



How AI Can Reshape Distributed Sales Channels in Emerging Markets

APRIL 2026



Amplifying sales growth in emerging markets has historically meant expanding a company's geographic reach. Yet more and more brands and SKUs are competing for limited shelf space today, e-commerce has entered the fray, and, for many brands, the reach of distributed channel models in emerging markets is plateauing.

Meanwhile, the availability and quality of talent are under significant pressure. As a result, sales organizations must extract greater value from existing customers through improved effectiveness and efficiency while mandating continued improvement in frontline and mid-management capabilities.

Many businesses have already responded by building strong digital and data foundations, with good results. But as AI capabilities become increasingly advanced and accessible, the upside potential of deploying AI in these complex, distributed channel models is immense. In fact, it's already allowing first-movers to leapfrog the competition, driving potential sales increases of 15% to 20%.

Five emerging markets trends are fueling the need for AI adoption in sales



Increasing competitive intensity

More brands and SKUs are competing for limited shelf space

Winning with retailers requires sharper execution and superior in-store performance



Limited headroom for reach expansion

Distribution reach is plateauing across many markets

Greater sales are required from the same footprint to drive growth



Emergence of new retail formats

The retail landscape is fragmenting, with new formats emerging

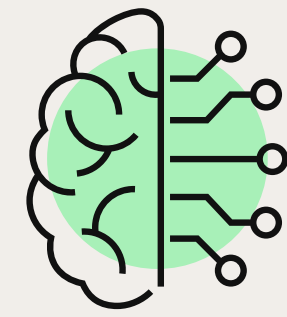
There is a need for more customized assortments and personalization at scale



Talent challenges at front end and in mid-management

Talent availability and quality are under pressure at scale

Continued capability enhancement of frontline and mid-level leaders is required



Rapid AI advancement

AI capabilities are advancing rapidly and becoming more accessible

There is potential to leverage AI's wide-ranging capabilities at low cost

A Transformational Change

Let's imagine the life of a salesperson tasked with visiting 20 to 25 different small stores each day on behalf of a large consumer packaged goods (CPG) company. Traditionally, they would manually determine which outlets to prioritize, the sequence of visits, and the assortment to promote. While they've probably had access to digital tools and basic analytics, they have likely faced challenges in leveraging them due to a lack of the necessary skills and the quality of the tools' recommendations—given that the latter are based on relatively limited, static datasets.

Now let's reimagine their day with an AI-powered sales companion accessible on a smartphone. The companion uses text and voice interfaces in the local vernacular to provide dynamic route planning. It offers real-time synthesis and analysis of conversations with retailers, creating highly customized recommendations for each store. It even provides performance management and training. The companion does this by leveraging both structured data, such as billing and loyalty data, and unstructured data, such as store images and planograms, handwritten notes, and sales conversations.

At the same time, GenAI-enabled virtual assistants can manage routine back-end activities, and a 24/7 digital agent can serve as the first point of contact for retailers—resolving queries, capturing orders, and issuing proactive payment reminders. This redistribution of tasks allows the salesperson to concentrate on engagement with higher-value channel partners.

The salesperson's effectiveness and efficiency can climb dramatically as a result. For example, one mid-size homecare brand in an emerging market realized an increase in sales of 11% within a month by deploying an AI companion that makes order recommendations and sends recovery reminders for lost sales. And a multinational CPG player experienced a 25% increase in customer-facing time and 8% higher product lines sold per sales call after deploying a companion with dynamic route optimization and the ability to nudge its salespeople with personalized incentives and reminders.

Distributed sales have evolved through multiple levels of maturity, and AI is the next frontier

