

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 teams access and act on enterprise knowledge. Organizational data was distributed across over 20 systems, including Salesforce, Marketo, Confluence, Jira, GitLab, Workday, Zendesk, and ServiceNow. This limited visibility into lead quality, internal and external engagement history, pipeline health, project management needs, HR information, and more.

Marlabs delivered an agentic enterprise knowledge AI platform that unified data and enabled teams to interact with it through a conversational AI agent that not only answers queries but also generates reports and intelligently searches documents. By translating fragmented signals into contextual, explainable insight, the platform empowered employees to prioritize opportunities faster and work with greater confidence and relevance.



AI Strategy



Custom
Generative AI
Solutions



AI Governance



Agentic AI

The Challenge: Fragmented enterprise data limited insight and action



Objective: Enable teams to quickly access trusted, contextual insights that support fast, informed decisions.



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



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



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



Internal teams relied on over 20 disconnected systems to manage their day-to-day efforts, resulting in fragmented visibility. As a result, employees spent significant time researching data before they could move forward with their work, slowing efforts 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 company data through a conversational AI agent. The platform transforms enterprise data into actionable intelligence that fits naturally into day-to-day operations.

Phase 1: Enterprise Data Foundation

Marlabs unified company 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 context across systems and 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 employees 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:

- AI Strategy
- Generative AI
- AI Governance
- Agentic AI

Technologies:

- AWS – Lambda, Bedrock, and Q
- Python
- Terraform
- PgVector
- Salesforce
- Marketo
- Confluence
- Jira
- GitLab
- Workday
- Zendesk
- ServiceNow

The Results: Impact on the client organization

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



Improved Productivity: The platform reduced time spent manually researching information, allowing employees to focus more of their effort on high-value tasks.



Increased Visibility: Unified enterprise knowledge provided clearer insight into organizational health across departments.



Faster Lead Prioritization: AI-driven journey scoring and contextual summaries enabled sales 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.



Higher Quality Work: Explainable insights into positives and risks helped employees tailor efforts to meet their specific context's needs.



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