



Sales Insights for Everyone

Opportunity Sourcing – Case Study

Uncover Insights with AI-Apps from Squirro



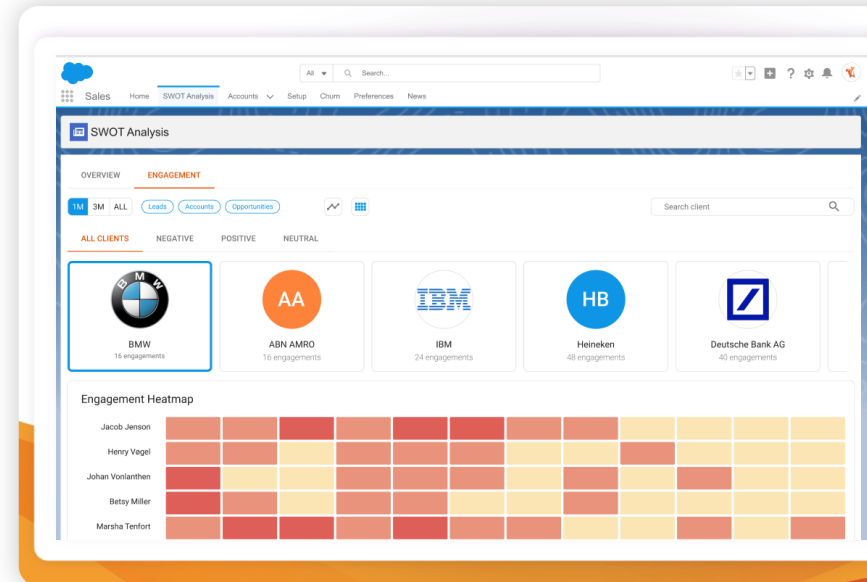
Squirro Sales Insights

Solution

- Real-time customer insights to understand easily & effectively what customers really want
- A 360° view based on internal & external data delivering real-time engagement insights
- Insights delivered within existing workflows, workbench & CRM systems

Impact

- A competitive edge to increase customer satisfaction, reduce churn & increase close rates
- 15% increase in customer satisfaction
- 3% positive revenue impact



360° Insights

Challenge

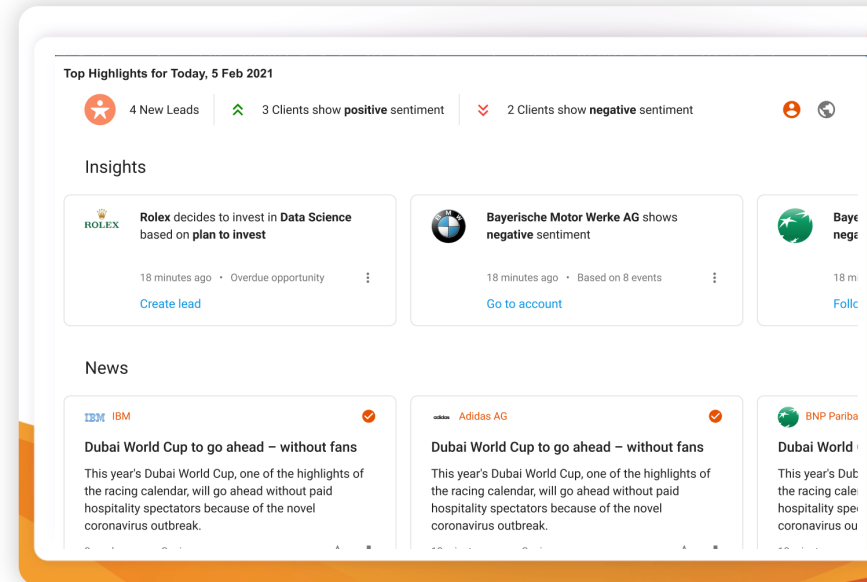
- Siloed data, no complete client interaction view
- No understanding of client relationship quality

