



Squirro & Salesforce Together

Squirro FCD for Salesforce Sales Team



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Why is data the most valuable asset?

The financial services industry invests **US \$33.2** billions every year in the same data that each firm uses for making competitive business decision.

[Source: Burton-Taylor / TP-ICAP Data & Analytics report](#)

Squirro helps customers to increase ROI:

Candriam, Standard Chartered, Armacell will tell you how Squirro helped them to

- generate 11% more opportunities
- add 3% to their top line
- achieve their company's commercial goals



Meet Squirro

Company

Swiss software company

Offices: Zurich (HQ), London, New York, Singapore

Industries: FS, MFG

Solution

Provides **Augmented Intelligence** solutions

Specialised in full text analytics, natural language processing and machine learning



Investors



Squirro Reference Customers



Leading Analyst & Market Recognition



Gartner Magic Quadrant 2021 for Insights Engines: 'Squirro named a Visionary company'

[Get your free copy of the report here](#)



Forrester Wave for Cognitive Search 2019: 'Squirro named a Strong Performer'



Winner of the Start-Up challenge
[Watch the session here](#)



- Big Innovation AI Excellence Award
 - The Asset Triple A Digital Award for "Client Insights."
 - Standard Chartered Bank Win 2021
- [Read the press release here](#)



Winner of the Hackathon challenge
[More details here](#)



Customer success stories



Get everyone excited about using Salesforce all day long

+5% increase in cross- and up-sell opportunities

AI Solution



Almost 5,000 bankers across global locations up- and cross-sell with Squirro's AI-generated recommendations from multiple internal and external data sources.

Added revenues exceeded investment in less than 6 months

Decision Intelligence



With Morningstar data into Salesforce, Squirro originates deals, alerts on risks, reduces meeting preparation time, provides customer sentiment and monitors peers' activity.

Two hours work saved daily, \$1m salary costs saved yearly

Insights Cockpit



Processing all internal and external data sources, Squirro offloads manual work for all underwriters, streamlining risk assessment and the preparation of all policies and renewals.

Skyrocketed efficiency and improved risk evaluation



BANK OF ENGLAND

Insights Engine

1,500 supervisors at the Prudential Regulation Authority of the Bank of England use Squirro Cognitive Search as their core workbench for assessing risks across the banking sector.



What problems does Squirro solve?

Increase your data and technology ROI with a system of insight



Time wasted searching data preparing for calls

Late in engaging customers and without the right information

Missed revenue opportunities

✓
Integrate any Data Source
within Salesforce

✓
Enhance Einstein and
Tableau with NLP and ML

✓
Automate Research,
Recommendations, and Meeting
Preparation

Enable Revenue Growth
and Data ROI



Increase Productivity
Reduce Service Mgmt Costs

How do customers benefit from Squirro?



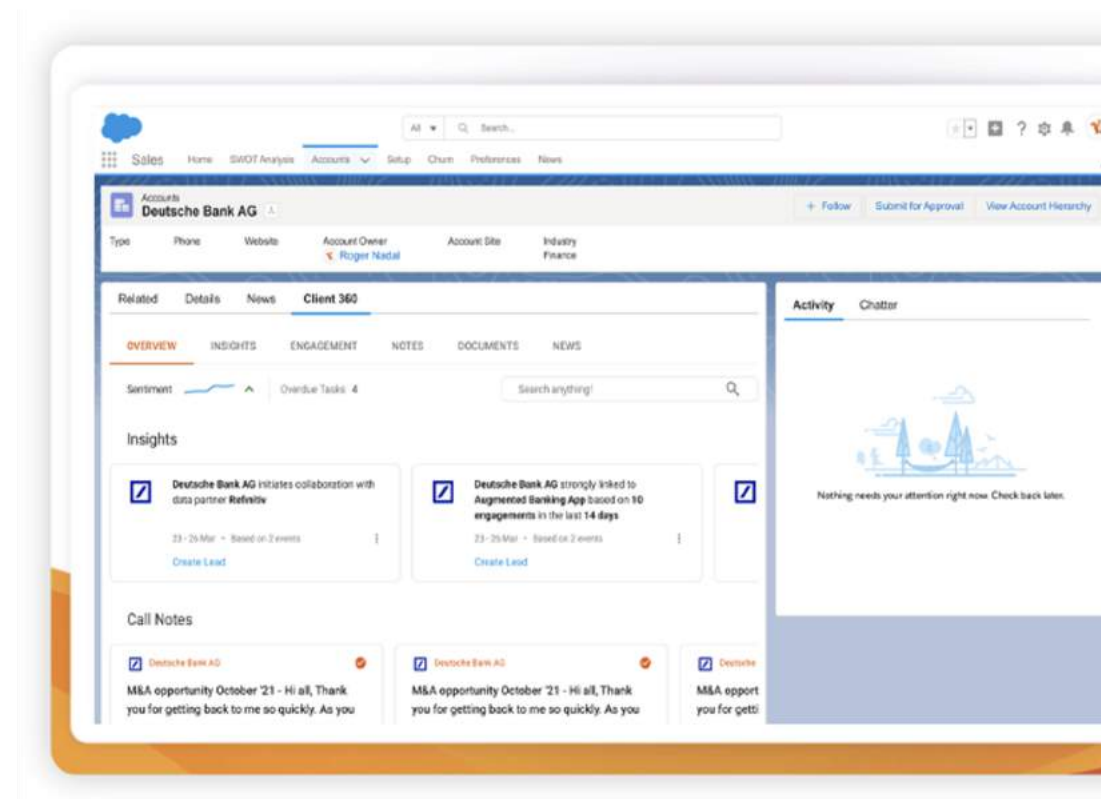
Increase your data and technology ROI with a system of insight