GTM 1.0

GTM 2.0

GTM 3.0

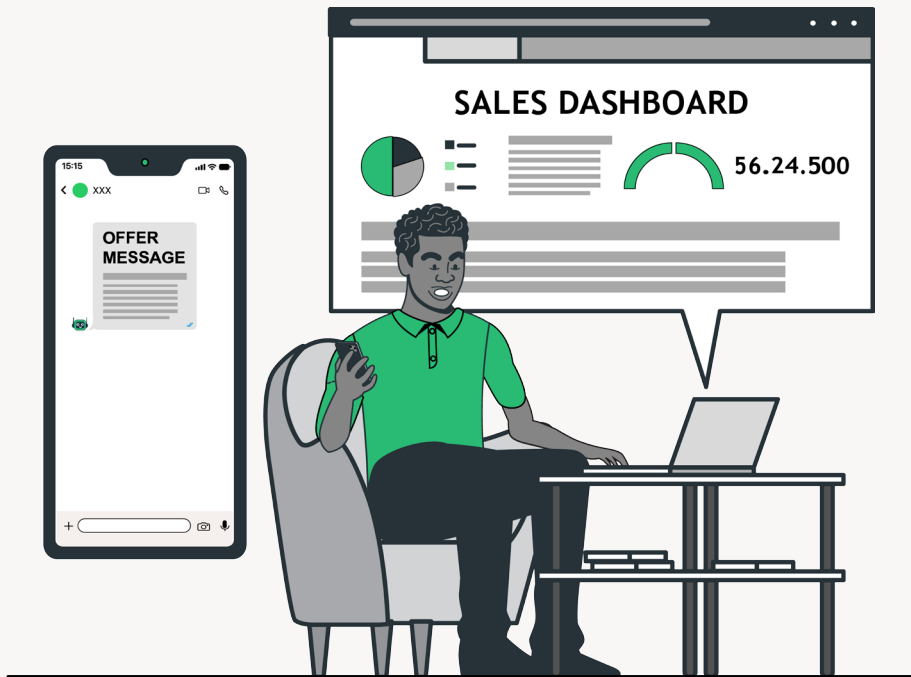
GTM 4.0



Manual sales planning and execution



Basic adoption of digital systems, with inconsistent execution



Large-scale deployment of digital apps and analytics

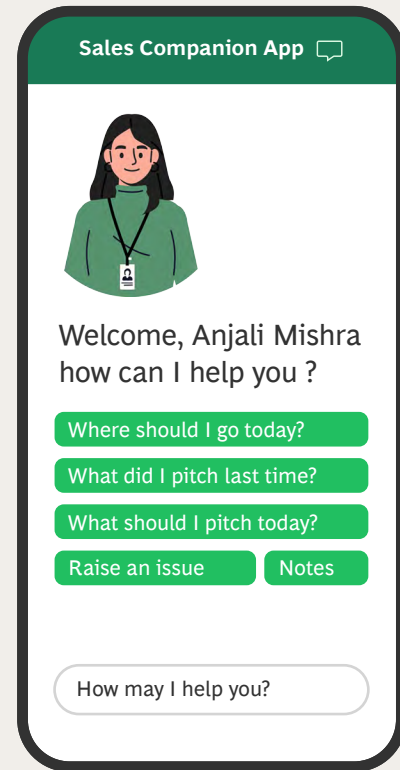


Images generated by AI

AI-enabled frontline, leadership, and back-end sales operations to increase effectiveness and efficiency

Source: BCG analysis.
Note: GTM = go-to-market.

Reimagine the life of a salesperson with an AI-led sales companion



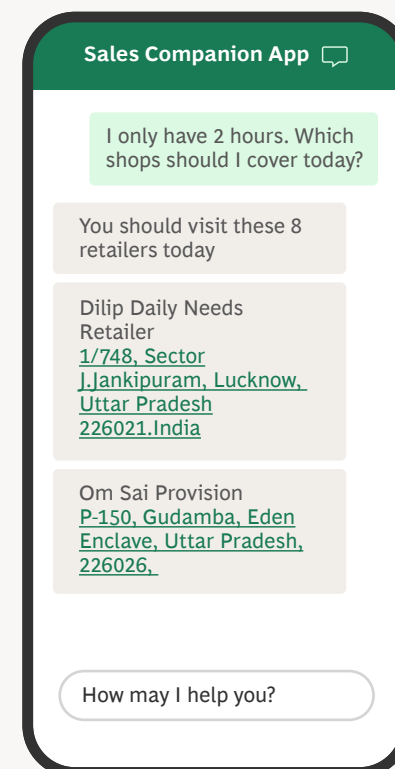
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Anjali Mishra
(frontline salesperson) using a sales companion

Chatbot integrated with salesforce automation using a vernacular text and voice interface

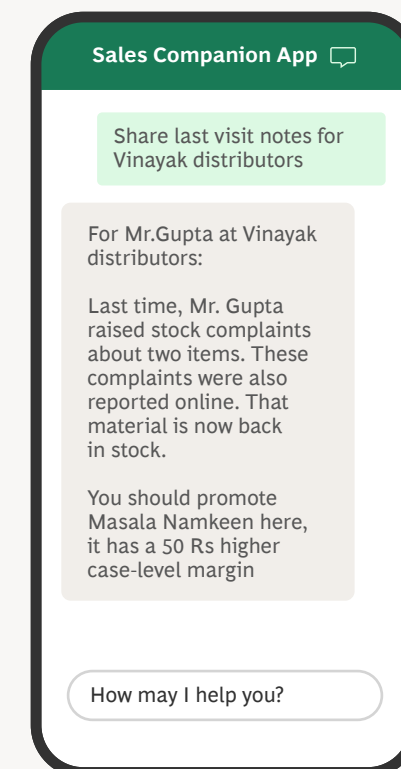
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Dynamic beat planning based on geographic optimization and sales propensity to maximize effective time in market



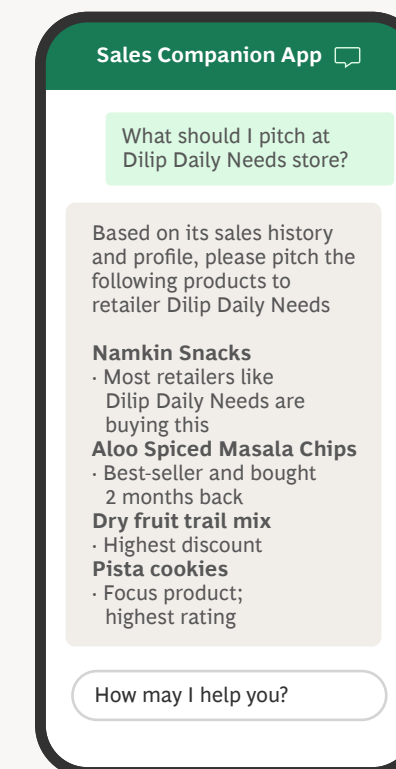
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Real-time synthesis and analysis of conversations to guide channel conversations and drive actions



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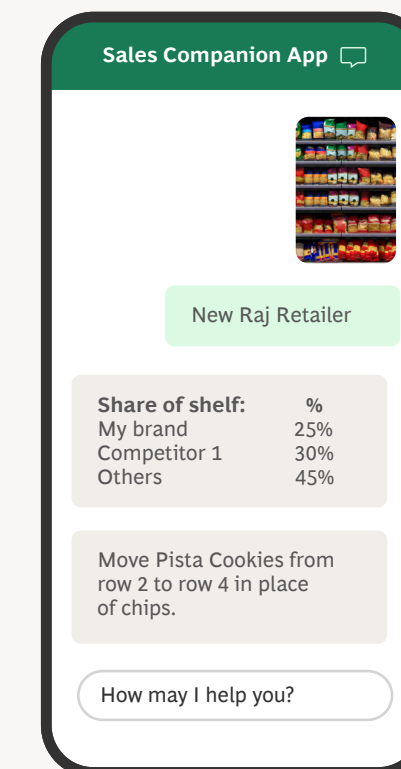
Assisted selling (offers, promos, and pitches) creating hyper-customized "segment of one" recommendations tailored to each store