Solution

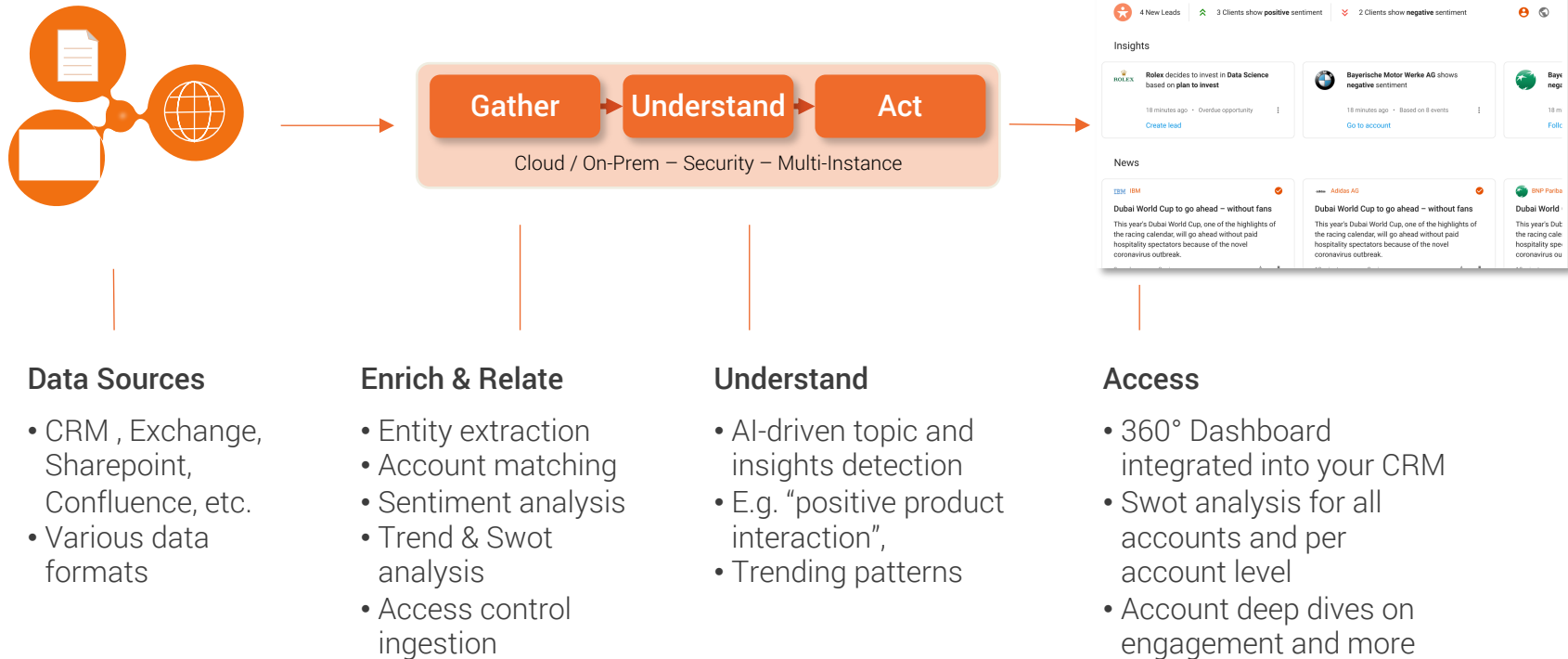
- Full 360° & SWOT views for every client
- Full interaction & quality of relationship analysis

Benefits

- Deeper and more intimate customer insights
- Purposeful pro-active client interactions



