Insight AI

CLIENT STORY

Accelerating Case Study Creation With AI Powered Aura 2.0



Business and Productivity Software

Story Snapshot

Insight AI needed a faster, more reliable way to turn project delivery knowledge into high-quality case studies, which are critical for sales teams to demonstrate proven expertise and win new business. The existing manual process placed a heavy burden on teams, consuming months of effort. It began with sending a questionnaire to a Delivery Lead, who would spend weeks gathering the necessary information before returning it. Marketing would then take over: copywriting, editing, and coordinating design - a strenuous, end-to-end process that left little room for speed or scale.

To solve this, Insight AI created Aura 2.0, an internal AI-powered knowledge platform. Now, when a project completes, the Delivery Lead automatically receives a prompt to fill out a structured questionnaire. That input is fed directly into Aura 2.0, which generates a polished case study draft – helping teams produce content up to 10x faster. Built on a strong data and governance foundation, Aura 2.0 is also expanding to include a chatbot for querying clients, projects, and technologies, as well as grouped, whole-industry case studies drawn from multiple engagements.

The Challenge

Case studies are critical proof points in services sales, but their value depends on availability and relevance. When content creation is slow, opportunities are missed. Insight AI was producing case studies reactively, meaning teams often had to go into client conversations without the right supporting material, or invest time sourcing and adapting what existed.

The deeper issue was structural. Project knowledge lived with Delivery Leads, but capturing and converting it into usable content had no automation, no triggers, and no consistency - meaning by the time content was ready, the opportunity to use it had often already passed.

This became even more acute as Insight AI pursued international growth. Without a scalable way to translate case studies for different markets, teams had to rely on generic materials or invest yet more manual effort. And with no way to draw on multiple projects at once, sales teams were limited to single-engagement proof points — rarely enough to win complex, high-value deals.





The Solution

Insight AI designed and built Aura 2.0 as a secure internal knowledge platform that captures project knowledge once and makes it reusable across sales, marketing, and delivery teams. Delivery Leads complete structured project questionnaires, and Aura 2.0 uses Azure AI Foundry-powered GPT capabilities to generate structured case study drafts – translated into multiple languages and ready for different markets – helping teams create faster, more consistent, evidence-based content.

Aura 2.0 combines conversational AI, project enrichment, and knowledge retrieval in a single workflow. Users can ask natural-language questions about clients, industries, technologies, timelines, and related case studies, enabling faster access to proof points without manually searching documents or systems.

The platform also supports grouped case studies drawn from multiple projects, allowing sales teams to demonstrate repeatable expertise across a sector – not just a single engagement. Built-in governance, anonymisation-aware handling, and access controls ensure internal knowledge is retrieved and shared responsibly.

