



TRANSFORMING FIELD TRIAL MANAGEMENT FOR A GLOBAL CPG LEADER

Replacing manual, fragmented processes with an AI-enabled solution that streamlined operations and supported 4,500+ field consultants in just 14 weeks.

ABOUT THE CLIENT

The client is a global leader in consumer-packaged goods, running product field trials across multiple geographies, agencies, and sites. Over 4,500 trial consultants conduct on-ground product trials daily on behalf of the organization. The client's operations span web, mobile, IVR, SMS, and digital microsites, serving a user base that includes super admins, regional managers, team leaders, field consultants, and consumers.

CLIENT REQUIREMENTS

As field trial volumes grew, the client's entirely manual & fragmented trial management process became a bottleneck. There was no unified system associating planning, execution, compliance and financial reconciliation. The client required a production-ready digital system built with speed, and they wanted it without compromising on security or compliance.

THE SPECIFIC CHALLENGES INCLUDED:

NO UNIFIED VISIBILITY ACROSS GEOGRAPHIES.

Managers had no way to see project status, task progress, or consultant activity across regions in real time.

FIELD CONSULTANTS LACKED DIGITAL TOOLS.

Trial consultants had no app or system to plan, execute, or report trial activities. In areas with poor network coverage, data capture was either delayed or lost entirely.

SLOW CONSUMER FEEDBACK LOOPS.

Feedback from trial participants came back through fragmented channels, often too late to influence business decisions. There was no standardized digital path for consumer registration or incentive delivery.

MANUAL FINANCIAL RECONCILIATION.

Agency payments, deductions and monthly invoicing were managed manually, making delays, errors and audit exposure.

NO AUDIT TRAIL OR COMPLIANCE FRAMEWORK.

Without automated validation of field activity, there was limited ability to verify trial execution, detect anomalies, or ensure accountability at scale.

The platform demands to assist a large, role-diverse user base and work across web, mobile (including offline), IVR, SMS, QR-code microsites and WhatsApp.

HAPPIEST MINDS SOLUTION

Happiest Minds put forward and carry out a GenAI-first delivery approach, embedding AI into every stage of the development lifecycle. The team applied the Rel(AI) Build Agentic Framework to drive core application code, test cases, infrastructure scripts and deployment configurations directly from business requirements.

Delivery began with a UX-first design stage that plan every user persona prior a line of code was written. From there, the team developed the web portal, mobile app, backend APIs and multi-channel integrations in parallel, kept in sync by the AI-assisted development framework.

FULLY INTEGRATED TRIAL MANAGEMENT PLATFORM

The delivered solution covered the complete trial lifecycle:



Web Administration Portal.

A centralized portal grant managers a unified view across all geographies, sites, and agencies for planning, tracking, reporting & financial management. Role-appropriate approach for super admins, team leads and auditors.

Offline-First Mobile Application.

A mobile app for field consultants with device binding and trial recording. Field teams capture data without network connectivity and sync automatically when reconnected.

Multi-Channel Consumer Engagement.

Consumer touchpoints across IVR callbacks, SMS flows, QR-code-based microsites, & WhatsApp. Consumers register for trials, select products, & receive confirmation messages & incentives through their preferred channel.

ML-Powered Audit & Compliance Module.

Machine learning validates trial activity, verifies field-captured images, & flags anomalies, reducing fraud risk.

Automated Budgeting & Invoicing.

Financial reconciliation automated end-to-end, covering agency payments, deductions, & monthly invoice generation.

DEVELOPMENT APPROACH: REL(AI) BUILD

The Rel(AI) Build Agentic Framework has two primary functions:

Generating code (creating modular application code, test cases, and deploy configurations based on business specifications and design blueprints)

Refining code (continuously validating, improving, and completing generated code so it meets or exceeds enterprise grade standards).

This ability allows the team to execute simultaneously across all workstreams, rather than executing one at a time, which resulted in reducing the estimated project timeline of 7 months to 14 weeks.

Cloud & Infrastructure: Microsoft Azure (hosting, high availability, data security, compliance)

VALUE DELIVERED

14 weeks to production

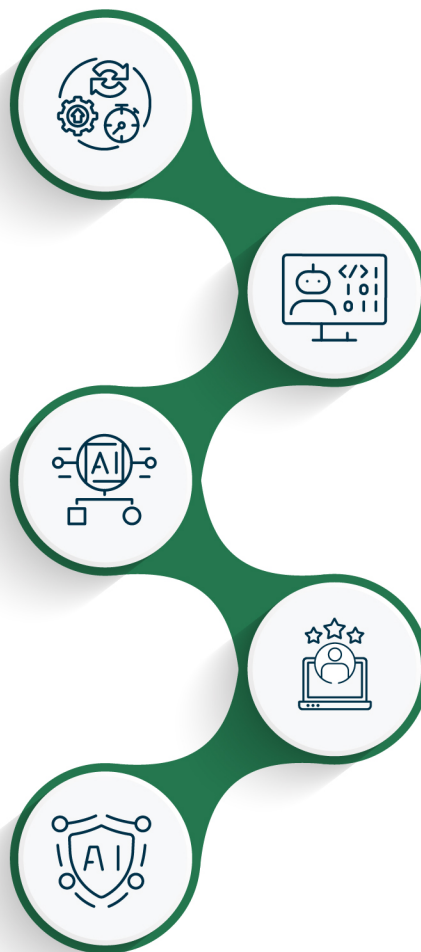
A project of this scale would normally take seven months to produce. We delivered it in 14 weeks—a 52% time-to-delivery reduction, possible because of the AI-first development approach.

4,500+ consultants tracked

Managers now have real time visibility into field activity, trial progress & compliance status in real time across every business unit and geography. This was previously impossible.

Built-in compliance

The platform incorporated role-based access controls, audit-ready features, & ML-powered anomaly detection from the beginning, assuring that every piece of consumer data was managed to the utmost level of integrity.



35% less effort put into development

The AI enabled code generation and refinement spared time for the team to focus on quality, integration, & innovation instead of time-consuming manual tasks.

Digital consumer feedback

Consumer feedback is tracked digitally across many channels at the trial stage, replacing the slow and fragmented collection process.

For more information, write to us at business@happiestminds.com



www.happiestminds.com

About Happiest Minds

Happiest Minds Technologies Limited (BSE, NSE: HAPPSTMNDS) is an AI First, customer-centric digital engineering company committed to delivering 'Happiest People . Happiest Customers'. With an integrated approach that spans from chip to cloud, Happiest Minds delivers secure and scalable solutions across product engineering, cybersecurity, analytics , and automation platforms. Happiest Minds brings purpose and precision to every engagement, helping enterprises solve complex business challenges and fast-track their digital evolution across industry sectors such as Banking, Financial Services & Insurance (BFSI), EdTech, Healthcare & Life Sciences, Hi-Tech and Media & Entertainment, Industrial, Manufacturing, Energy & Utilities, and Retail, CPG & Logistics.

Happiest Minds has been honored by both the Golden Peacock Awards and the Institute of Company Secretaries of India (ICSI) for its exemplary Corporate Governance practices. Guided by its mission of 'Happiest People . Happiest Customers' and consistently recognized as a great place to work, Happiest Minds is headquartered in Bengaluru, India, with a global presence across the Americas, UK, Europe, Australia, the Middle East, Africa, and Asia.