ai squared

WHITE PAPER

Accelerating Sales & Distribution Insights

with Real-Time Data Integration

Executive Summary

A regional beverage distributor operating more than 500 delivery routes faced a straightforward problem. Critical operational data existed across multiple platforms including Databricks, Snowflake, Salesforce Consumer Goods Cloud, and a collection of internal applications. That siloed data approach and a reliance on human know-how impacted business decisions and the bottom line.

AISquared addressed this by implementing its AI-native data platform architecture that combined and activated data for use by AI-generated intelligence and pushed all results directly inside Salesforce and the applications operational and sales teams, including drivers used every day. Because the platform operated as a unified system across the entire fleet, drivers received dynamic rerouting recommendations in real time, accounting for traffic, weather, and road incidents. The system monitored loading dock conditions at delivery sites and could detect backlog queues before a driver arrived, redistributing affected stops to drivers with available capacity on adjacent routes. The result was immediate and measurable.

Tasks that previously required 40 hours of manual effort were completed in under one hour with zero errors, a 97.5% productivity improvement. Operational overhead declined by an estimated 30% and the organization experienced a $3 million in overall cost savings and $2.5 million in additional revenue uplift. Beyond the numbers, this deployment demonstrates a repeatable model for how distribution-intensive enterprises can close the gap between data infrastructure investment and real-world operational performance.

97.5%	30%	$3M	$2.5M
Productivity Improvement	Cost Reduction	Cost Savings	Revenue Uplift

The Business Challenge

Like many large distribution organizations, the company operated within a complex technology landscape built over time to support different functional needs. While each platform served an important purpose, the combined environment created friction across day-to-day operations. Several issues limited performance:

Fragmented Data Across Core Systems

Critical information was distributed across Salesforce, Databricks, Snowflake, and other internal applications. This fragmentation made it difficult to create a single, trusted operational view. No single view of operations existed. Field teams and managers were often working from different versions of the same operational realities.

Manual and Delayed Processes

More than five systems required manual synchronization through batch-oriented workflows. These processes consumed time, introduced avoidable risk, and delayed access to business-critical information.

Limited Visibility for Field Teams

Drivers who also functioned as delivery operators and sales account managers did not always have current insight available at the moment decisions needed to be made, whether for route planning, account visits, order placement, or prioritization. The insights existed somewhere in the organization, but they weren't available at the point of action.

Slower Operational Decision-Making

Leadership teams were often forced to make decisions using data that was delayed, incomplete, or inconsistent across systems, reducing speed and confidence.

Cost Leakage Across Distribution Operations

When route intelligence, account data, and execution insights are not surfaced directly in frontline workflows, organizations experience avoidable inefficiencies in fuel use, labor allocation, vehicle utilization, and sales execution.

The AISquared Solution

AISquared addressed these challenges by operationalizing data and AI directly inside existing business workflows via its Data Platform "UNIFI".

1 Real-Time Reverse ETL

AISquared established near real-time data flows across Salesforce, Snowflake, Databricks, and other systems, reducing the need for manual data mapping, disconnected reporting, and lagging batch updates.

2 Workflow-Native Delivery

Rather than asking users to change behavior or adopt a new interface, AISquared delivered data and AI-driven recommendations directly inside the applications drivers and sales teams used daily. Drivers received dynamic rerouting guidance in real time, triggered automatically by traffic conditions, weather events, and road incidents, without needing to consult a dispatcher or manually search for alternatives. Because the system maintained a unified operational view across the entire fleet, it could detect loading dock congestion at a delivery site, assess queue depth, and redistribute affected stops to drivers with available capacity on adjacent routes. One driver's delay became a solvable problem for the network, not an isolated disruption absorbed through overtime or missed deliveries.

The AISquared Solution

3 Fine-Tuned Large Language Models and Custom Machine Learning

AISquared deployed fine-tuned large language models and custom-built machine learning models designed to align with the distributor's existing business operations and real-world workflow requirements. These models were tailored to the company's operating environment, data structures, and decision patterns. In practice, that meant models that optimize route sequencing based on delivery time windows, site access constraints, and real-time traffic data; models that assess loading dock queue conditions at delivery sites and flag backlog risk before a driver arrives; and models that continuously evaluate cross-fleet capacity, identifying which drivers can absorb redistributed stops without exceeding their window or mileage parameters. The result was a shift from static route plans managed by dispatchers to a dynamically optimized fleet that adjusted in real time to actual operating conditions.

4 Embedded AI for Point-of-Action Decisions

AI-generated insights, including account prioritization and opportunity scoring, were surfaced in operational context so users could take immediate action without leaving their workflow.

5 Unified Operational Visibility

A more consistent and timely data pipeline created a shared view for field teams, managers, and executive stakeholders, improving alignment and reducing decision latency.

