

Transforming capital markets with an agentic, enterprise knowledge AI platform

Client

One of the world's leading capital investment organizations

Company Size

9,000+ employees

Location

Global, headquartered in New York

Featured Partners



One of the world's leading capital investment organizations set out to transform how its revenue teams access and act on enterprise knowledge. Sales and marketing data was distributed across systems such as Marketo and Salesforce, limiting visibility into lead quality, engagement history, and pipeline health.

Marlabs delivered an agentic, enterprise knowledge AI platform that unified revenue data and enabled teams to interact with it through a conversational AI agent. By translating fragmented signals into contextual, explainable insight, the platform empowered business development reps (BDRs) to prioritize opportunities faster and engage prospects with greater confidence and relevance.



AI Strategy



Custom
Generative AI
Solutions



AI Governance



Agentic AI



The Challenge: Fragmented revenue data limited insight and action



Objective: Enable revenue teams to quickly access trusted, contextual insights that support faster and more informed engagement decisions.



Existing Issues: Critical sales and marketing signals were siloed across platforms, leaving lead scores without explanation and pipeline quality difficult to assess.



Solution Needed: Marlabs delivered an agentic, enterprise knowledge AI platform that unified revenue data and surfaced actionable insights through a conversational AI agent.



Outcome: BDRs gained real-time, explainable intelligence that reduced manual research and improved prioritization and outreach quality.



Sales and marketing teams relied on multiple disconnected systems to manage engagement and pipeline activity, resulting in fragmented visibility into lead quality and account context. As a result, BDRs spent significant time researching data instead of engaging prospects, slowing response times and reducing overall effectiveness.

The Solution: An agentic, enterprise knowledge AI platform

Marlabs designed and implemented an agentic, enterprise knowledge AI platform that enables users to query, synthesize, and interpret sales and marketing data through a conversational AI agent. The platform transforms enterprise data into actionable intelligence that fits naturally into day-to-day revenue operations.

Phase 1: Enterprise Data Foundation

Marlabs unified revenue data into a single, governed knowledge layer.

Workstreams:

- System integrations
- Data normalization and signal alignment
- Knowledge model design

Phase 2: Intelligence & Prioritization

We applied a GenAI context engine, an AI scoring model, and predictive analytics capabilities to the platform to evaluate lead and account context across engagement and sales signals.

Workstreams:

- AI-driven journey prioritization scoring
- Identification of key positive and negative signals
- Contextual summaries generated at query time

Phase 3: Conversational AI Agent Experience

Marlabs delivered a conversational AI agent that allows BDRs to access enterprise knowledge using natural language.

Workstreams:

- Natural-language query orchestration
- Real-time retrieval of prioritized insights
- Explainable responses grounded in enterprise data

Phase 4: Secure Deployment & Enablement

We deployed the platform in a secure, cloud-based environment and rolled it out through a phased adoption approach.

Workstreams:

- Enterprise access controls and auditability
- Pilot deployment with revenue teams
- Training, feedback, and continuous optimization

Services and Technologies Used:

Services:

- GenAI Strategy & Consulting
- Custom AI Skill Development
- AI Governance Framework Design
- Agentic AI

Technologies:

- AWS – Lambda, Bedrock, and Q
- Python
- Terraform
- PgVector
- Marketo
- Salesforce

The Results: Impact on the client organization

The agentic, enterprise knowledge AI platform transformed how revenue teams accessed and applied enterprise data by replacing manual research with conversational, AI-driven insight. By unifying sales and marketing signals into a single knowledge layer, the solution improved prioritization, increased confidence in outreach decisions, and established a scalable foundation for future agentic AI capabilities.



Improved BDR Productivity: The platform reduced time spent manually researching leads, allowing BDRs to focus more of their effort on high-value engagement.



Increased Pipeline Visibility: Unified enterprise knowledge provided clearer insight into pipeline health and lead readiness earlier in the sales cycle..



Faster Lead Prioritization: AI-driven journey scoring and contextual summaries enabled teams to identify and act on high-potential opportunities more quickly.



Scalable Agentic AI Foundation: The solution established a secure, extensible platform for expanding agentic AI use cases across the revenue organization.



Higher Quality Outreach: Explainable insights into positives and risks helped BDRs tailor messaging to each prospect's specific context.



Stronger Decision Confidence: Real-time, trusted insights reduced uncertainty and improved consistency in engagement decisions.