Empowering Sales with Al-Driven Sustainability Insights

Al-Powered ESG Insights driving 15% Upsell Growth for a Global Tech Leader

Delivered by Agivant | Powered by Salesforce + GPT-40 + Sustainability Data APIs



- ESG data was scattered across unstructured public sources (e.g., SEC filings, CDP, Zero Tracker).
- Sales lacked real-time, account-specific sustainability insights.
- Manual research delayed outreach and limited upsell opportunities.
- No system to track and engage "Sustainability-Aware" customers.

Agivant's Al-powered Sustainability Insights Solution

Agivant built an AI-powered sales assist engine to generate dynamic, account-level sustainability reports by pulling data from SEC 10-Ks, CDP, Zero Tracker, and Salesforce, surfacing ESG insights directly in the sales workflow.

Key Capabilities Deployed

Salesforce + ESG Data Integration

Consolidated
customer data in
Salesforce Sales
Cloud and
connected to SEC
10-K, CDP, and
Zero Tracker via
Salesforce
Connect

Smart Customer Tagging

Used AI and rule-based logic to classify accounts as "Sust-Care" based on ESG disclosures and targets.

One-Pager Sustainability Reports

Auto-generated concise reports using GPT-40 and ESG data, personalized per account.

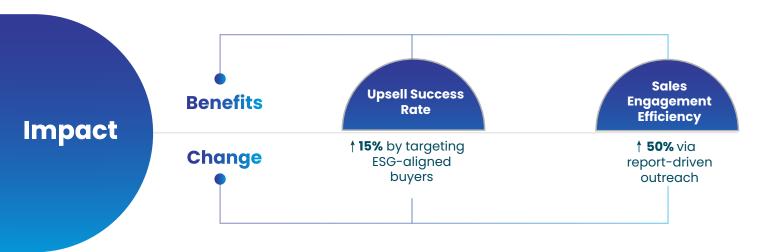
Insights in Salesforce & Power Bl

Delivered reports
and tags within
Salesforce
Lightning and
Power BI
Dashboards,
keeping sales
teams informed in
real-time.

Tech Stack

- Salesforce: Sales Cloud, Salesforce Connect
- ChromaDB, GPT-4o
- Snowflake

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Voice of the Customer

Our sales teams now walk into conversations with sustainability intelligence that gives us a competitive edge. We don't just sell better-we sell smarter.

Agivant Services

Al and Data

Cloud Transformation

Platform Engineering

Agivant: Your partner for a faster, smarter, more agile future











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