Logical Setup



360° Dashboard

Top Highlights

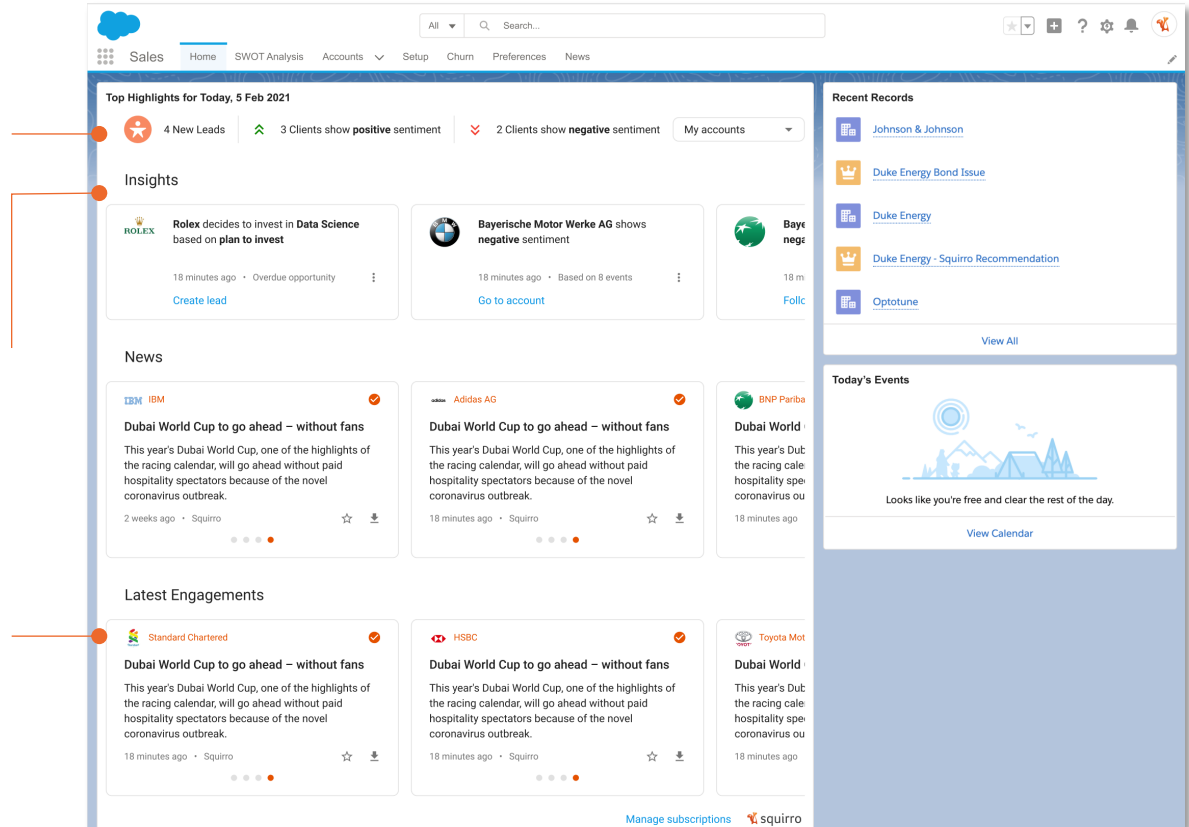
Key elements to act on: open leads, positive or negative engagement levels

Insights

Key Insights on your leads and accounts including next best action recommendations

Updates

Keep informed about the latest news, client engagements with data from outside your CRM



SWOT Analysis

Overview

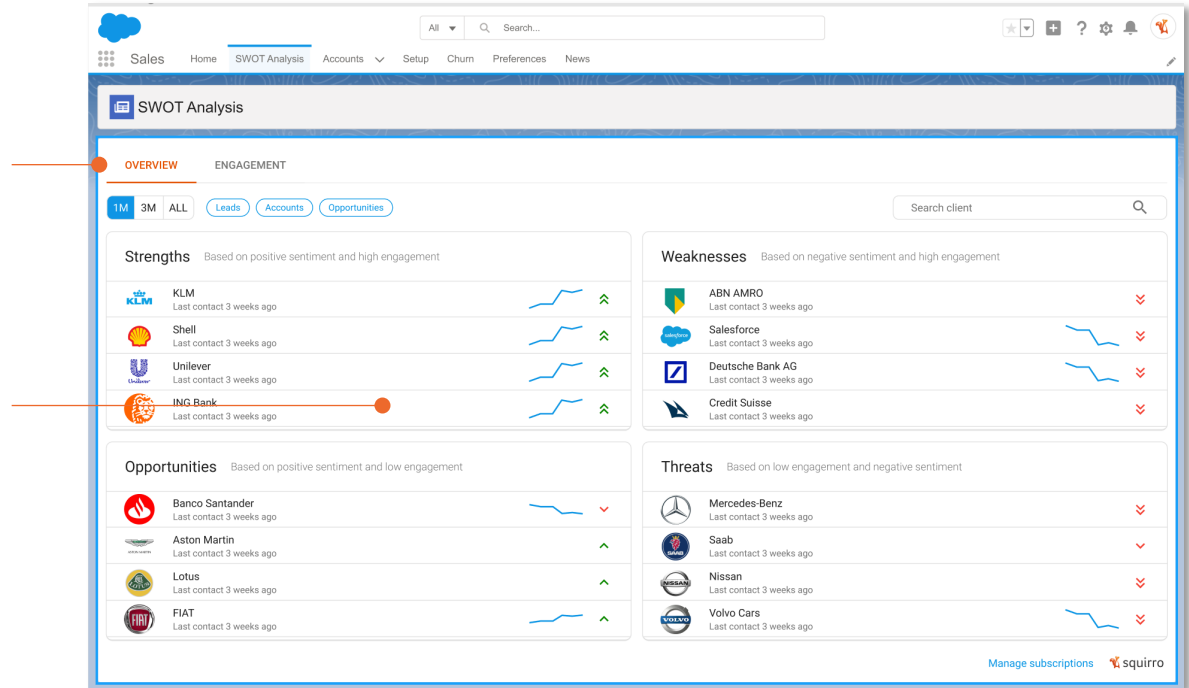
Get a quick overview of the health of your leads, accounts and opportunities