14:00

AI-powered **real-time image analytics and synthesis** to track planogram adherence and give suggested actions to drive execution

AI-led sales reviews with **focused root-cause analysis** to enable smarter, faster decisions

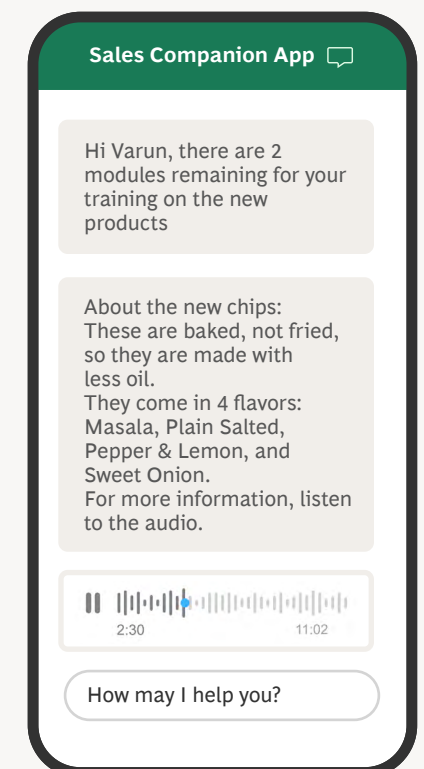
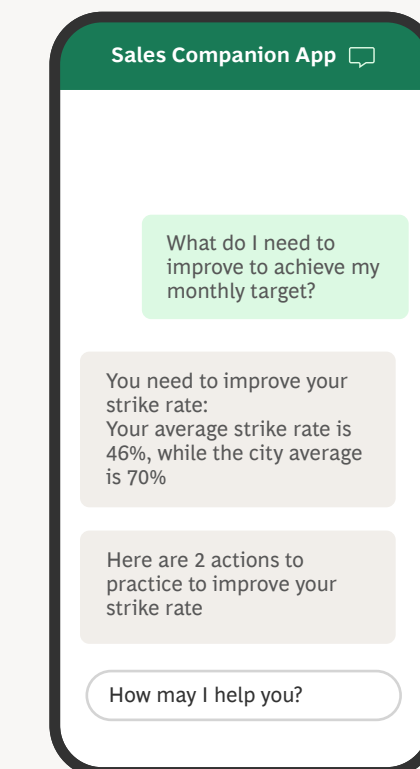


15:50

AI-powered performance management and capability building

- Salesperson-level target setting and incentive-based design to meet market requirements and influence sales behavior
- AI-powered training with personalized modules and learning journey to accelerate AI ramp-up, boost sales performance, and spread best practices, including bite-sized personalized nudges

Illustrative



Source: BCG analysis.

Note: Beat plan = a structured schedule outlining the retailers a salesperson should visit, in what sequence, and how often; planogram = a detail-driven visual diagram or blueprint that dictates exactly where, how, and in what quantity products should be placed on shelves for retail stores.

An AI-led estimation and virtual-mockup tool acts as a business accelerator for influencers

Illustrative

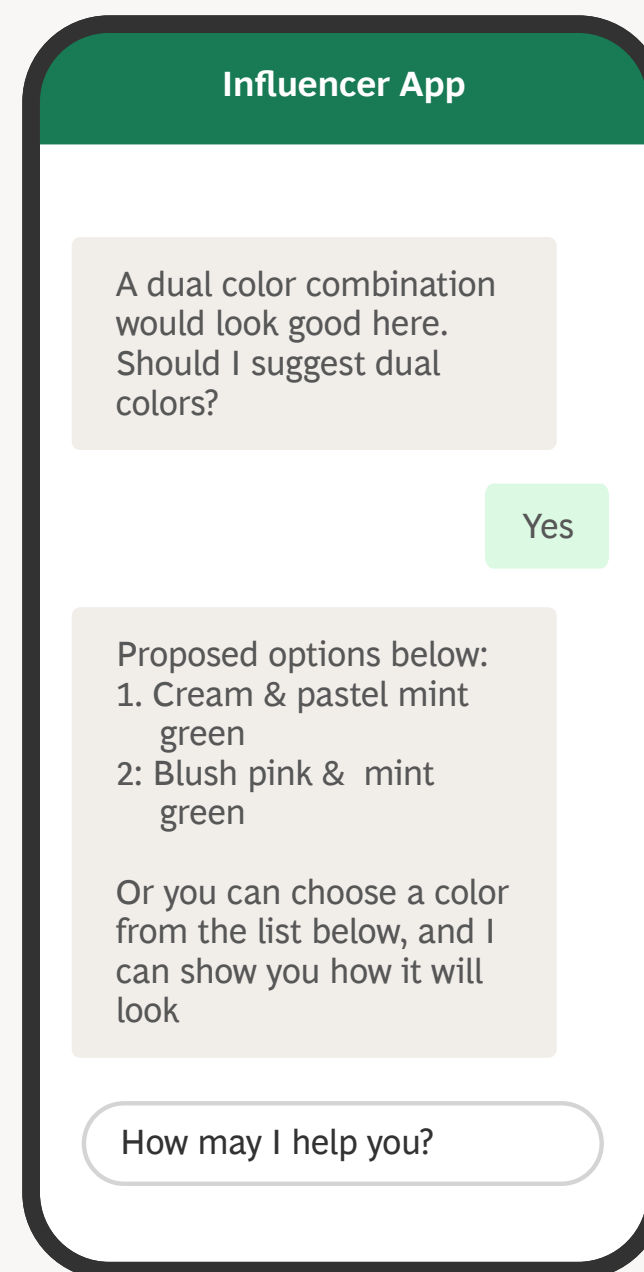
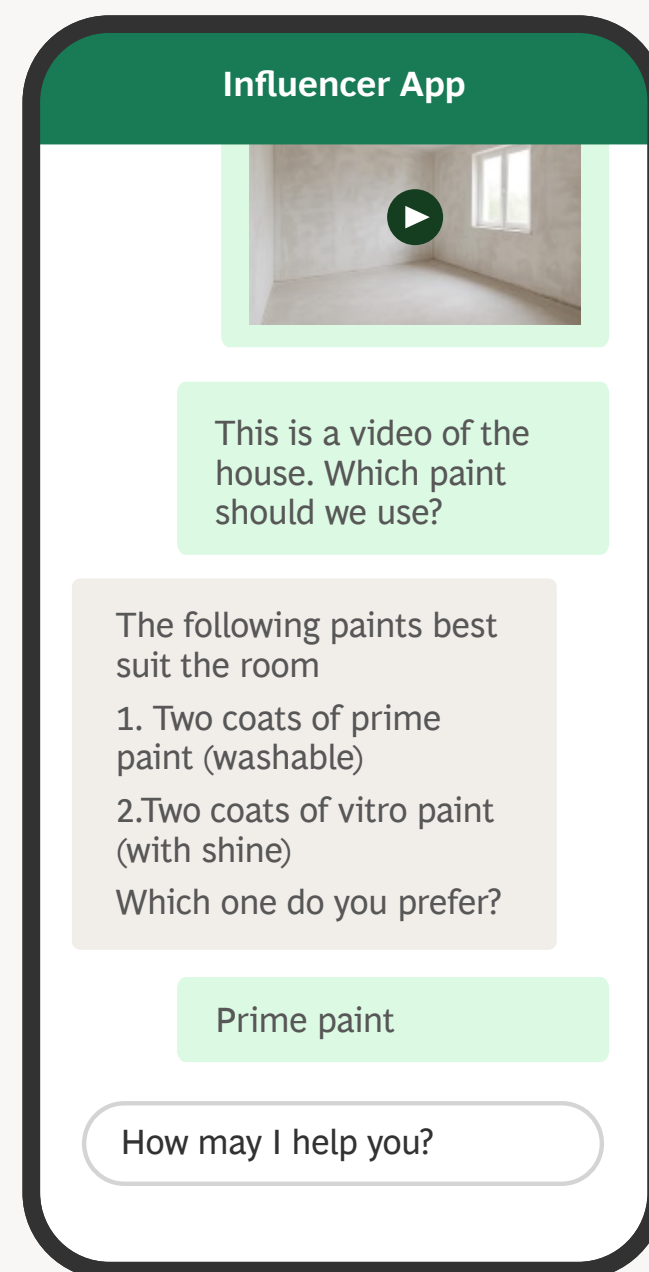


