

Sales Copilot

AI-powered account intelligence: delivered where sellers work.

The HG Insights Sales Copilot is an AI-driven sales intelligence tool within the Revenue Growth Intelligence (RGI) Platform that automates account research, surfaces real-time buying signals, and delivers actionable playbooks. It does this directly inside Salesforce and your web browser via a Chrome extension.

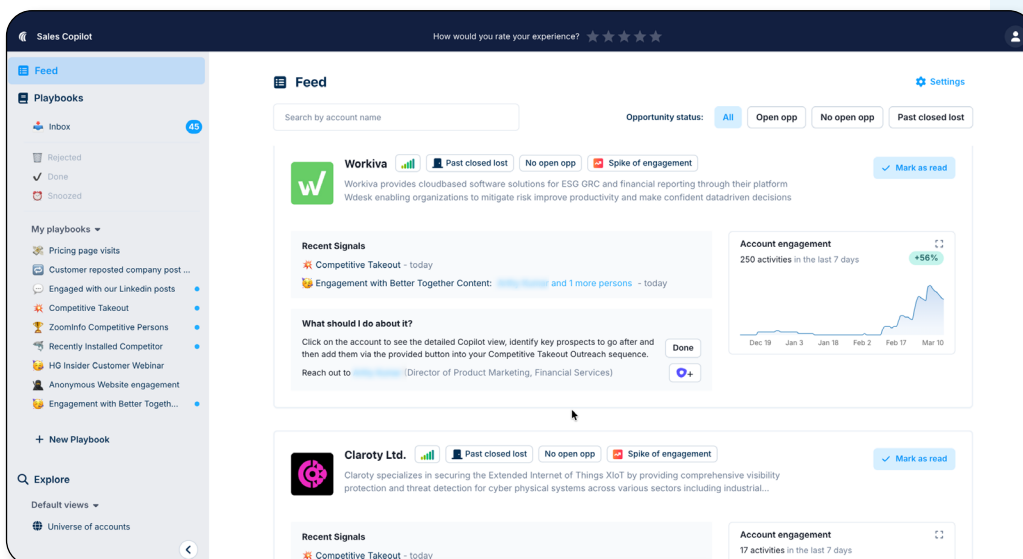
Instead of spending hours manually researching accounts or relying on gut instinct to prioritize outreach, Sales Copilot unifies your CRM data with HG Insights' RGI Fabric, which includes firmographics, technographics, IT spend, competitive intelligence, and buyer intent signals — to tell every rep who to call, what to say, and when.

Key differentiators

- **AI account research and briefs:** Auto-generated account briefs compiling HG market data, CRM data, buyer intent, and product usage — saving valuable meeting prep and outreach time.
- **Signal-based playbooks:** Turn buyer signals into defined tasks, emails, and call prompts so reps consistently execute best-practice motions instead of improvising.
- **Chrome extension and CRM integration:** Account intelligence, scores, and intent alerts surface directly inside Salesforce and your web browser. Reps never leave their workflow.
- **First-party data integration:** Integrates CRM opportunity data, contact engagement, and account history with deep HG RGI Fabric intelligence via Salesforce integration.

Designed for B2B sales teams who need:

- ✓ Reduce hours spent on manual account research before every meeting
- ✓ Prioritize accounts using verified buying signals rather than assumptions
- ✓ Get AI-generated account briefs combining market and CRM data
- ✓ Translate buyer intent signals into structured playbooks with clear next steps
- ✓ Deliver competitive intelligence and relevant talking points at the moment of engagement



Purpose-built for strategic GTM roles

Account Executives

Access AI-generated account briefs, competitive talking points, and prioritized next steps for every account in your pipeline.

Sales Development Reps

Prioritize outbound prospecting using verified buying signals, such as website engagement, product activity, pricing page views, and hiring trends.

Customer Success Teams

Identify expansion and renewal opportunities by tracking technology changes, intent signals, and buying committee activity within existing accounts.

Sales Managers

Equip your team with consistent, data-driven playbooks and gain visibility into which accounts show the strongest buying signals for pipeline reviews and coaching.

Key capabilities at a glance

Capability	Description
AI account briefs	Comprehensive account profiles including technology stack, estimated spend capacity, competitive landscape, and organizational context.
Buyer signal aggregation	Aggregates web, product, content, and review signals into a unified view of buyer readiness.
Active playbooks	Signal-based playbooks that turn buying signals into defined tasks, emails, and call prompts for sellers.
Chrome extension	Receive alerts when accounts show buying intent with clear context, directly in your browser and Salesforce.
Real-time buyer intent alerts	Alerts when accounts and buyers show buying intent, with contextual insights explaining urgency and relevance.
Account and contact intelligence	Equip SDRs, AEs, and CSMs with prioritized accounts, key contacts, and role-based insights for every interaction.

The HG Insights advantage

95% of Fortune 1000 B2B tech companies rely on HG Insights

Sales intelligence is only as effective as the data that powers it. HG Insights' RGI Fabric delivers deep, granular, and trustworthy account and buyer signals — firmographics, technographics, spend, competitive data, and intent — that CRM enrichment tools, generic intent providers, and manual research simply can't compete with.

Ready to help your reps book 2x more meetings?

Visit www.hginsights.com or speak with your HG Insights representative today.

Contact Us: sales@hginsights.com