Help your sales people get organized, manage their prospects and track their sales and customer onboarding more efficiently. Squirrel will optimize your customer acquisition productivity, improve efficiency and increase sales.

We've removed the complexity and expense of automating the sales process. Squirrel delivers:

01
Optimization of your sales management strategy and tactics to significantly boost sales

02
Complete automation of all sales and sales management processes resulting in sustained and predictable sales results

03
Comprehensive customer onboarding features that includes instant account opening with bio metric recognition plus all related document workflow management and archiving

04
Real-time activity, performance tracking, analysis and reports enabling your sales leaders to have timely and effective coaching conversations with their teams

In addition, we provide in-depth training of front line sales staff and sales managers and provide ongoing evaluation and support for sales effectiveness.

Customize & Automate Sales Processes to Integrate your Sales Leadership and Front-line Staff
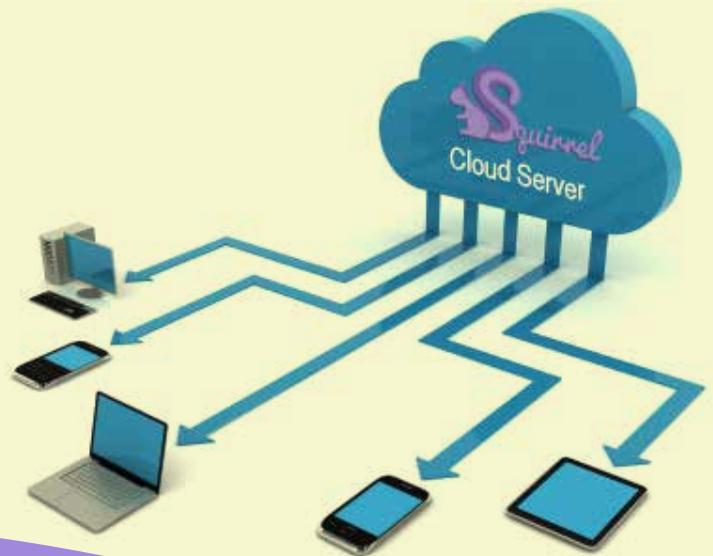
- Use Squirrel to integrate and automate the sales administration and management process across all levels of your organization.

- Live dashboards provide real time sales planning and performance data by sales person, by branch, by city, by region and for the entire bank.

- All reports are fully customizable with daily, weekly, monthly and annual information of performance.

- Squirrel can be purchased on a 'pay-as-you-go' basis and there are no upfront software license fees or annual maintenance contracts to worry about.

- You don't need to make any long-term commitment and you only pay a per user, per month charge as you use the service.
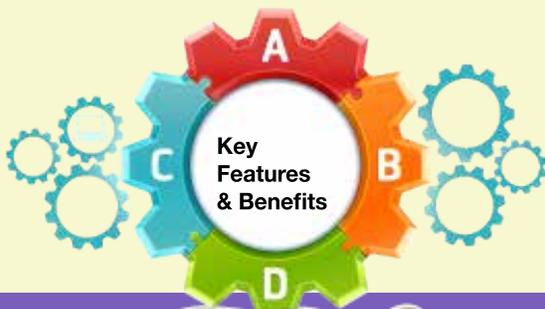
Access Anytime and Anywhere

Squirrel is cloud-based and banks can choose to locate the server within their own firewall.

The service can be accessed on Android devices with our mobile app or any desktop PC empowering your frontline sales staff to maximize their sales closing rate.

workstream *automation*

Key Features & Benefits

Daily Call Planning:
Every sales person is required to publish planned customer meetings for that day. Alerts are triggered to supervisors when this task is not completed by a set time each morning.

Define Purpose Of Each Call:
The sales person needs to record clear objectives for each customer call or meeting

Reschedule Contact:
Sales person is directed to reschedule any planned call not completed

Allocate New Leads:
Squirrel allows allocation of new target customer names resulting from leads created in the call center or from promotional campaigns

Recording Sales Made:
Sales person records what the customer has agreed with expected date of closure and amount of the sale

Fully Automated Customer Onboarding Process
Account opening with automated biometric verification, document signing and scanning of all required support documentation at customer premises

Pipeline Forecast Reminders:
Reminders are sent for follow-up when the customer has expressed interested in purchasing product but the sale has not yet been closed

Tracking Maps:
Actual intra-working-day movement of sales staff via live mapping (optional)

Tracking Results:
View real-time sales achievements vs. targets and incentive compensation

Fully Auditable and Permanent Customer Records:
Adding or editing existing customer information creates permanent bank record (which is not lost if the sales person was to defect to a competing bank)

Maintaining Customer Portfolio:
Automated 'Customer Needs Analysis' to effectively define customer banking needs and match them with appropriate solutions

Real-Time Push Notifications:
Alerts and information pushed to every salesperson instead of having to cascade down through layers of sales management resulting in saved time and improved effectiveness.

Contact us to learn more about how Squirrel can increase your sales:
abbas.iqbal@workstreamautomation.com

We provide in-field coaching and an implementation architecture that transforms a Bank's retail sales culture into a process that empowers the Sales Leadership and the Frontline Sales teams to execute their activities more effectively. We help implement sales discipline across the entire retail organization resulting higher closure rate.

Workstream Automation was founded in 2003 by a team of experienced IT and business professionals to deliver business process software tools and methodologies that help clients analyze, improve and implement changes to how they work. We enable clients to quickly optimize their business processes and realize a rapid gain in targets.

workstream *automation*

Workstream Automation Limited
Address: Ferndale House
Byfleet Road , Cobham
Surrey KT11 1DY
United Kingdom

Tel: +44 1932 589765
www.workstreamautomation.com