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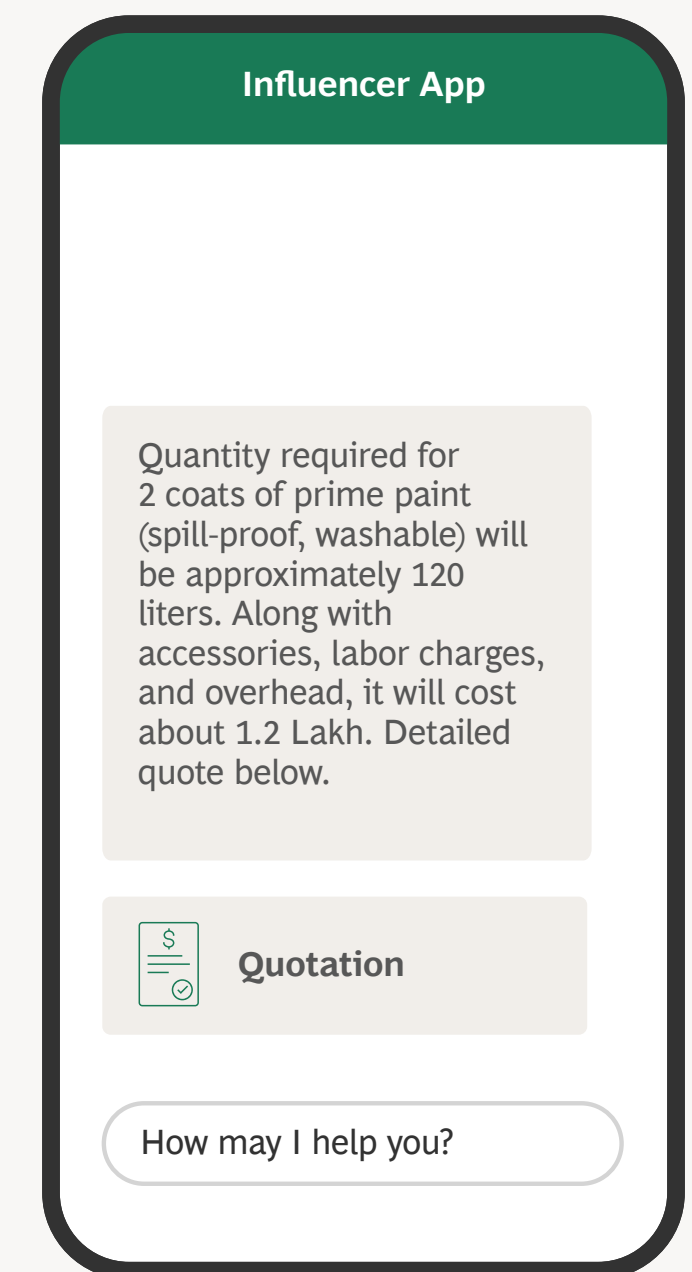
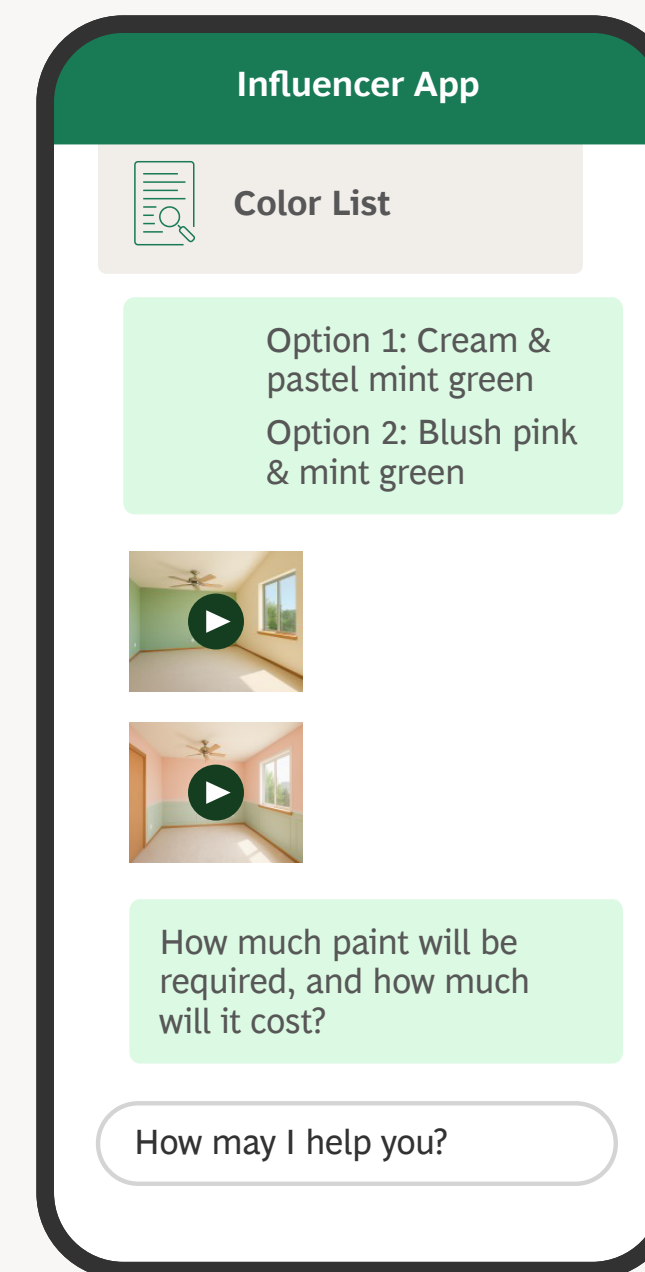
Raju Kumar

