iOPEX



Enterprise SaaS / CX Management

Global

Global CXM Leader Cuts Multi-Day Account Audits to One Unattended Run with an AI Audit Console

A global CXM platform audits enterprise accounts to see whether customers use what they bought, and each audit required analysts to spend days navigating contracts and performing manual checks. Audit effort grew with every new account, which limited coverage and consistency at the point where customer insight mattered most. iOPEX transformed this process into a configurable, **one-click audit console** that automates data collection, AI-assisted interpretation, analysis, and reporting.

Highlights

- Analysts had to execute 150+ feature workflows and 39 account-level checks across six audit dimensions, while manually reconciling selected findings against contract documents.
- iOPEX built a reusable audit console combining browser automation, vision AI, document intelligence, and automated report generation across live platform and contract data.
- A multi-day analyst-led exercise was transformed into a single unattended run, allowing analysts to focus on interpreting findings and engaging customers rather than collecting data.

Business Challenge

For the global CXM platform, customer-account audits were an essential part of understanding whether customers were using the capabilities they had purchased. But the audit process itself was highly manual.

Each audit involved **150+ feature-level workflows** alongside **39 account-level data points** spanning usage, adoption, consumption, health, telemetry, and risk. Analysts signed into the platform, navigated to each screen, interpreted what they saw, and recorded the result in a spreadsheet. They then cross-checked selected findings against the customer's Statement of Work and Order Form.

The methodology was well established, and its execution depended on analyst hours. Three pressures grew with the customer base.



Capacity

Effort scaled linearly with every account added, so audit coverage was bound by analyst time.



Consistency

Analysts navigated and documented findings in slightly different ways, which made results harder to compare across accounts and review cycles.



Traceability

Manually captured findings carried limited evidence for later review.

The client needed to automate data collection, bring platform and contract data into a single run, standardize output, and preserve evidence behind each finding while keeping its existing audit methodology intact.

iOPEX Solution

iOPEX designed and built an **AI-powered Audit Console** that converted the established audit methodology into a configurable, one-click automated workflow.

The console allows an analyst to select the required product seats, groups, and features, initiate a run, and receive a completed audit workbook. It automates the underlying navigation, data collection, interpretation, analysis, and reporting steps that previously required manual execution.

Rather than redesigning the client's audit methodology, iOPEX codified the existing process into an automation framework. The resulting console reproduces the established audit process consistently while making execution reusable across customer accounts.

Strategy and Planning

Codified the existing audit methodology

Each audit workflow was mapped from the client's established audit template, including the required navigation path and criteria for a valid finding. This allowed the automation to reproduce the existing process consistently while retaining the analysts' familiar output format.

Designed for reuse

Audit scope was separated from the underlying automation. New features or customer accounts can therefore be introduced through configuration rather than requiring a new development effort.

Inside the AI Audit Console

Configurable Scope:

Audit scope sits apart from the automation layer. New features and customer accounts are added through configuration, with no new development.

Two Audit Engines, One Run:

An account-level engine covers 39 data points across six dimensions. A feature-level engine covers 150+ workflows. Both run from a single workbook in one execution.

Three-Source Routing:

For each audit requirement, the console determines the right source, whether the live platform, the Statement of Work, or the Order Form, and routes the query accordingly.

Live-Session Browser Automation:

The console signs into the platform, navigates workflows, searches and filters data, and captures findings. Full-workflow retries prevent transient platform delays from silently dropping audit rows.

Vision AI for Visual Data:

Where information exists only on screen, such as dashboards, empty states, or wide multi-column tables, the console captures screenshots and interprets them with vision AI. Wide tables are read through horizontal scrolling across multiple captures. Every screenshot is retained as evidence.

Automated Analysis and Reporting:

The pipeline generates parameter-level observations, recommendations, and an executive account narrative, writes them back into the audit workbook, and makes the report available for download.

Technology Stack

Layer	Technology	Role
Frontend	React, Vite	Scope selection, run progress, and results dashboard
Backend	Python, FastAPI	Workflow orchestration, status, results, schema, and downloads
Browser automation	Playwright, Headless Chromium	Platform navigation, filtering, scraping, session reuse, and screenshots
AI / LLM	Anthropic Claude, including vision	Screen interpretation, findings, recommendations, and executive narrative
Document intelligence	PDF extraction + LLM Q&A	Reading Statements of Work and Order Forms
Data layer	Excel, openpyxl	Audit scope definition, findings, and final output

The Result

The transformation **turned audit execution into an automated intelligence pipeline, moving analysts from collecting evidence to acting on it.**

150+ **Feature workflows automated**

39 **Account-level data points automated**

6 **Audit dimensions covered**

3 **Data sources unified**

The resulting operating model enables:

Single-run execution:

A customizable console lets analysts define the audit scope and determine what the web application will execute, from feature-level audits to product groups and account-level checks. Once initiated, the audit runs unattended and returns a completed workbook.

