

Evercore Private Funds Group

CASE STUDY



“ Squirro has added a layer of real-time integration into our CRM, creating dynamic and topical feeds that contribute to our knowledge of individual existing clients, prospects and markets, ultimately adding value to our research and follow up capabilities. ”

Sachin Mitra, UK institutional market coverage at Evercore Private Funds Group

The Challenge

Sachin works for Evercore Partners in the Private Funds Group (“PFG”), based in the UK. They provide comprehensive global advisory services on capital raising mandates across the alternatives asset class for select private fund sponsors. PFG is one of the few globally positioned firms in the private placement landscape and serves clients from North America, Asia and Europe from offices in London, New York, Houston, San Francisco, Hong Kong and Sydney. It is important they:

- Have highly relevant and informed distribution and originati-on conversations with clients
- Are able to track and observe market trends for private equity and other alternatives
- Ensure information about prospects is always up-to-date

The Solution

With Squirro, Sachin is able to centrally aggregate relevant news about clients and prospects in one managed CRM profile. This contributes to a more efficient research, monitoring and tracking process of existing clients and key prospects. The continuously updated feed provides timely updates on an account without having to proactively re-perform searches.

The Impact

- Squirro allows Sachin to see relevant news content centrally within his CRM without having to perform additional external searches
- Squirro has added a layer of real-time integration and support for examining private markets that, unlike public market tracking, are largely dependent on proprietary research and market intelligence
- PFG are continuously working with Squirro on how it can further add value and offer more creative and efficient research solutions

About Evercore Partners

Evercore Partners (“Evercore”) is a leading international independent investment banking advisory firm, providing strategic advisory services on mergers, acquisitions, disposals, private placements and capital market transactions.

EVERCORE

Authorized and regulated by the Financial Services Authority.



About Squirro

Squirro is the personal digital research app. Broader than feeds and more specific than search, Squirro filters out the noise to give you the content that matters most.

Squirro scans thousands of sources from social media, private databases and company internal sources to find the most relevant on your topic of interest. The result is a living collection you can synthesize, analyze, and share.

Squirro is developed by passionate entrepreneurs with a simple vision: simplify the everyday need to find, remember, organize and collaborate on content intelligence. They created Squirro following Memonic, the award-winning, online note-taking app and the Swiss search engine local.ch.

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