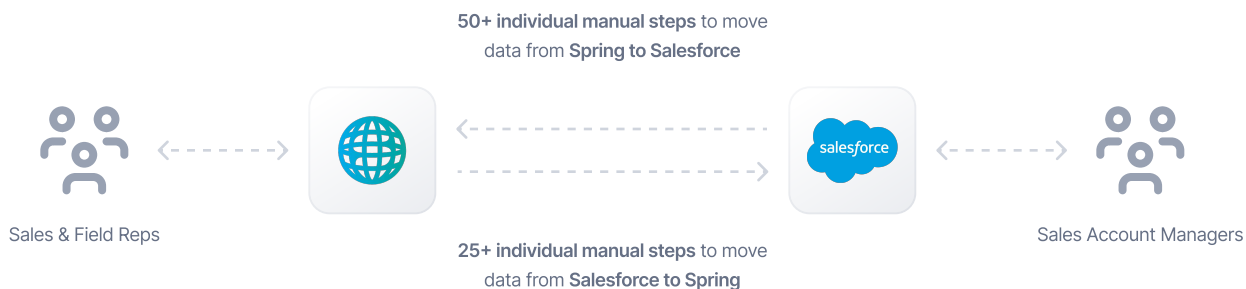
Manual Processes

Over five systems were manually synced in batch jobs, leading to delays and high error rates.

Limited Real-Time Insight

Field sales representatives lacked immediate access to current data for route planning, customer visits, and order placement.

Inefficient Decision-Making

Executive leadership faced barriers to timely and accurate insights due to outdated or inconsistent data.

50+ individual manual steps to move data from **Spring to Salesforce**

Sales & Field Reps

salesforce

Sales Account Managers

25+ individual manual steps to move data from **Salesforce to Spring**

ai squared

The Solution: Delivering AI-Powered Insights Within Salesforce

AI Squared implemented a powerful reverse ETL solution designed to deliver:

Automated, Real-Time Data Movement

Seamless data flows were established across Salesforce, Snowflake, and other key platforms, eliminating the need for manual mapping or syncing.

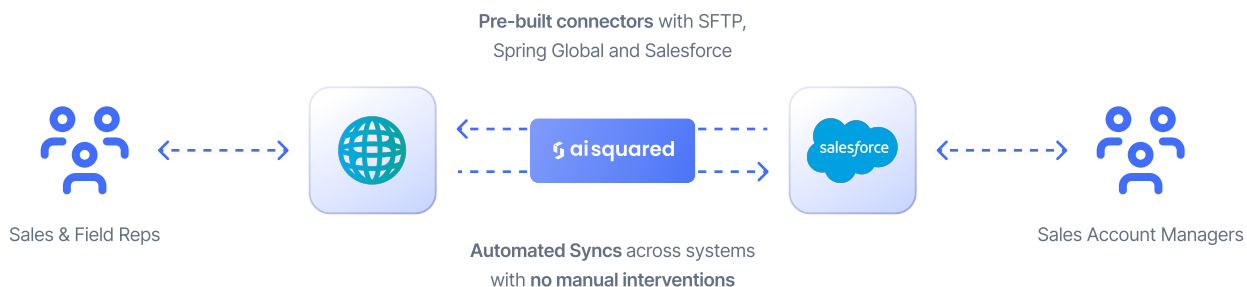**Salesforce-Native Data Delivery**

Data and AI insights, including opportunity scoring models, were integrated directly into Salesforce, the core workflow platform for field Sales Account Managers (SAMs).

AI Model Operationalization

AI models were embedded into operational workflows to enhance decision-making at the point of action.

Unified and Timely Insights

A near real-time pipeline ensured consistent, unified data delivery to both sales teams and executive stakeholders.

Pre-built connectors with SFTP, Spring Global and Salesforce

Sales & Field Reps → 🌐 → ai squared → salesforce → Sales Account Managers

Automated Syncs across systems with **no manual interventions**

Business Impact

The collaboration yielded measurable improvements across several business metrics:

- **Dramatic Productivity Increase**: Tasks that previously required 40 hours were completed in under 1 hour, with zero errors.

- **Streamlined Sales Operations**: 200+ field sales and account reps can now access and optimize their schedules on demand.

- **Improved Decision Accuracy**: Unified data enabled more informed, faster decisions at both the field and executive levels.

> "AI Squared enables us to bring critical insights to our sales team directly. The solution has given us the speed and credibility we need to drive data & AI transformation across our organization." — Says the CIO.

Looking Ahead: 2025 and Beyond

The company's roadmap for 2025 includes expanding the current solution's capabilities to:

- Sync additional data insights (Orders, Notes) into Salesforce.
- Deliver external data and AI insights to the right Salesforce objects at the right time.
- Implement Next Best Actions for Salesforce users.
- Launch controlled Agentic AI initiatives across the organization.

With AI Squared's platform as the foundation, the organization continues to push toward a fully integrated, insight-driven enterprise.

Conclusion

The partnership with AI Squared demonstrates the power of modern data infrastructure and AI integration. By eliminating manual processes and democratizing access to insights, the organization a has taken a decisive step toward becoming a data-first organization—poised for scalable innovation and operational excellence.

Bring AI To Where Work Happens

Our partners and customers