

MANAGED AI

From AI curiosity to a governed portfolio of practical use cases.

A national multi-store retail operator wanted to understand what AI could do for marketing, finance, training and store operations.

MANAGED AI PROGRAMME / MULTI-STORE RETAIL OPERATIONS / HEAD OFFICE, STORES, FINANCE, MARKETING

AT A GLANCE

1

Managed AI operating model spanning marketing, finance, training and operations

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Focus areas activated: marketing, finance, training and store operations

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Modernisation workstreams progressed: finance app, Academy and Marketing Hub

A national multi-store retail operator wanted to understand what AI could do for marketing, finance, training and store operations. Numata converted early interest into a managed programme that combined secure AI enablement, hands-on workshops, custom agents and targeted workflow development.

THE CHALLENGE

AI-adjacent opportunities were emerging in parallel across marketing content, store operations, finance reporting, training and internal knowledge. The risk was that AI would stay a collection of isolated demos rather than becoming a managed capability with clear ownership, workshops, governance, solution delivery and measurable adoption. The engagement had to turn enthusiasm into structured execution.

OUR APPROACH

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| 01 | Framed the programme around Apps, Agents and Workflows rather than one-off prompts or chat demos. |
| 02 | Ran practical enablement workshops covering Chat, Tools, Integrations and Agent creation for real day-to-day tasks. |
| 03 | Built targeted agents around live operational questions: marketing, finance analysis, training content and location intelligence. |
| 04 | Surfaced platform, access, payments and messaging dependencies early so build work did not stall on hidden blockers. |

WHAT WE DELIVERED

- Managed AI service wrapping advisory, enablement, agent build, workflow design and progress reporting.
- Custom agents including weather-responsive marketing, finance reporting, training content and a location-scout agent covering demographics, viability, competitor risk and preferred store zones.
- Chat, Tools and Integration training plus Agent training delivered, with Apps and Workflows workshops proposed as the next step.
- Application modernisation momentum: Finance app rebuild, internal Academy and Marketing Hub progressed with Entra ID authentication, SharePoint Online storage and Teams notification patterns.
- Risk and dependency register covering build-platform credits, app access, local payments alternatives and WhatsApp/Twilio onboarding.

“The shift was not from manual work to magic. It was from disconnected experimentation to governed, practical AI use cases shaped around real operational work.”

PROGRAMME LEAD, MULTI-STORE RETAIL OPERATOR

WHAT WE TOOK FROM IT

- 01 AI adoption is a workflow problem, not a prompt problem. Value shows up when agents sit next to real operational work.
- 02 Enablement has to reach beyond the enthusiasts. Training tasks anchored in day-to-day work move a wider group into everyday use.
- 03 Dependencies decide the timeline. Build credits, app access, local payment providers and messaging onboarding must be resolved up front.

ABOUT NUMATA

Numata is a business technology services and solutions provider for small and mid-sized enterprises. We align technology to business outcomes across IT strategy, cyber, data, operations, modern work and AI, delivered through NumataOne™, our strategy enablement framework.

Speak to the team: numata.co/contact