Results

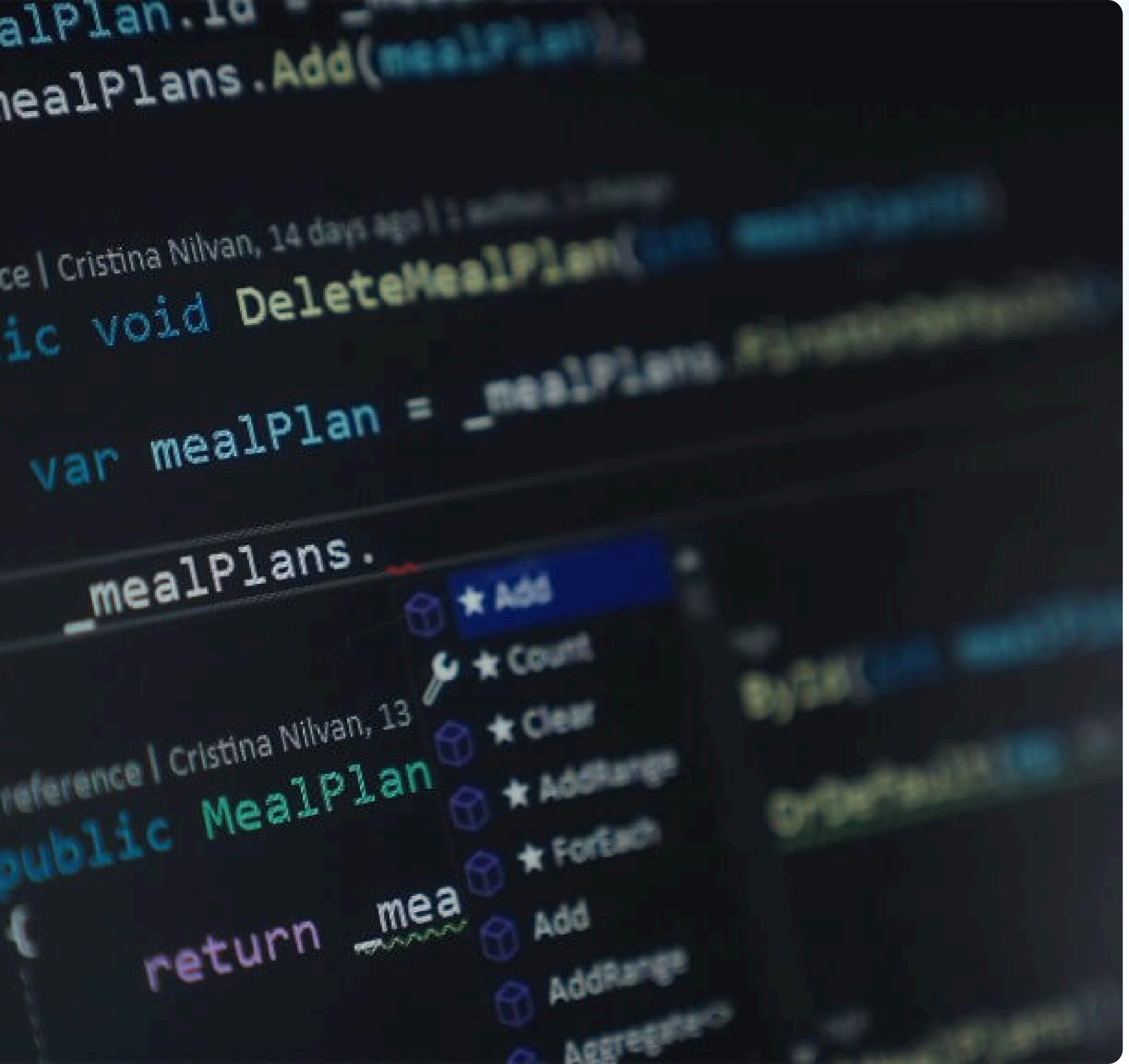
Aura created a more structured and searchable knowledge layer for internal project and client information, reducing reliance on scattered source documents and manual knowledge retrieval. Aura 2.0 delivers **10x faster generation of case studies** compared to the previous manual process.

Teams are now freed from the time-consuming coordination and production cycle, allowing them to focus on strategy and quality rather than chasing information. The application supports the creation of multiple case studies across various projects, strengthening sales enablement and supporting higher close rate ambitions.

As the platform evolves, Aura 2.0 also supports more advanced grouped case study creation - combining evidence from multiple relevant projects to produce broader thematic or whole-industry narratives. This means Insight AI can move from describing one successful engagement at a time to showing repeatable expertise across a sector, technology area, or business challenge.

10x

faster generation of a case study compared to the previous manual process



Technical Highlights

· Built with Python 3.12 and FastAPI as a cloud-ready backend for internal AI workflows.

· React + TypeScript front end built with a modular, domain-driven structure for maintainability and scalability.

· Uses Azure OpenAI and LangChain agents to support conversational search, structured case study generation, and multilingual translation.

· Combines vector search and knowledge graph retrieval to improve answer quality and discoverability across projects, industries, technologies, and geographies.

· Integrates with Azure Event Hub and scheduled merge pipelines to keep internal data streams synchronised and continuously enrich the knowledge base.

· Enforces enterprise controls through Azure AD authentication, role-based access patterns, anonymisation-aware handling, and PII/output guardrails.

· Deployed through Azure infrastructure as code using Bicep, with supporting services including Cosmos DB, Blob Storage, Key Vault, Container Apps, and Application Insights.

· Application Insights integration for usage visibility and operational monitoring.



Why Insight AI?

We were chosen to build Aura 2.0 because we could design and deliver a fully bespoke application that aligned with our internal sales enablement needs.

Our strength was in designing a bespoke solution around the way our teams work. Aura brings together AI chat, structured case study generation, project metadata, survey-derived knowledge, vector search, and graph-based retrieval, allowing users to move from fragmented internal information to usable answers and case study content much more efficiently.

We also built the platform with the right operational and governance foundations. By using Azure-native services, authentication through Azure AD, anonymisation-aware logic, and output guardrails, we ensured that the solution was not only useful, but also appropriate for handling internal business knowledge responsibly.

Our understanding of how case studies support complex services sales allowed us to create a tool that directly empowers our sales teams to focus on closing deals.

Insight AI

Thank you for reading

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