

Case Study

GenAI-Driven Automation of Rebate Contracts Increasing Revenue Optimization by 40%

Testimonial

*“KPI Partners helped us address a growing risk in how rebate contracts were being processed. By automating contract interpretation using GenAI, we significantly improved accuracy and gained much better visibility into rebate performance. **This directly strengthened our ability to identify, track, and optimize rebate revenue**, while establishing a scalable operating model aligned to our realities.”*

— Director, Finance Systems

Leading North American Foodservice Provider

Client

A leading North American foodservice design, equipment, and supplies provider managing a large supplier ecosystem and high-volume vendor rebate programs. Rebate revenue is a critical contributor to profitability, making accurate contract interpretation and timely visibility essential for finance and operations.

Overview

As the business scaled, vendor rebate contracts grew in both volume and complexity. A manual, spreadsheet-driven process that once sufficed began introducing risk—not just operationally, but financially. Inconsistent interpretation of contract terms and delayed visibility limited the client’s ability to fully realize rebate revenue tied to sales performance.

The client needed to scale rebate contract processing without expanding manual effort, while improving accuracy, visibility, and confidence in rebate revenue realization. KPI Partners was engaged to address this risk using a GenAI-led approach.

Challenges

- **600+ rebate contracts annually**, each with unique and complex terms
- **Highly variable contract language**, increasing interpretation risk
- **Spreadsheet-based workflows**, delaying rebate tracking and reconciliation
- **Inconsistent interpretation**, leading to potential under-claimed rebates
- **Limited, delayed visibility**, constraining proactive rebate revenue management

As volumes increased, the existing operating model amplified both operational effort and risk to rebate revenue.

Our Approach

KPI Partners focused on building a **revenue-aware, scalable operating model**, not just automating a task.

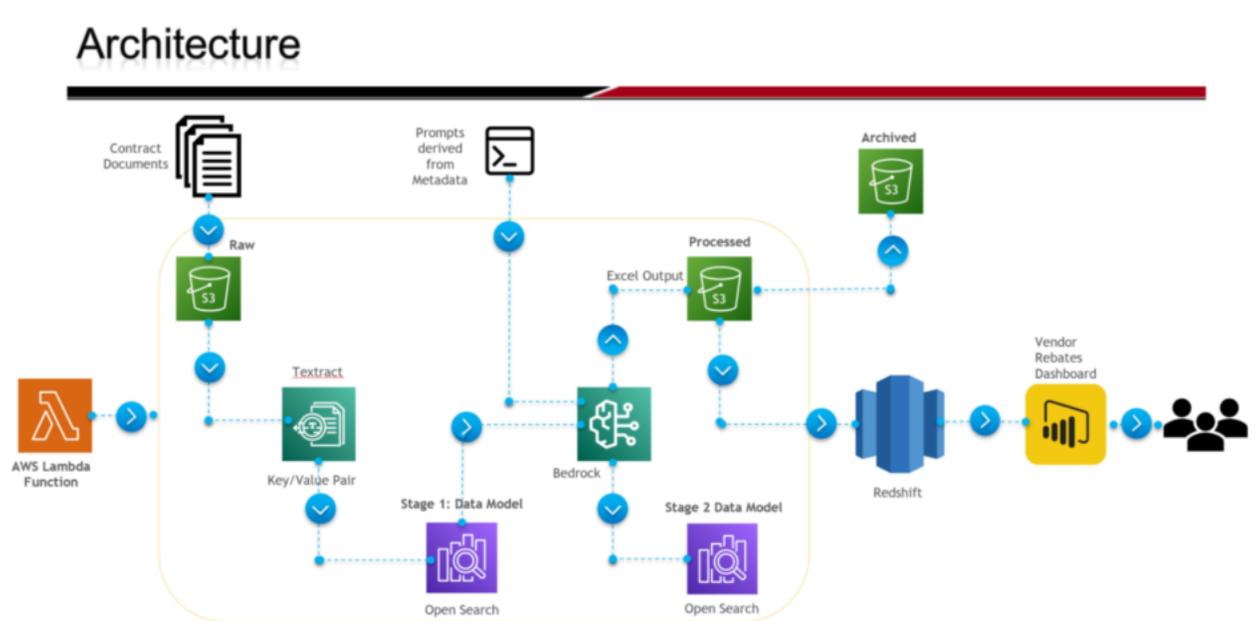
- **GenAI-driven contract understanding** using ContractGPT
- **Metadata-based normalization** to consistently interpret rebate terms
- **Automation-first design** to eliminate manual handling
- **Governed data capture** to support auditability and trust
- **Analytics-ready outputs** to enable proactive rebate tracking

Solution Overview

The solution automated the full rebate contract lifecycle, transforming unstructured contracts into reliable, revenue-ready data.

- Automated ingestion of rebate contracts from PDFs and scanned documents
- Intelligent extraction and standardization of rebate terms using ContractGPT
- Direct capture of structured data into the database
- Secure archival of original contracts and processed outputs

- Real-time delivery of rebate data to reporting tools



Key Technologies

- **ContractGPT** – GenAI accelerator for contract interpretation
- **Customized GenAI Contract Intelligence** – Metadata-driven normalization
- **Database Integration** – Structured, audit-ready data capture
- **Power BI** – Real-time rebate reporting and visibility

Business Impact

Revenue Optimization Enablement

Improved accuracy and real-time visibility strengthened the ability to identify, track, and realize rebate revenue tied to contract performance.

100% Automated Processing

Manual rebate contract processing fully eliminated.

Zero Manual Data Entry

Spreadsheet-based workflows removed entirely.

40% Fewer Errors

Improved confidence in rebate calculations and downstream reporting.

Real-Time Visibility

Finance and operations gained timely insight into rebate performance.

Contract-to-Dashboard Automation

Seamless flow from contract ingestion to analytics.

Why This Worked

Revenue-aware design

Contract automation was built to support rebate realization, not just process efficiency.

GenAI over rules

Metadata-driven intelligence handled contract variability without brittle logic.

Automation by design

Manual steps were removed entirely, enabling scale without added risk.

About KPI Partners

KPI Partners is a global analytics and digital transformation firm delivering solutions across Data Science, GenAI, AI/ML, Data Engineering, Analytics & Visualization, Cloud Data Platforms, and DevOps/DevSecOps/MLOps. Founded in 2006 and headquartered in Newark, California, KPI Partners has delivered over 1,000 engagements for 300+ clients across multiple industries.

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