- Contractor for painting, repair, and renovation in Meerut
- Size of business < 10 Lakhs per annum
- Going to a new house to assess demand

Analyze site photos for tailored product recommendation, demo, and visualization tools to create previews and a 3D view of installations based on selected SKUs/products



Transform visual inputs and voice descriptions into ready-to-share quotations and project plans using an AI-powered quote engine



Source: BCG analysis.

Note: One Lakh = 100,000 rupees.

AI-Powered Use Cases

AI could support distributed channel models in many ways. While most businesses are not yet implementing AI in their go-to-market approach for emerging markets, tools such as AI companions, digital sales agents, and many others hold tremendous promise.

For example, AI can enhance performance management by creating personalized targets, gamified incentives, and customized training journeys for individual salespeople. It can act as a personal sales analyst, bringing up potential issues and breaking down performance drivers. And it can deliver nudges and alerts to salespeople to highlight gaps in execution, changes in price, and possible performance issues. If there seems to be a slowdown in daily sales, for example, AI can send a nudge offering an incentive if a specific target is reached.

AI also has the potential to rapidly hyper-customize sales plans for individual stores based on factors such as their square footage, location, and finances. And when sales don't go as planned, it can perform a focused root-cause analysis to support smarter, faster responses.

Ten AI-powered use cases across the distributed sales process illustrate the art of the possible

Planning

- 1** AI identifies **high-potential micro-markets and demand pockets using structured and unstructured data** (geospatial, footfall, and store profile) to guide where to play
- 2** AI prioritizes the **right channels, outlets, and influencers** using performance trends, churn signals, online reviews, and store images to focus efforts where it matters
- 3** AI optimizes **trade, credit, and portfolio decisions** through customized (“segment of one”) schemes and targeted commercial interventions to maximize profitability

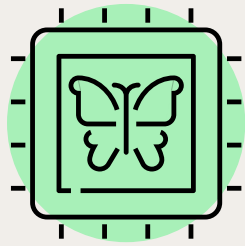
Execution

- 4** AI acts as sales **companion, boosting frontline productivity** through voice and text assistance, dynamic beat plans, and real-time in-store recommendations
- 5** AI-led **digital salesperson** engages retailers and drives demand generation, order capture, and payment collection
- 6** AI enhances **performance management with personalized targets, incentives, and training journeys** tailored to each salesperson
- 7** AI acts as a **personal sales analyst**, surfacing issues and generating driver trees that explain what is powering performance
- 8** AI delivers **always-on nudges and alerts to flag execution gaps, price deviations, and potential performance issues** in real time
- 9** AI provides **business accelerators**: For channel partners, it offers **earnings optimizers** to recommend products and stock levels. For influencers, it offers **space configurators** to recommend products and create 2D/3D visualizations, quotations, and project plans

Operations

- 10** AI transforms sales operations by **automating billing, finances, scheme settlement, and reconciliation** while supporting **faster query resolution**

Companies across industries have already started deploying AI across the sales process

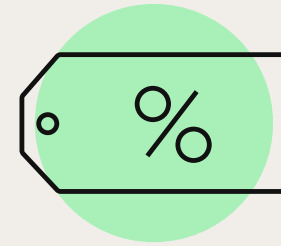


AI-powered sales companion

A mid-size Indian homecare brand deployed an AI companion with the following features:

- Order recommendations
- Lost-sales recovery reminders

Impact: 11% sales uplift in one month

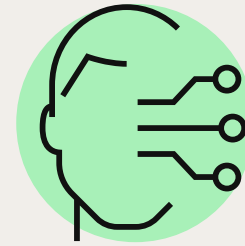


AI-powered sales companion

A leading Indian insurance company deployed an AI companion for its call center agents. The companion assists agents during calls with:

