

Sales Intelligence AI Copilot

Project Overview

Designed and developed an AI-powered Sales Intelligence Copilot that helps sales teams prepare for customer engagements, automate administrative work, and identify revenue opportunities. The application combines enterprise CRM data, customer communications, product documentation, and large language models (LLMs) to deliver personalized recommendations and actionable insights throughout the sales lifecycle.

The solution assists account executives by summarizing customer interactions, generating meeting briefs, recommending next-best actions, drafting personalized emails, and answering questions using enterprise knowledge. By automating repetitive tasks, the platform enables sales professionals to spend more time building customer relationships and closing opportunities.

Architecture & Solution

The copilot integrates securely with CRM platforms, collaboration tools, document repositories, and business intelligence systems through REST APIs and enterprise authentication. A Retrieval-Augmented Generation (RAG) architecture combines vector search with LLMs to provide accurate, context-aware responses grounded in approved company knowledge.

The platform includes conversation memory, prompt management, role-based access control, observability dashboards, audit logging, and feedback mechanisms to continuously improve response quality. Modular services support future expansion into forecasting, pipeline analysis, and customer success workflows.

Business Impact

The solution reduced administrative effort for sales representatives, improved the quality of customer interactions, accelerated opportunity qualification, and increased consistency in customer communications. Managers gained better visibility into pipeline health through AI-generated summaries and insights, while reusable AI services reduced development time for future sales automation initiatives.

Key Capabilities

- Customer and opportunity summaries
- AI-generated meeting preparation
- Next-best-action recommendations
- Personalized email generation
- CRM and enterprise system integration
- RAG-powered enterprise knowledge search
- Conversation memory and contextual assistance
- AI governance, monitoring, and audit logging

Technologies

Python, Azure OpenAI/OpenAI APIs, LangChain, Vector Database, Microsoft Graph API, REST APIs, CRM Integration (Salesforce/Dynamics), OAuth 2.0, Prompt Engineering, Docker, Kubernetes.