

Transforming capital markets with an agentic, enterprise knowledge AI platform

Client

One of the world's leading capital investment organizations

Company Size

10,000+ employees

Location

Global, headquartered in New York

Featured Partners



A capital investment client 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 answers queries, generates reports, and intelligently searches documents. Our proprietary PromptRouter® solution routes each request to the most cost-effective model while keeping AI use within corporate guidelines. The platform has delivered an estimated \$14M in value, and users find what they need in fewer than two prompts on average.



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:

- PromptRouter® query orchestration across 66 large language models (LLMs)
- 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 to enterprise-wide rollout
- Training, feedback, and continuous optimization

Services and Technologies Used:

Services:

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

Technologies:

- PromptRouter® (Marlabs proprietary)
- 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. The platform has delivered an estimated \$14M in value, unified signals into a single knowledge layer, and established a scalable foundation for future AI capabilities.



Estimated \$14M in Value: From July 2025 to April 2026, the platform had up to 150% more engaged users than GitHub, Microsoft 365, and Zoom AI tools, lowering overall AI cost.



Agentic AI at Scale: The platform hosts 7,431 agents, including 1,609 active agents led by agents for general chat, code review, and invoice processing.



High Accuracy: Users find the results they need in an average of 1.79 prompts, which reduces task friction and repeat queries.



Enterprise-Wide Adoption: Over 55% of the 10,000+ employee workforce have adopted the platform and submitted nearly a million prompts.



Cost-Optimized Orchestration: PromptRouter® orchestrates requests across 66 LLMs and matches every request to the most cost-effective model.



Increased Visibility: A unified knowledge layer across 20+ systems gives teams clearer insight into organizational health across departments.