



Empowering Sales with AI-Driven Sustainability Insights

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

Delivered by Agivant | Powered by Salesforce + GPT-4o + Sustainability Data APIs

A global technology enterprise sought to empower its sales teams to **differentiate product upgrades through sustainability insights**. However, several challenges emerged:

- ▶ 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 AI-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-4o and ESG data, personalized per account.

Insights in Salesforce & Power BI

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

Impact

Benefits

Change

Upsell Success Rate

↑ 15% by targeting ESG-aligned buyers

Sales Engagement Efficiency

↑ 50% via report-driven outreach

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

AI and Data

Cloud Transformation

Platform Engineering

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



Measurable outcomes to drive transformative growth

Business @Impact



Differentiated Solutions for disruptive innovation

Innovate @Core



Agile and Adaptive approach to changing tech ecosystem

Build @Speed



Experts with Amplified AI capabilities

Growth @Scale



Partner to create an impact and change 50K lives

Purpose @Change