SWOT

SWOT analysis of all accounts

Trend analysis over last 30, 90, 180 days

See how interactions and their sentiment between your company and your prospect or client develop over time



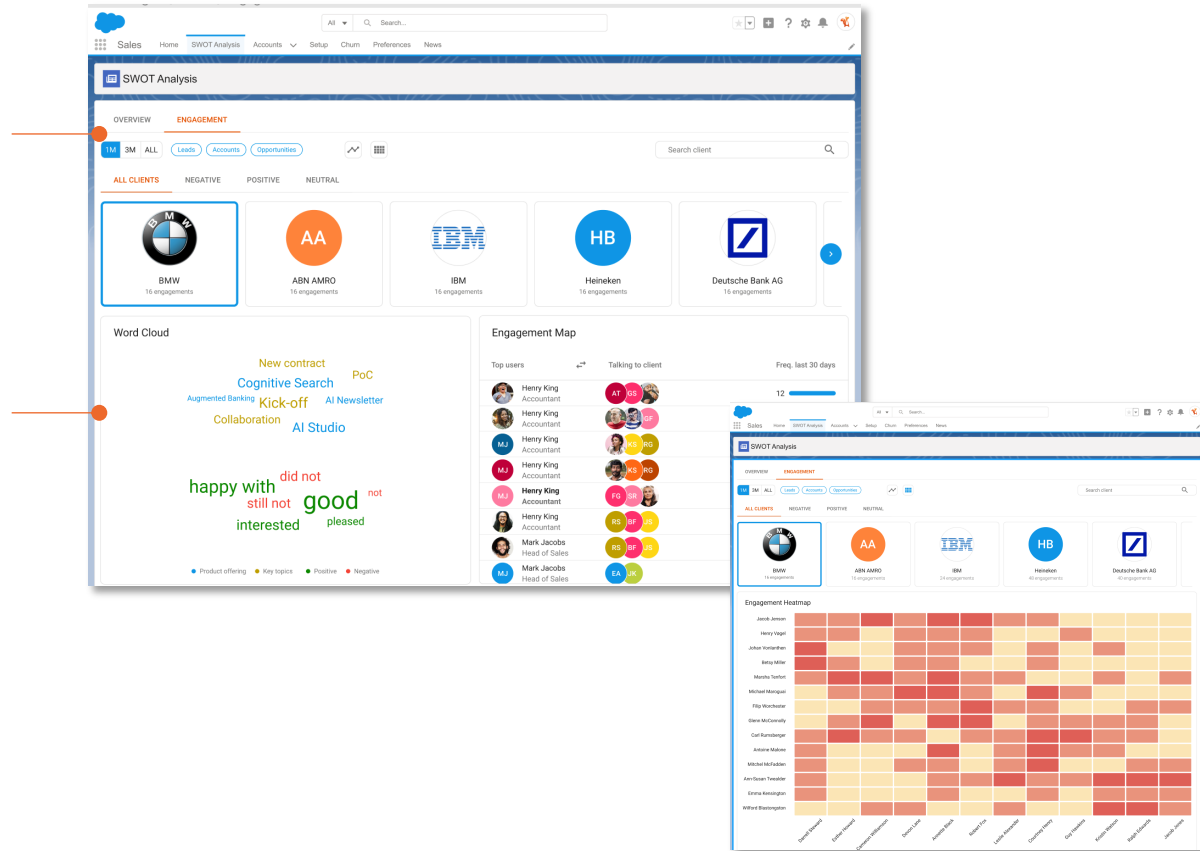
Engagement Analysis

Deep Dive

For each lead, account, opportunity get a deep dive on different dimensions

Analysis

Get a view on 'who talks to whom', about what, with what intent



Client 360

Client 360° View

