

Case Study:

Using LLMs with Your ERP

What the Company Does / Industry

The company is a professional services firm specializing in environmental, infrastructure, resilience, sustainability, and government services, supporting public-sector and enterprise clients with complex operational and financial data.

The Problem That Led to the Project

The company faced two related challenges:

- ERP and data warehouse complexity: Hundreds of project managers needed answers locked inside ERP and financial systems.
- Proposal & procurement inefficiency: Teams spent 40–100+ hours manually researching and summarizing historical data for proposals and purchase order analysis.

Low-code tools and Copilot experiments failed due to context window limits, lack of grounding, and cost concerns, prompting the company to seek a custom solution.

How We Solved It (Technology + Approach)

We built domain-specific LLM agents tightly integrated with the company's ERP and data platforms:

- ✓ RAG-based architecture using the company's proprietary data
- ✓ Natural-language queries translated into secure, optimized SQL
- ✓ Expansion into "Analyst" and "Procurement" AI agents

This enabled business users to ask real questions—"What's our PO exposure?" or "Summarize prior project performance"—without learning SQL or ERP schemas.

If your ERP is a system of record but not a system of insight, LLMs can bridge the gap—when they're grounded in your data, not generic copilots. The key is designing agents that respect cost, security, and domain logic from day one.



Thinking through a similar challenge?

This project is one example of how the right cloud strategy creates real business impact. Connect with Serverless Solutions to see what's possible for your team.



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