

## Cross-functional data analytics for an American Tier1 Bank

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Why did an American bank  
engage a Swiss startup



## Turn meaningless data into valuable insights

95 % of all data is never touched beyond primary use

Changing the cost vs. value equation of data is essential

Squirro is a software application, which turns data into insights



Gartner, IDC

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### Squirro solutions



Service insights



Customer insights



Risk insights

#### Benefit

- Improves service levels
- Identifies similar tickets, quality checks, problem analysis, automate ticket routing & assignment

#### Result

- Productivity gains through cost reduction, (\$2M savings @ Telco Service Center)

#### Benefit

- Displays insightful information per account to CRM users, such as 'competitive information', 'client engagement', '...'

#### Result

- Positive revenue impact - +3% @ Asset Manager

#### Benefit

- Assists with real-time concept based fraud detection within, E.g. Email, IM, call notes, reports, ..

#### Result

- Better fraud monitoring on additional dimensions

## Changing the value of data

95 % of all data is never touched beyond primary use  
Squirro provides a simplified solution to get value from all your data



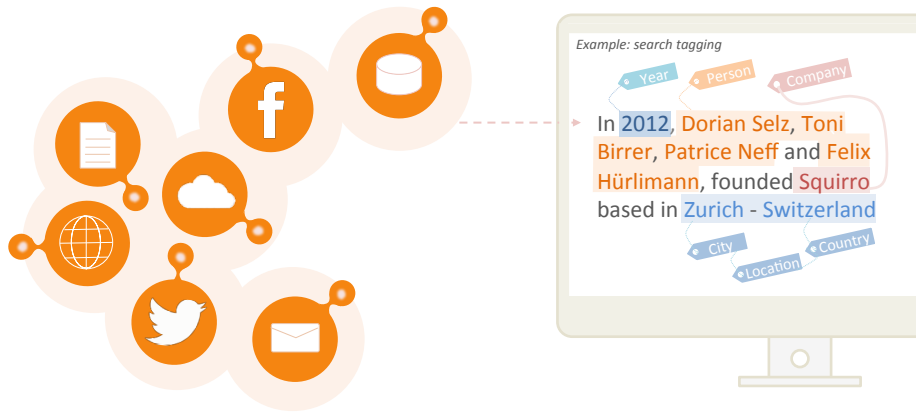
## Insights derived from structured data

Business intelligence software provides insights to structured data when its organised through tables & field names, defining associations & hierarchies.



## Insights from unstructured data

Unstructured data is irregular and therefore harder for software to deal with  
Squirro combines and enriches data to add structure to unstructured data

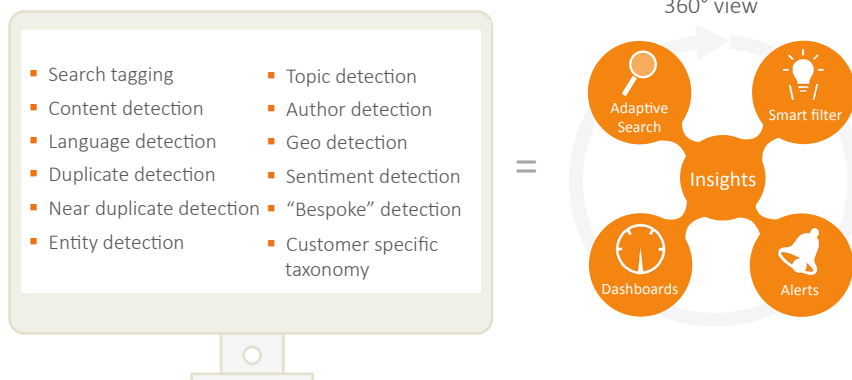


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## Squirro Enrichment Features

The flexible and adaptive enrichment pipeline enables a 360° view.



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## The Case



## Empower 10,000 Relationship Managers to engage insightfully with customers

American multinational banking and financial services holding company

### Problem

- Siloed data in 12+ CRMs
- Not able to get a single view of CRM

### Solution

- Connected disparate systems across 20 lines of business
- Key account teams get an unified client view in real time
- Insights on client issues, product performance, state of customer relationships, etc.
- Result: 22% return on data

The screenshot displays the Squirrel CRM interface for a specific account, 'Relationship 1055'. It includes sections for 'Account Detail', 'Squirrel Stream', and 'Squirrel Analytics'. The 'Squirrel Analytics' section features a table for 'Line of Business' and 'Attendees'.

Line of Business	#	%
Top 1 values		
CnBG	69	100%

Attendees	#	%
Barbara	69	100%
Joe	57	83%
Robert	30	43%
Deirdre	26	38%

salesforce.com 15 Search... Linda Cascardo Setup Help Sales

Home Team Interactions Chatter Accounts

Create New... Search Overview Interactions 6m | 1y | 18m | 2x | 3x | max (Disable ACL)

**Recent Items**

- Relationship 1055
- Relationship 1093
- Relationship 1000
- Relationship 583
- Linda Cascardo
- United Oil Installations

Recycle Bin

**Customers**

Top 100 values	#	%
Relationship 1055 Customer 1	23	7%
Relationship 591 Customer 1	17	5%
Relationship 706 Customer 1	16	5%
Relationship 583 Customer 1	14	4%

**Attendees**

Top 100 values	#	%
Barbara	81	24%
Paul	76	22%
Jeri	70	21%
Joe	40	12%

**Organizer**

Top 27 values	#	%
Barbara	81	24%
Paul	69	20%
Jeri	59	17%
Cindy	24	7%

**Interactions**

Relationship 1055 Customer 1: Wells Farg...  
8 months ago - Greetings, Please hold this as the third Thursday of each month to host a call between Wells

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Relationship 1055 Customer 1: Wells Farg...  
8 months ago - Monthly treasury call with the Washington Post and Kaplan to discuss treasury initiatives, pipeline

**Interaction Themes**

**Interaction Type**

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Home Team Interactions Chatter Accounts

Create New... Relationship 1055 Customize Page | Edit Layout | Printable View | Help for this Page

Recent Items: Relationship 1055, Relationship 1093, Relationship 1000, Relationship 583, Linda Cascardo, United Oil Installations

Recycle Bin

**Account Detail**

Account Owner: [Change] Rating: [ ]  
 Account Name: Relationship 1055 [New Hierarchy] Phone: [ ]  
 Parent Account: [ ] Ticker Symbol: [ ]

**Squirrel Stream**

**Squirrel Analytics**

Line of Business

Top 1 values	#	%
CmBG	69	100%

**Attendees**

Top 20 values	#	%
Barbara	69	100%
Joe	57	83%
Robert	30	43%
Deirdre	26	38%

**Interactions**

Relationship 1055 Customer 1: Wells Fa...  
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**Volume**

**Interaction Themes**

Annual Planning Service Issues  
Pricing New Account  
Client objectives Introductions

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## Why?

- Market for Search-Based Data Discovery solutions (Gartner speak) is fragmented
- PoC engagement gave the bank the confidence of choosing the right partner
- Securing a competitive advantage in the market
- Enabling the bank to get more done with less



Squirro is a software application, which turns data into relevant business insights.

Built from scratch for the cloud, it provides unified data access and adaptive search to generate actionable insights.

Core to the solution is the patented Smart Filter technology, which intelligently connects seemingly unrelated data points while learning and refining as user interactions increase.

These insights are delivered seamlessly integrated into strategic business applications including ERP's, CRM's and BI's.

Squirro – The Insights Company

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