About Evergreen

Evergreen is a nationwide distributor and retailer with a mobile sales force that needed faster, more flexible access to sales and client data. Partnering with RTS Labs, they implemented a conversational AI platform that empowers reps with real-time insights anywhere, transforming how they engage with clients.

- Conversational AI chatbot connected to their reporting database
- Instant answers to client revenue, product trends, and order data
- Smarter, faster sales conversations

The Challenge

DASHBOARDS SLOWED REPS DOWN
Power BI was effective but too heavy to use in the moment

REPORTS LACKED FLEXIBILITY
Canned views answered only predefined questions, leaving reps unprepared when clients asked something new

TIME AND COMPLEXITY HURT AGILITY
Getting deeper answers often meant waiting for analysts or stringing together multiple steps

The Solution

Plain-language Q&A
Reps type, "What are my top five accounts this quarter?" and get an instant answer.

AI-powered queries
Natural language is translated into optimized SQL queries, with full awareness of the database schema.

Smart Shortcuts
A library of common sales requests makes frequent queries even faster.

Visual clarity
Results come back in easy-to-read charts and tables, mobile-ready for reps in the field.

Enterprise-grade security
Integrated with SSO and role-based rules, ensuring reps only see their accounts.

Client extension
After internal success, the chatbot was extended to customers for self-service order checks and product recommendations.

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The Impact

FASTER INSIGHTS
Sales reps now get answers instantly, cutting delays from minutes or hours down to seconds

EMPOWERED REPS ON THE ROAD
Data is accessible anywhere, enabling more informed, confident client conversations

SMARTER SELLING
Reps focus less on hunting for data and more on building relationships and closing deals

EXTRA CLIENT VALUE
Customers now self-serve for orders and product recommendations, improving satisfaction and reducing support load

How Can RTS Help You?

Let's start the conversation and find out!

https://rtslabs.com/contact

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