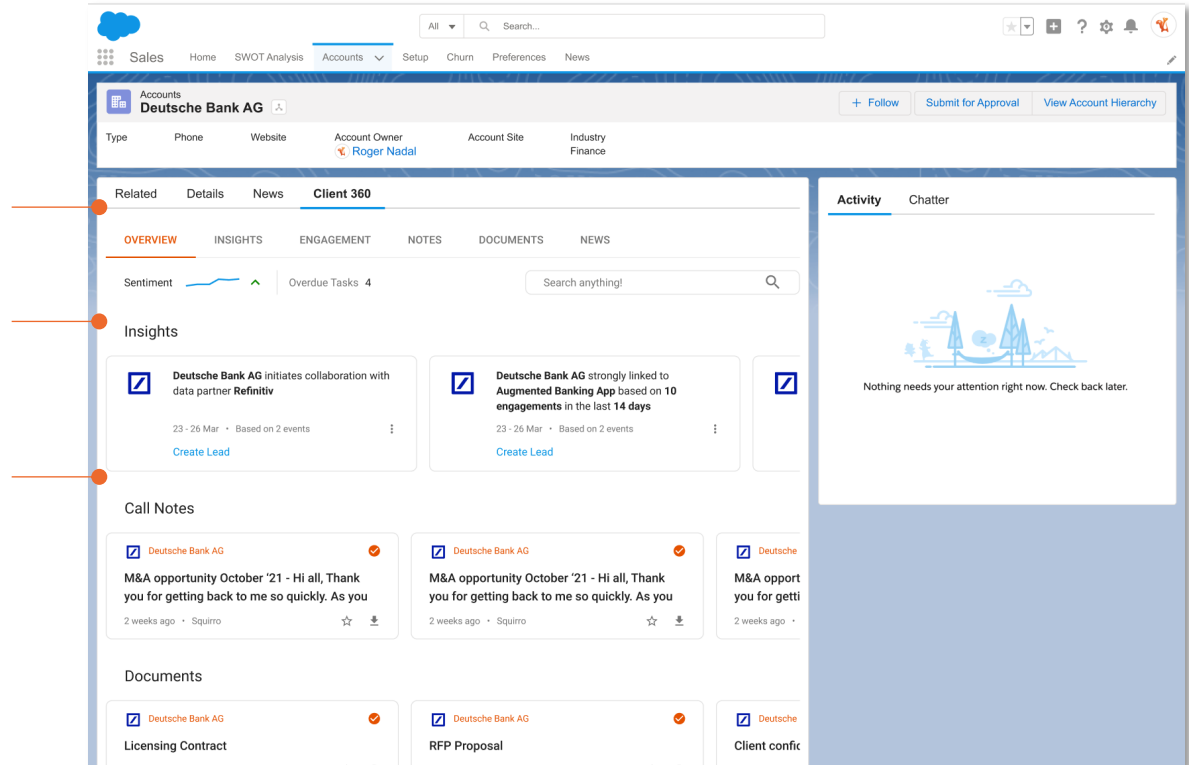
360° cockpit view including top highlights: Sentiment, Engagement, open tasks

Insights

Key Insights on your account with suggested next best actions

Updates

Updates on latest documents notes & news based on data from outside your CRM



Insights explained

The 'Why behind the Insight'

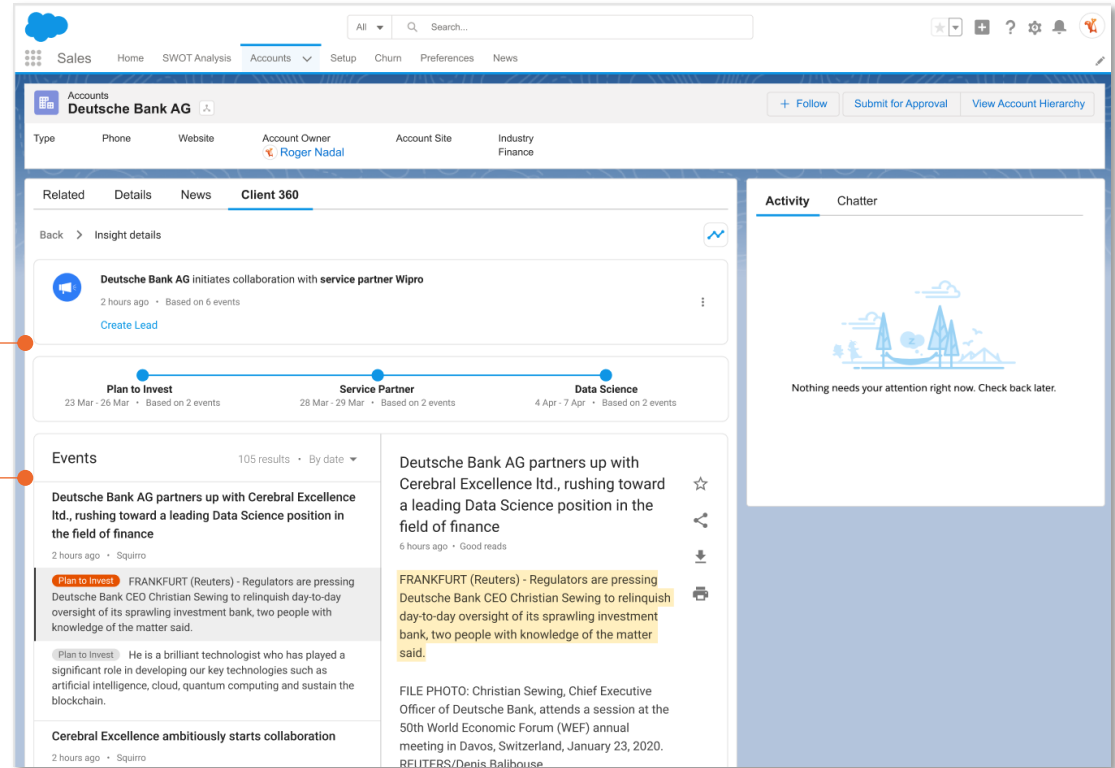
Understand why Squirro made an insightful recommendation

