

Problem Statement Document



Streamlining B2B Sales Intelligence using Snowflake Cortex AI

Problem Statement:

In the current B2B software landscape, sales teams—including representatives, managers, and revenue operations—rely on vast amounts of data to make data-driven decisions. This data is typically split into two distinct categories: structured quantitative metrics (such as deal values, win rates, and sales stages) and unstructured qualitative insights (such as call transcripts and customer discovery conversations).

The Problem Current methods of data analysis present several critical bottlenecks:

- Data Fragmentation: Quantitative and qualitative data often live in separate silos, making it difficult to answer hybrid questions, such as why sales are declining in a specific quarter despite high deal volume.
- Technical Barriers: Accessing this information traditionally requires manual SQL queries and technical expertise, forcing non-technical stakeholders to wait for data analysts to export CSVs or generate reports.
- Inefficiency and Cost: Manually searching through hundreds of call transcripts or calculating ad-hoc metrics wastes significant time, effort, and money.
- Lack of Actionable Insight: Standard data tools often provide "raw data" rather than concise, actionable insights tailored to the specific needs of a sales persona.

Project Objective

The goal of this project is to design and deploy a production-grade Sales Intelligence Agent within the Snowflake ecosystem. This autonomous system must:

1. **Bridge Data Silos:** Use Cortex Analyst for structured metrics and Cortex Search for unstructured conversational data to provide holistic answers.

2. **Enable Natural Language Interaction:** Allow stakeholders to query complex data using plain human language, eliminating the need for manual SQL coding by end-users.
3. **Ensure Accuracy and Trust:** Utilize Semantic Views and advanced Orchestration Instructions to prevent hallucinations, enforce "Human in the Loop" validation, and provide verifiable citations for every answer.
4. **External Accessibility:** Deploy the agent via the Model Context Protocol (MCP) so that it can be accessed directly within developer tools like Cursor or VS Code without requiring a login to the Snowflake interface.

Impact By automating these routine tasks, the agent saves time and provides real-time, high-quality search capabilities that allow sales teams to focus on closing deals rather than manual data retrieval.