- Real-time root-cause analysis
- Product recommendations
- Nudges

Impact: 15% to 18% savings in average handling time per call



AI-led “digital salesperson”

A leading Indian FMCG company deployed an AI voice agent for order collection from retailers in local languages

Impact: 5% to 10% order collection directly via agent

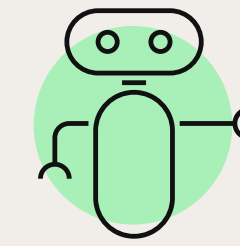


AI-powered sales companion

A multinational CPG player deployed a companion with the following features:

- Dynamic route optimizer
- Nudge engine

Impact: 25% increase in customer-facing time and 8% higher product lines sold per sales call



Digital agent

A leading US fintech deployed an automated bot with a human-like voice to drive conversations for collections

Impact:

- 40% to 50% of calls handled end-to-end
- 30% to 40% savings in inbound call costs

Source: BCG analysis.

Note: FMCG = fast-moving consumer goods; CPG = consumer packaged goods.

How to Get the Most from AI

While recent advances have reduced the complexity of AI, making it far more accessible, companies can face challenges in realizing the technology's full potential. We offer five success factors for getting the greatest value from AI.

- Create a bold vision that fully reimagines outcomes and drives workflow redesign.
- Choose the right high-value use cases to prioritize—and then measure the outcomes and scale the winners.
- Build a strong integrated technology stack of data, predictive AI, GenAI, and AI agents.
- Focus on effective change management, allowing AI to become a part of processes, rather than an add-on.
- Manage AI risks by putting up strong guardrails around accuracy, privacy, and security, while preparing for the future through adaptive governance for agentic AI.

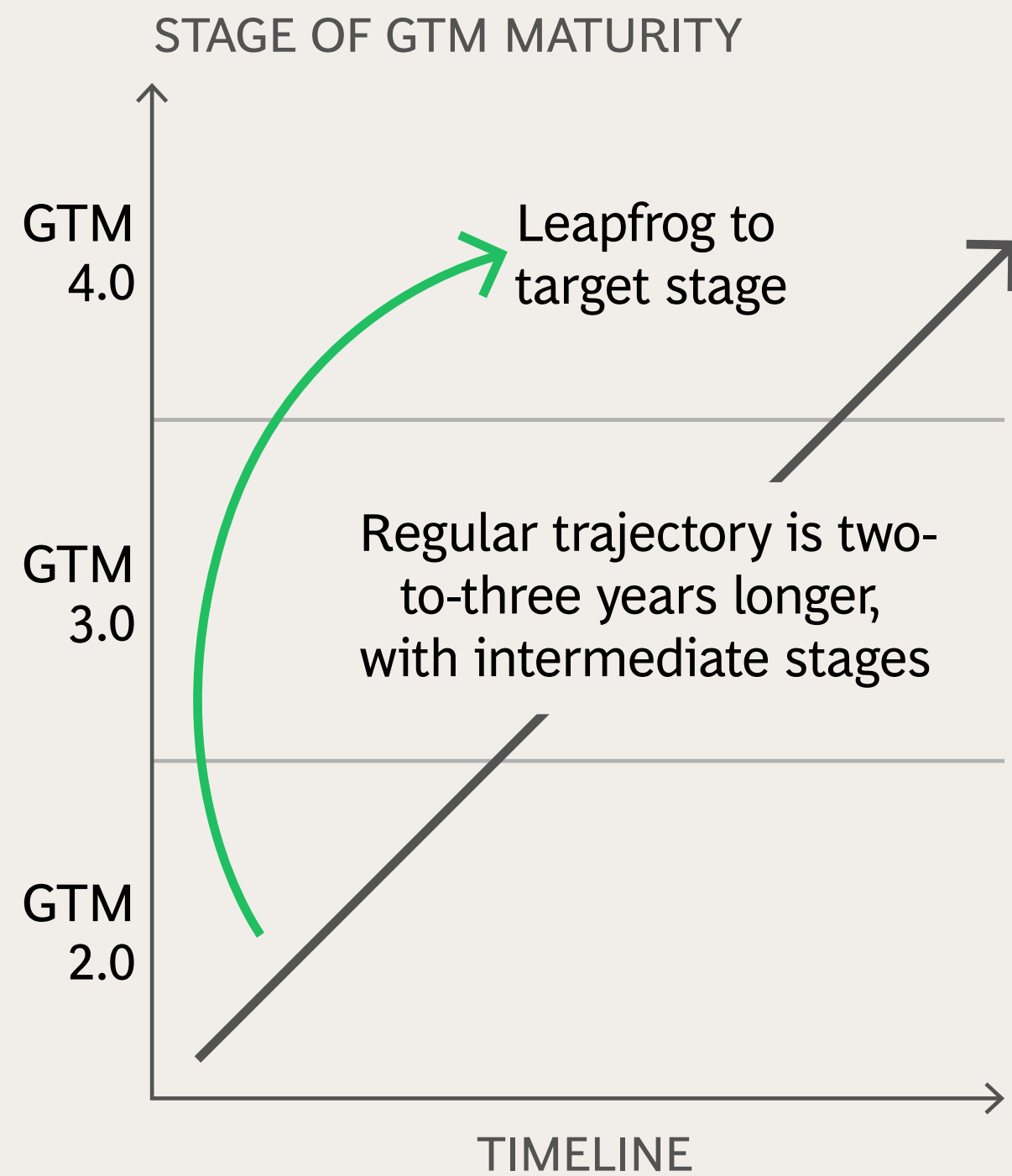
First Steps

As AI becomes increasingly developed and accessible, companies operating in emerging markets should begin introducing it into their distributed channel models to support channel partners in their day-to-day work.