Timeline

See how Squirro has identified key events leading to that insight

Events

Read about each event to get an understanding what happened in the marketplace



The screenshot displays the Squirro Accounts interface for Deutsche Bank AG. The interface includes a navigation bar at the top with options like Sales, Home, SWOT Analysis, Accounts, Setup, Churn, Preferences, and News. Below this, the account details for Deutsche Bank AG are shown, including the account owner Roger Nadal. The main section is divided into tabs: Related, Details, News, and Client 360. The Client 360 tab is active, showing a timeline of events. The timeline includes three key events: 'Deutsche Bank AG initiates collaboration with service partner Wipro' (2 hours ago), 'Plan to Invest' (23 Mar - 26 Mar), and 'Service Partner' (28 Mar - 29 Mar). Below the timeline, there is a section for 'Events' with 105 results. The first event is 'Deutsche Bank AG partners up with Cerebral Excellence Ltd., rushing toward a leading Data Science position in the field of finance' (2 hours ago). The second event is 'Deutsche Bank AG partners up with Cerebral Excellence Ltd., rushing toward a leading Data Science position in the field of finance' (6 hours ago). The third event is 'Deutsche Bank AG partners up with Cerebral Excellence Ltd., rushing toward a leading Data Science position in the field of finance' (2 hours ago). The interface also includes a sidebar on the right with 'Activity' and 'Chatter' tabs, and a bottom section with a 'Nothing needs your attention right now. Check back later.' message.