6 Scalable Foundation for Future Automation

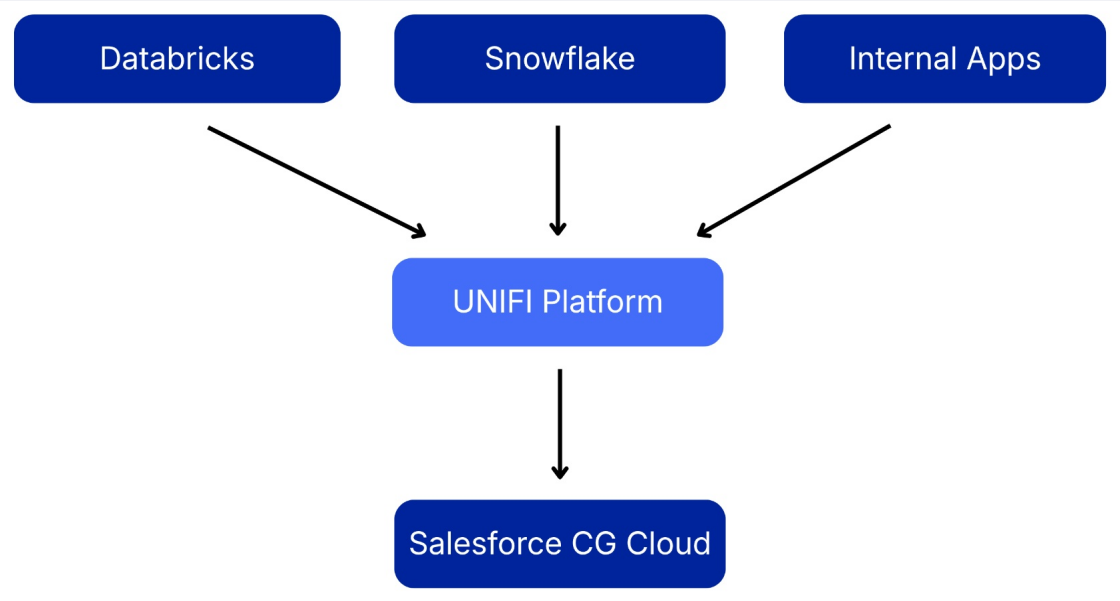
The implementation created a foundation for broader capabilities, including next-best-action guidance, expanded object synchronization, and future agentic AI initiatives governed within a controlled enterprise framework.

Solution Architecture

The solution was designed around a simple principle: move trusted data and intelligence to the system where work gets done. AISquared connected upstream data sources and business systems, synchronized relevant information into Salesforce in near real time, and embedded AI-driven insights directly into the field sales workflow. This architecture enabled the company to reduce manual effort, improve responsiveness, and create a more seamless connection between data infrastructure and operational execution.

Key capabilities included:

- Near real-time synchronization across core platforms
- Direct delivery of business and AI insights into Salesforce
- Reduction of manual reconciliation and mapping processes
- Improved consistency of operational data across users and teams
- Support for future expansion into recommendations and intelligent automation



Business Impact

The engagement delivered immediate operational improvements while also creating the basis for broader enterprise value realization.

97.5% **Productivity Increase**

Tasks that previously required 40 hours were completed in under one hour with zero errors.

30% **Reduction in Operational Costs**

Improved route planning, streamlined data movement, dynamic stop redistribution, and more efficient field execution contributed to a meaningful reduction in operating overhead.

$1.6M **Fuel Savings**

Dynamic rerouting around traffic and road incidents, elimination of unnecessary miles from static route plans, and reduced idle time at loading docks drove material fuel savings at scale. Across 500+ routes, even marginal reductions in miles-per-route compound into significant savings.

+$1M **Reduction in Overtime Expense**

By reducing manual planning workflows, improving schedule accuracy through real-time stop redistribution, and eliminating the unplanned overtime that accumulates when drivers absorb delays without operational support, the organization lowered overtime exposure across distribution operations.

+$300K **Reduction in Vehicle Wear and Tear**

More efficient routing, reduced backtracking, and fewer hours spent idling in dock queues lowered maintenance burden by decreasing excess mileage and avoidable fleet strain.

+$2.5M **Incremental Sales**

When customer, account, and opportunity data are delivered directly into the flow of work, sales teams are better positioned to prioritize the right accounts, improve execution quality, and capture incremental revenue.

Improved Decision Quality

By giving drivers, field teams, and leadership access to more timely and trusted data, the company improved the speed and quality of decisions at every level of the organization.

Streamlined Operations

Automation reduced administrative friction and allowed more time to be directed toward customer-facing and revenue-generating activity.

Strategic Value

The significance of this initiative extends beyond process improvement. This deployment demonstrates how modern enterprises can bridge the gap between data infrastructure and real-world execution. Too often, organizations invest heavily in cloud data platforms and AI models but fail to operationalize those investments inside day-to-day workflows. AISquared addresses that final mile by embedding intelligence directly into the applications employees already use.

For distribution-intensive organizations, this matters because small improvements in route efficiency, labor utilization, asset use, and field execution compound rapidly across the business. By integrating real-time data and AI into the frontline workflow, companies can improve both efficiency and revenue performance without requiring a wholesale change in user behavior.

Roadmap and Future Opportunities

With the core data activation foundation in place, the organization is positioned to expand into additional high-value use cases, including:

- Synchronization of additional data types, including orders and notes, into Salesforce
- Delivery of external data and AI insights to the right Salesforce objects at the right time
- Introduction of next-best-action recommendations for field users
- Controlled rollout of agentic AI initiatives across the enterprise
- Expansion of workflow intelligence into adjacent operational and distribution processes

Conclusion

This engagement illustrates the value of operationalizing enterprise data and AI at the point of action. By eliminating manual processes, connecting fragmented systems, and embedding insight directly into Salesforce, the company improved productivity, increased operational visibility, and created a stronger foundation for future optimization.

The result is more than a technology integration. It is a more responsive operating model, one that enables faster execution, lower friction, and measurable business value across sales and distribution operations.

With AISquared, the organization took a meaningful step toward turning enterprise data into operational advantage.