



Enterprise AI in Action

Use Case

Enterprise AI for Sales Prospecting

CLIENT

Major Financial Asset Manager.

SITUATION

Customer has licensed a very large public dataset of documents related to public pension fund performance, but due to the very large document corpus, its team was unable to manually read all of the documents to locate appropriate sales opportunities.

INDICO SOLUTION APPROACH

1. Indico loaded documents into Indico Teach module.
2. Customer subject matter experts (SMEs) labeled a few hundred sample documents to identify language indicating high probability sales opportunities.
3. Using Indico, the client is able to process the entire monthly corpus to identify sales opportunities.
4. Indico pushes opportunities programmatically into the client's Salesforce API for distribution to sales reps for follow up.

IMPACT

- Indico is able to provide 100% analysis coverage of all licensed documents to quickly identify sales opportunities for customer salesforce.
- This is dramatically improving lead identification velocity and ensuring the client is "first to the table" with new prospects.



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