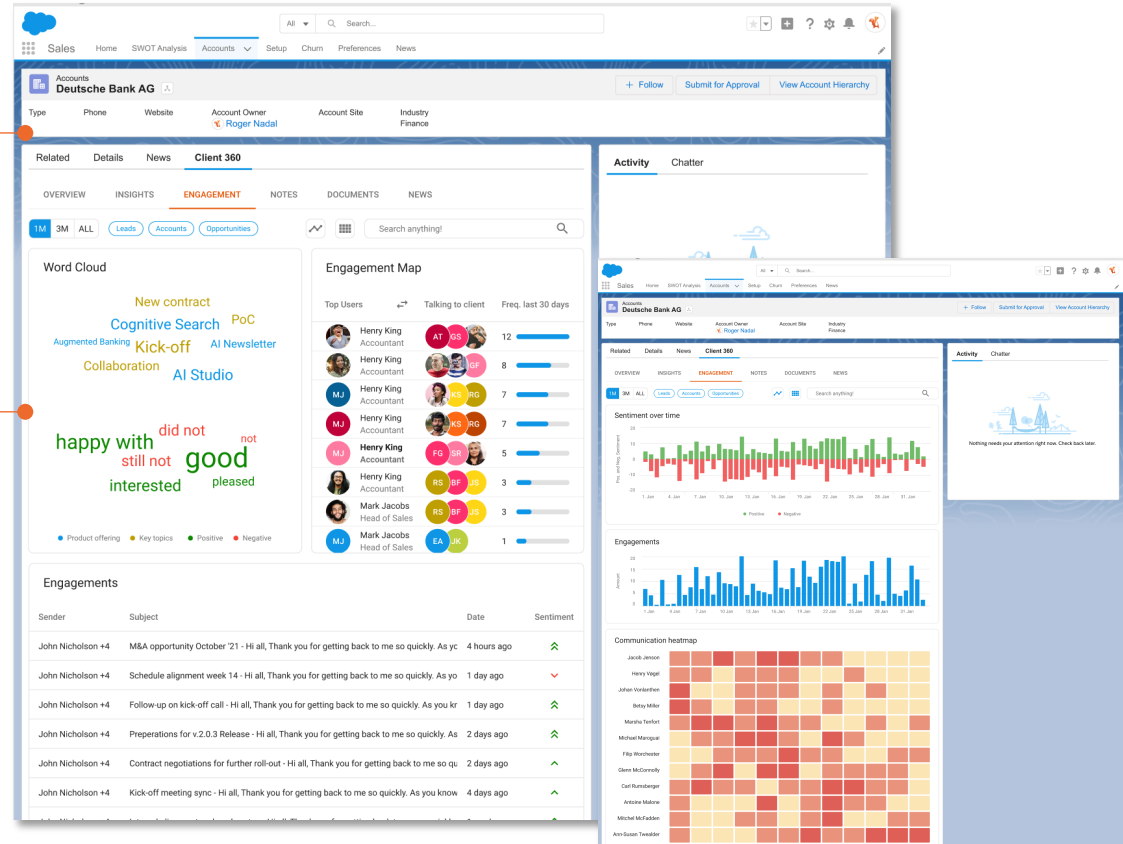
Engagement View

Deep Dive

For the client chosen get a deep dive on different dimensions

Analysis

Get a view on 'who talks to whom', about what, with what intent including sentiment scores