The results? More direct retail coverage, greater store conversion, higher-value products sold, and an enhanced experience for sales agents—all leading to potential sales increases of up to 20%.

AI allows companies with low GTM maturity to leapfrog to GTM 4.0

Leapfrog traditional systems and move directly to GTM 4.0 maturity



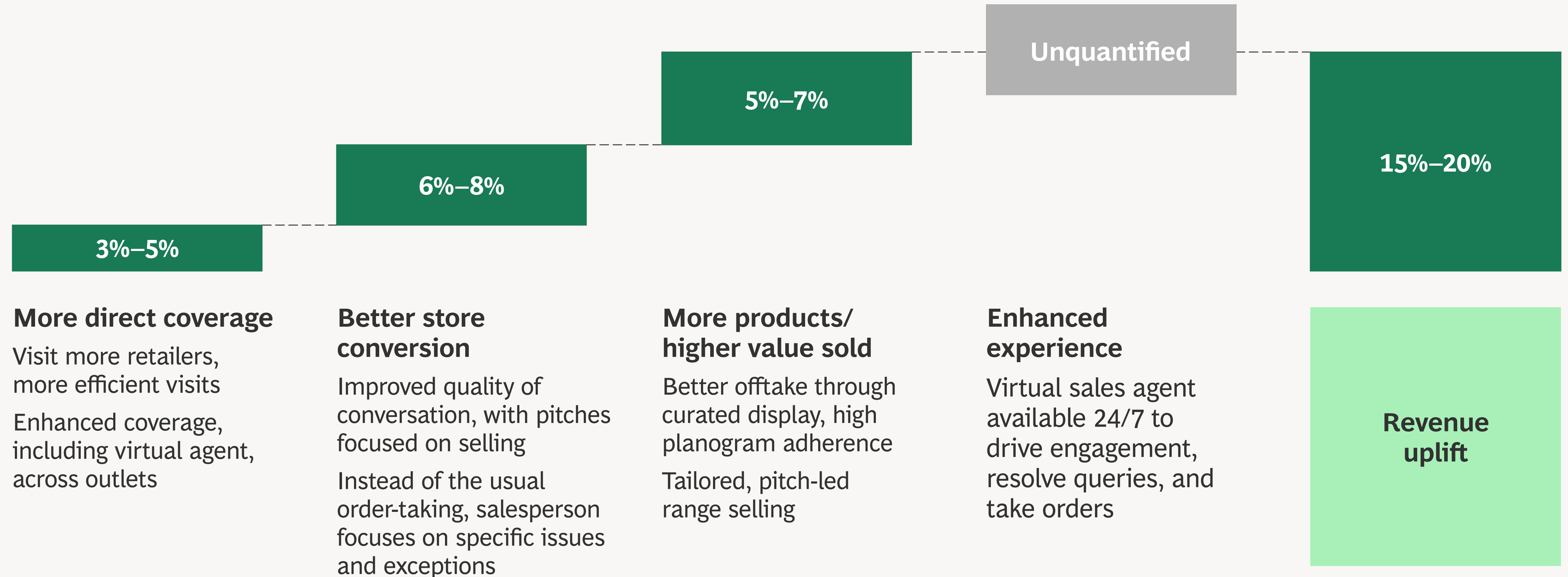
What this means for a frontline salesperson

Illustrative

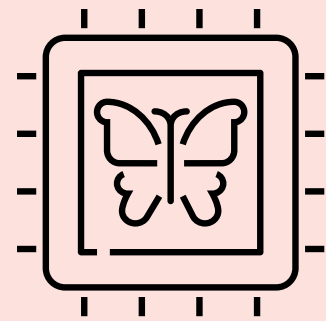
Parameter	Starting Position 2.0	Target State GTM 4.0
 Sales app	Basic app or no app	AI-powered voice/chat interface
 Route optimization	Manual plan	Dynamic route optimizer based on sales propensity
 Recommendation	One-size-fits-all pitch and portfolio	Customized pitches with “segment of one” portfolio
 Nudges and gamification	No nudges	Dynamic nudges to drive performance and maximize earnings
 Incentive- and target-setting	Fixed incentive, offline	Tailored incentive plan and targets

Source: BCG analysis.
 Note: GTM = go-to-market.

AI can help deliver 15% to 20% annualized revenue growth in distributed sales



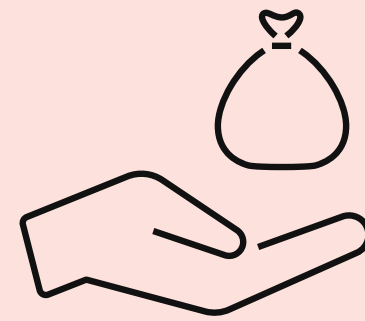
Five challenges organizations face in getting value from AI



Lack of clear North Star for AI-led transformation

Many company leaders fail to rethink what is possible with AI, resulting in scattered pilots rather than coherent transformation agendas

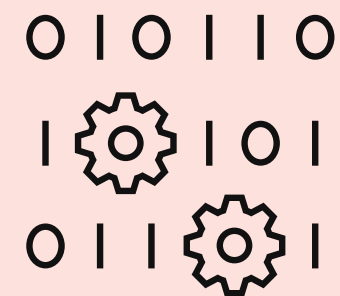
Most organizations focus on tools, not outcomes



Cost pressure and ROI requirements limit scaling

Companies face tension between expected speed of return and reality

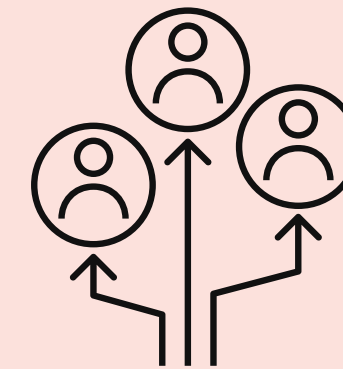
AI is different from traditional digital, as more deployment can lead to higher costs, requiring discipline



