

Agentic Data Insights

An ADAM Foundational Solution

From Complexity to Clarity: Accelerate Decisions Using Automated Insights.

Business Challenge

Organizations face significant hurdles in extracting actionable insights from coaching and feedback data, often in unstructured and structured formats, such as post-session reviews and meeting notes. This complexity demands substantial effort to derive meaningful insights for both quantitative and qualitative analysis. As a result, the process becomes labor-intensive and inefficient, impeding the ability to make timely, data-driven decisions that could enhance sales effectiveness and overall performance.

Brillio's LLM-powered Chatbot Solution for Automated Insight Extraction

Our Agentic solution automates the extraction of insights from unstructured coaching feedback data. It allows users to enter queries in natural language over structured data:

- **Data Search and Indexing:** Searches, analyzes, and indexes unstructured data (for example, text feedback, competency metadata, metrics) stored in Snowflake.
- **Optimized SQL Query Construction:** Constructs optimized SQL queries based on business rules and Snowflake's table schemas to retrieve structured data, integrating it with insights from unstructured data.
- **Comprehensive Data Analysis:** Analyzes structured and unstructured data to provide relevant insights, including trends, performance metrics, and feedback patterns.

Use Case Examples

An autonomous **Insights Agent** leverages advanced routing capabilities to ingest and process coaching data from enterprise data sources like Snowflake. It intelligently distinguishes between:

- **Structured data** (e.g., performance ratings, activity metrics, and tenure) are routed to **Cortex Analyst** to identify underperforming reps and aggregate performance trends.

- **Unstructured feedback** (e.g., manager coaching notes, 1:1 summaries) was sent to **Cortex Search**, extracting recurring coaching themes, sentiment patterns, and focus areas.

The agent autonomously merges insights from both streams to surface answers to complex, strategic questions, such as: “What coaching themes consistently appear among underperforming reps, and how do they differ from top performers?”

By transforming fragmented coaching feedback into an intelligent, always-on insights engine, we empower sales leadership to shift from reactive to proactive performance management at scale.

Benefits

- **Automated Insight Generation:** Synthesized structured analytics and unstructured feedback processing to deliver actionable coaching insights without manual effort.
- **Intelligent Data Routing:** Uses a multi-agent Framework to seamlessly route queries to the relevant agent service, optimizing performance and accuracy.
- **Architecture Beyond Product Limitations:** Overcomes technology products’ native routing limitations between structured and unstructured data flows, our solution enables query handling across both data types in a single user query.
- **Scalable Decision Support:** Supports leadership with real-time, scalable insights across teams and regions, enhancing data-driven performance management.

ABOUT BRILLIO

Brillio is a digital technology services company that drives AI-first engineering and design-led experiences for global enterprises. Born digital in 2014, its consulting-led services span Customer Experience, Data & AI, Product Engineering, and Digital Infrastructure. With an industry-leading NPS of 71, Brillio accelerates time to market through its proprietary BrillioOne.ai platform, powered by AI-ready talent with deep domain expertise.

Brillio is the official Digital Transformation Partner and the official Data and AI Services Provider of Atlassian Williams Racing. Brillio partners with leading technology providers including Microsoft, AWS, Google Cloud, Salesforce, Adobe, Databricks, and Snowflake and operates with 6,000+ “Brillians” across 15 global delivery centers. Consistently recognized as a Great Place to Work® since 2021, Brillio blends innovation, talent, and purpose to deliver measurable outcomes for clients and fulfilling careers for employees.



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