Higher-value analyst work:

Analysts spend less time navigating screens and entering data and more time interpreting results, identifying opportunities, and engaging customers.

Consistent audit methodology:

Standardized execution and phrasing make findings more comparable across accounts and audit cycles.

Reusable automation:

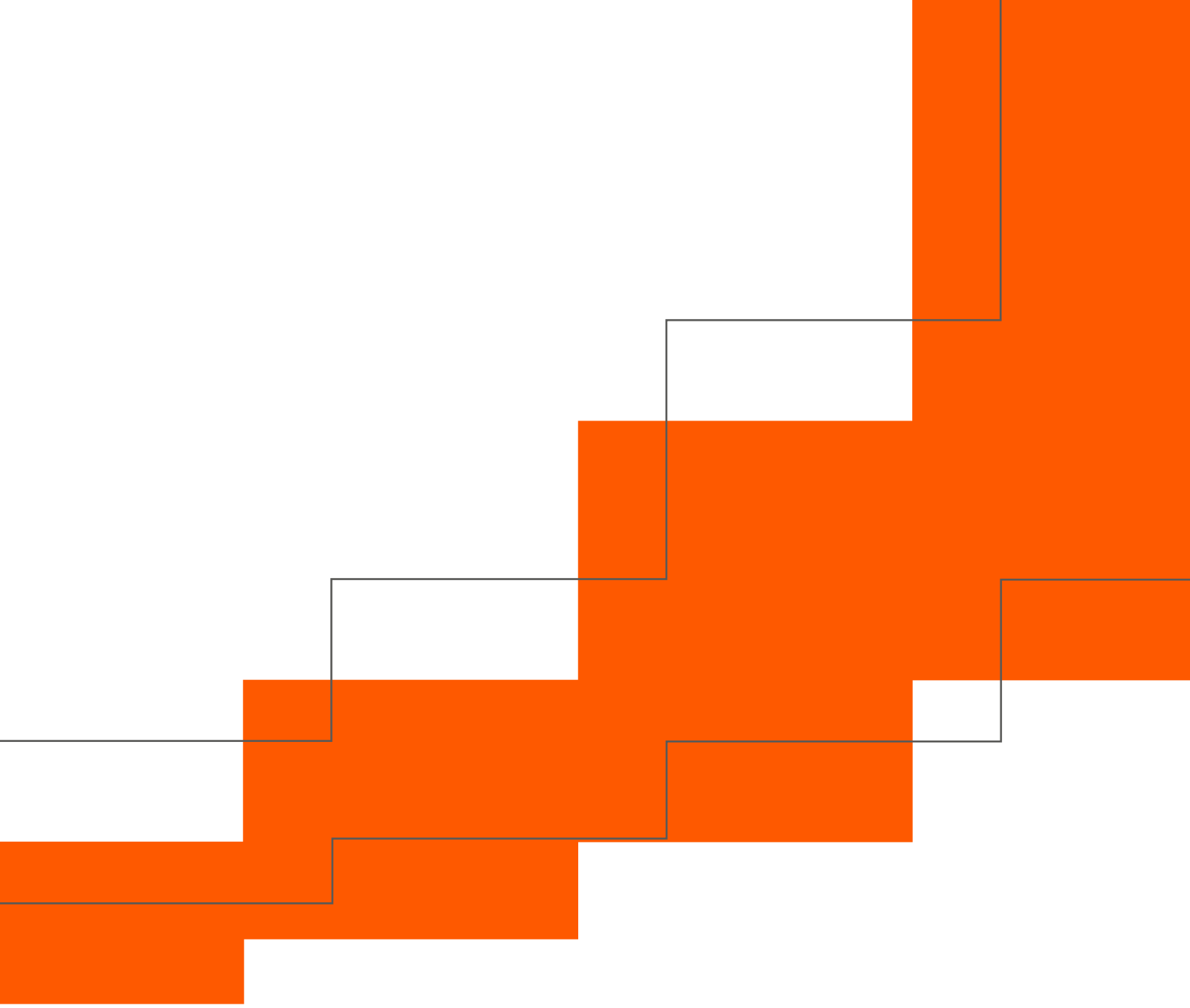
The same pipeline can be applied across customer accounts through configuration rather than rebuilding the process.

Greater audit coverage:

Removing analyst-hour constraints enables more accounts to be reviewed more frequently and with faster access to evidence-backed findings.

Built-in auditability:

Findings are supported by retained screenshots showing the source information used by the automation.



About iOPEX

iOPEX Technologies is a new-generation agentic AI and automation-led enterprise transformation partner headquartered in San Jose, California. At the intersection of enterprise operations, agentic AI, and intelligent automation, we deliver **Intelligence as a Service.**

Over 70 global brands trust iOPEX as a strategic partner to turn AI into results that scale. We help clients accelerate enterprise transformation without endless consulting cycles by embedding intelligence directly into workflows. www.iopex.com.

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