Squirro for Salesforce helps by

- Integrating internal, external, and market data into Salesforce
- Getting the right insights to the right person at the right time - automatically!

Gain: Increased ROI/Productivity/Effectiveness

- Data-driven client engagement, no time wasted!
- Higher CRM usage and organic revenue growth
- Minimised meeting preparation time



Generate deal ideas and talking points

Squirro and Salesforce Analytics



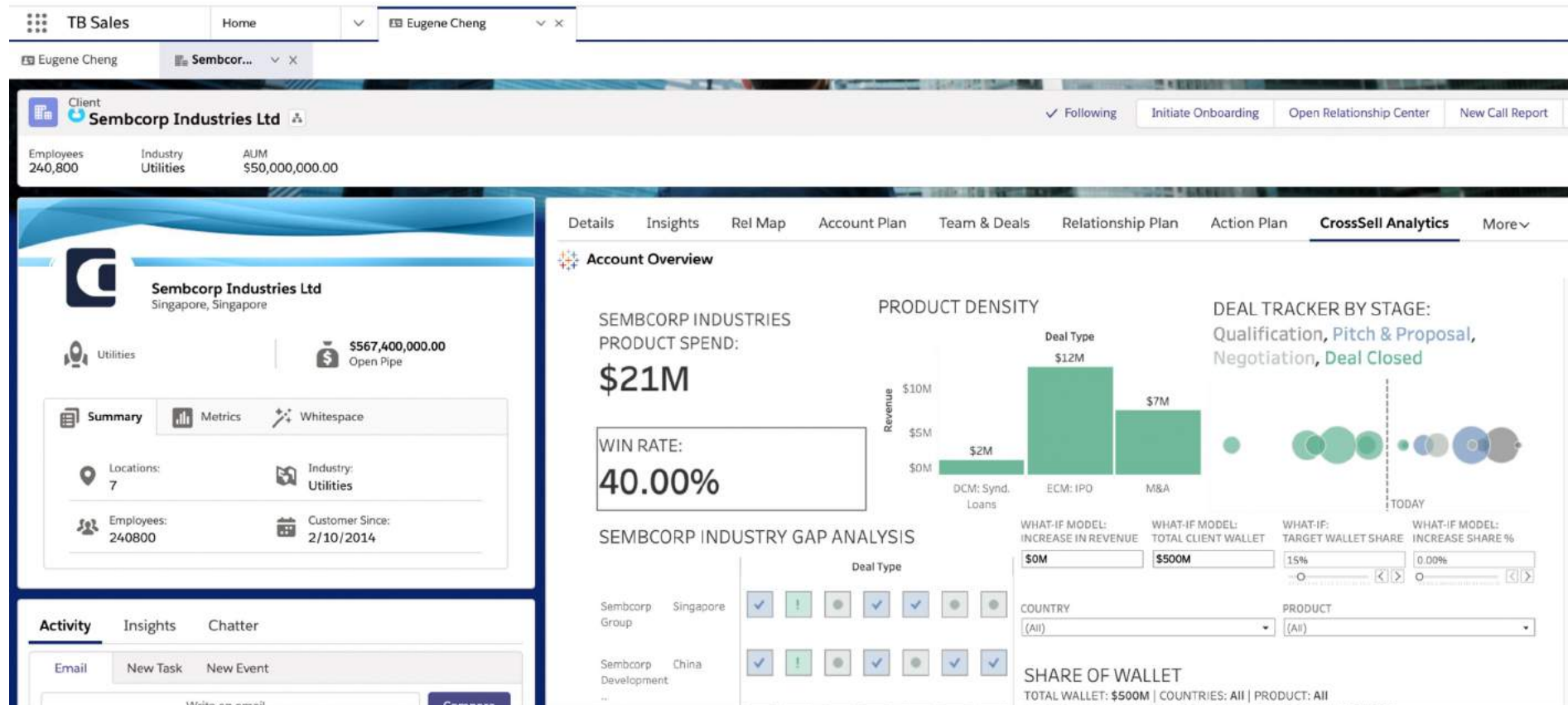
A screenshot of the Squirro application interface integrated with Salesforce. The top navigation bar shows "TB Sales", "Home", and a user profile for "Eugene Cheng". Below this, a client profile for "Sembcorp Industries Ltd" is displayed, including details like "Employees: 240,800", "Industry: Utilities", and "AUM: \$50,000,000.00". The main content area is divided into two panels. The left panel shows a summary of the client's profile, including "Locations: 7", "Employees: 240800", and "Customer Since: 2/10/2014". The right panel, titled "Insights", shows a search bar and a list of results. The first result is "In the News" with the headline "BRIEF-Sembcorp Industries Announce Appointment Of Tow Heng Tan As A Director", dated "June 1, 2021 03:38". Below this is a "Board Change" event. The second result is a "Call Report" dated "May 25, 2021 10:00". Two callout boxes on the right side of the image point to specific features: "Create leads and tasks" points to the "CREATE LEAD" button, and "Event discovery" points to the "Board Change" event.