Data quality and inadequate master data governance

Data is sparse, fragmented, and frequently missing due to organizational or process changes

There are multiple touchpoints where data is not captured

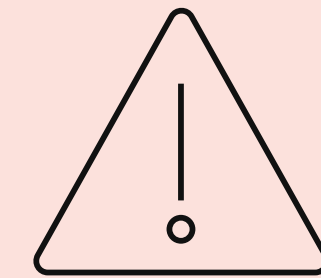


Driving sustained adoption across stakeholders

Teams revert to legacy workflows even when AI tools are available

Frontline adoption remains low despite high technical accuracy

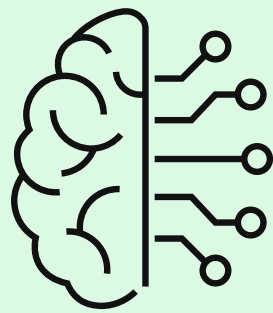
Incentives are often misaligned with AI-driven actions and recommendations



Low reliability and trust in AI output

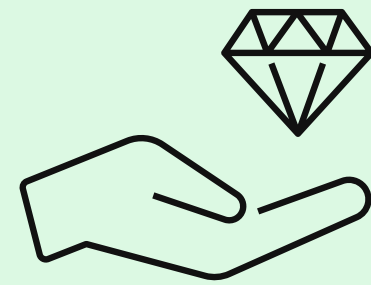
Companies find it challenging to validate AI outputs, ensure the accuracy of AI-driven recommendations, and gain confidence that AI will work under all conditions

Five success factors for deriving value from AI



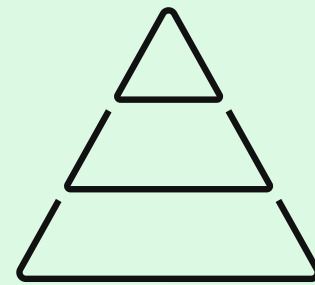
Break through AI's imagination gap

Reimagine outcomes and redesign workflows to move beyond small automations and toward transformational impact



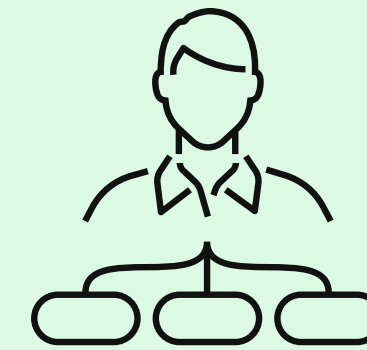
Prioritize high-value use cases and track ROI

Focus on a few use cases that drive the most value, and measure outcomes rigorously to build early momentum



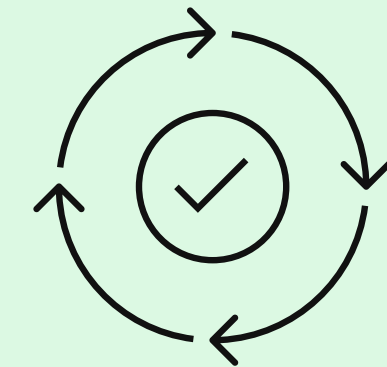
Build an integrated stack of data, PredAI, GenAI, and AI agents

Shift from siloed tools to a unified, modular architecture that connects enterprise data with predictive, generative, and agentic capabilities



Focus on change management

Prioritize change management—redesigning workflows, roles, and incentives—as it is a far greater factor in AI success than the sophistication of the technology itself



Manage AI risks and prepare for what's next

Put strong guardrails around accuracy, privacy, and security while building adaptive governance for emerging agentic AI

Source: BCG analysis.

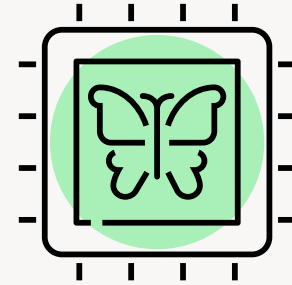
Note: PredAI = predictive AI; GenAI = generative AI.

Company leaders can begin with these steps



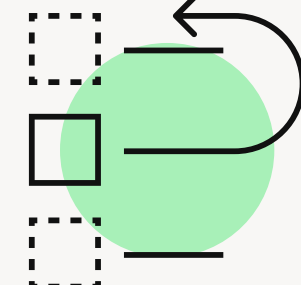
Set a clear objective

Anchor AI ambition to clear business outcomes by defining the value AI must deliver and how success will be measured



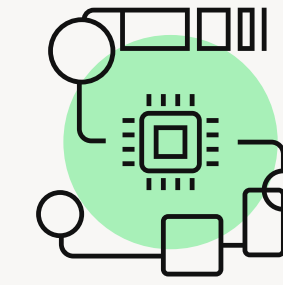
Define the North Star

Define a clear North Star for where and how AI should transform the business



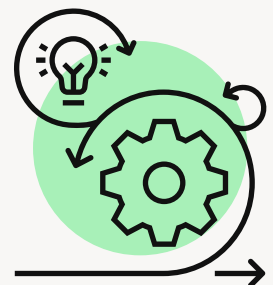
Prioritize use cases

Start from existing use cases and value pools and prioritize a small set of high-impact opportunities



Build tech capabilities

Build data and technology roadmaps in parallel, choosing a target AI stack that supports the prioritized use cases



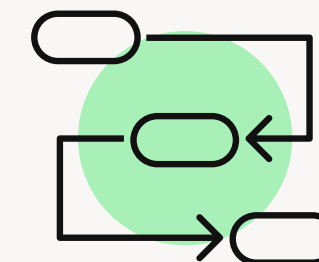
Build proof of concept

Design pilots with the intent to launch, not just experiment, before moving rapidly into production



Drive change management

Drive adoption from day one by redesigning workflows, aligning incentives, and building AI fluency



Create a playbook and scale it

Institutionalize learnings and scale what works by codifying successful use cases

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