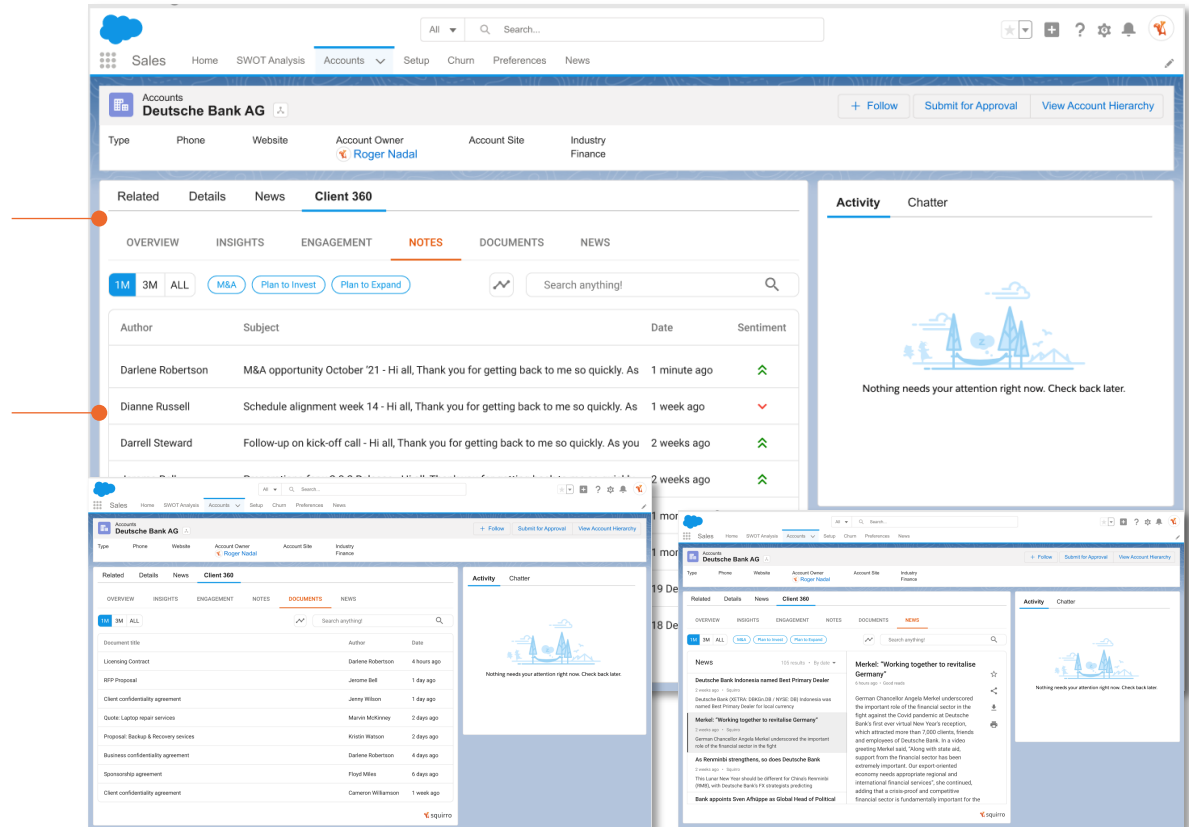
Client Updates

Notes & Emails

A fast overview of the last interactions with your client. This data may come from outside your CRM, e.g. form a shared mailbox

Documents & News

A fast look at document, the latest news on your client; aggregated from various different data sources



The interface displays client updates for Deutsche Bank AG, managed by Roger Nadal. It features a navigation bar with tabs for Sales, Home, SWOT Analysis, Accounts, Setup, Churn, Preferences, and News. The main content area is divided into sections for Related, Details, News, and Client 360. The Client 360 section includes tabs for Overview, Insights, Engagement, Notes, Documents, and News. The Notes tab shows a list of recent communications with columns for Author, Subject, Date, and Sentiment. The Documents tab shows a list of documents with columns for Document Title, Author, and Date. The News tab shows a list of news articles with columns for News Title, Date, and Source.

Author	Subject	Date	Sentiment
Darlene Robertson	M&A opportunity October '21 - Hi all, Thank you for getting back to me so quickly. As	1 minute ago	Up
Dianne Russell	Schedule alignment week 14 - Hi all, Thank you for getting back to me so quickly. As	1 week ago	Down
Darrell Steward	Follow-up on kick-off call - Hi all, Thank you for getting back to me so quickly. As you	2 weeks ago	Up

Document Title	Author	Date
Licensing Contract	Darlene Robertson	4 hours ago
M&A Proposal	Jessica Bell	1 day ago
Client confidentiality agreement	Jenny Wilson	1 day ago
Quote Laptop repair services	Marvin McKinney	2 days ago
Proposal Backup & Recovery services	Kristin Watson	2 days ago
Business confidentiality agreement	Darlene Robertson	4 days ago
Sponsorship agreement	Floyd Miles	6 days ago
Client confidentiality agreement	Cameron Williamson	1 week ago

News

Deutsche Bank Indonesia named Best Primary Dealer
 2 months ago · Reuters
 Deutsche Bank (DB) has been named Best Primary Dealer for its role in the fight against the Covid pandemic at Deutsche Bank's first ever virtual New Year's reception, which attracted more than 1,000 clients, friends and employees of Deutsche Bank. In a video greeting, Michael and, along with state aid support from the financial sector has been extremely important. Our expert-oriented economy needs appropriate regional and international financial services," she continued, adding that a strong and competitive financial sector is fundamentally important for the Bank appoints Sam Alkhalil as Global Head of Political

Merkel: "Working together to revitalise Germany"
 5 hours ago · Reuters
 German Chancellor Angela Merkel underscored the important role of the financial sector in the fight against the Covid pandemic at Deutsche Bank's first ever virtual New Year's reception, which attracted more than 1,000 clients, friends and employees of Deutsche Bank. In a video greeting, Michael and, along with state aid support from the financial sector has been extremely important. Our expert-oriented economy needs appropriate regional and international financial services," she continued, adding that a strong and competitive financial sector is fundamentally important for the

Quick Facts – Sales Insights

Highlights

- Highlights
- Automated in-context information
- Unified 360° customer view (enterprise and external content)
- Engagement & SWOT analysis including sentiment
- Insight with actionable recommendations
- Automated monitoring & alerting
- Real-time integration in CRM / ERP

Available Data Dimensions (extract)

- Panoptic client view
- SWOT & Engagement Views
- Insights View
- Financials & Financial Performance
- Organizational structure
- Industry & Market News
- Personnel changes
- Products & Services
- Internal data

Delivery

- Cloud delivery
 - Amazon Web Services
 - Microsoft Azure
 - Private clouds on request
- On-Premise
 - RHEL / CentOS

CRM / BI Integrations

- Salesforce
- Microsoft Dynamics
- Qlik & Tableau
- Other CRMs / applications based on custom integration

Security

- Single-sign-on integration
- Full access control
- SSL encryption
- Component segmentation



Thank You

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