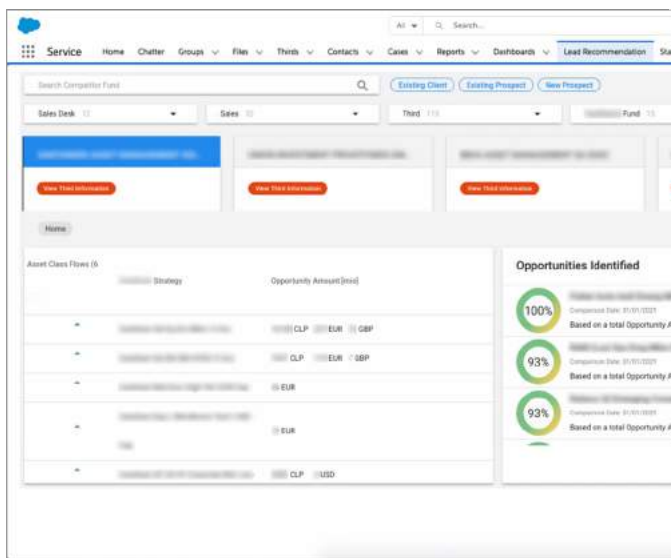
Create leads and tasks

Event discovery

and increase your close rates!

Squirro and Salesforce Analytics





Candriam leverages Squirro to source Deals

CHALLENGE

In a competitive marketplace Candriam needs to make a difference with a focus on opportunities where they outpace the competition. While they have all data available, it's distributed across data silos, difficult to analyse, and left untouched.

SOLUTION

Squirro - directly embedded in Salesforce - helps Candriam source fund opportunities. Squirro provides updated personalized deal recommendations.

The solution includes detailed detailed deal scoring including next best actions.

>1bn
Sourced
deal volume

<9mts
Solution ROI

Integrating data
from: 

Sales



Analytics



Integration



Squirro plays well with Salesforce



	Squirro	Tableau	Einstein
Analytics*) for structured data			
Analytics for unstructured data			
Insights**) based on structured data			
Insights based on unstructured data			
Insights based on 3rd party unstructured data not stored in SF			
Enterprise Cognitive Search in SFDC			

*)Analytics: Visualisations from the systematic analysis of data or statistics

**) Insights: An accurate and deep understanding of an event

Note
Einstein is a broad family of Salesforce AI products. The comparison here relates to the out-of-the-box features in the Salesforce Sales & Service Cloud offering.



Requirement fully met



Requirement partly met



Requirement weakly/not met



Reference Customers Across Industries



Financial Services and Manufacturing industry predominantly





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Competitive Analysis - USPs Overview



	Squirro	Elastic	Coveo	Mindbreeze	Thoughtspot
Integration to Salesforce					
Industry and Use Case specific Apps					
NLP-driven Recommendations					
100+ Data Connectors and Pre-Trained ML Models for FS					
No-code interface to build your own ML models					
Extensible Enrich & Classify Pipeline					



Requirement
fully met



Requirement
partly met



Requirement
weakly/not met