



Cirrus Insight

Gmail, Outlook,
Office 365 Integration

By Visionaries

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01

INEFFICIENCIES & OPPORTUNITIES

Sales organization's efficiency & effectiveness
at stake and inefficiencies
Customers' needs & expectations



Olivia feels that Salesforce is a burden and is taking time away from her work and daily life.

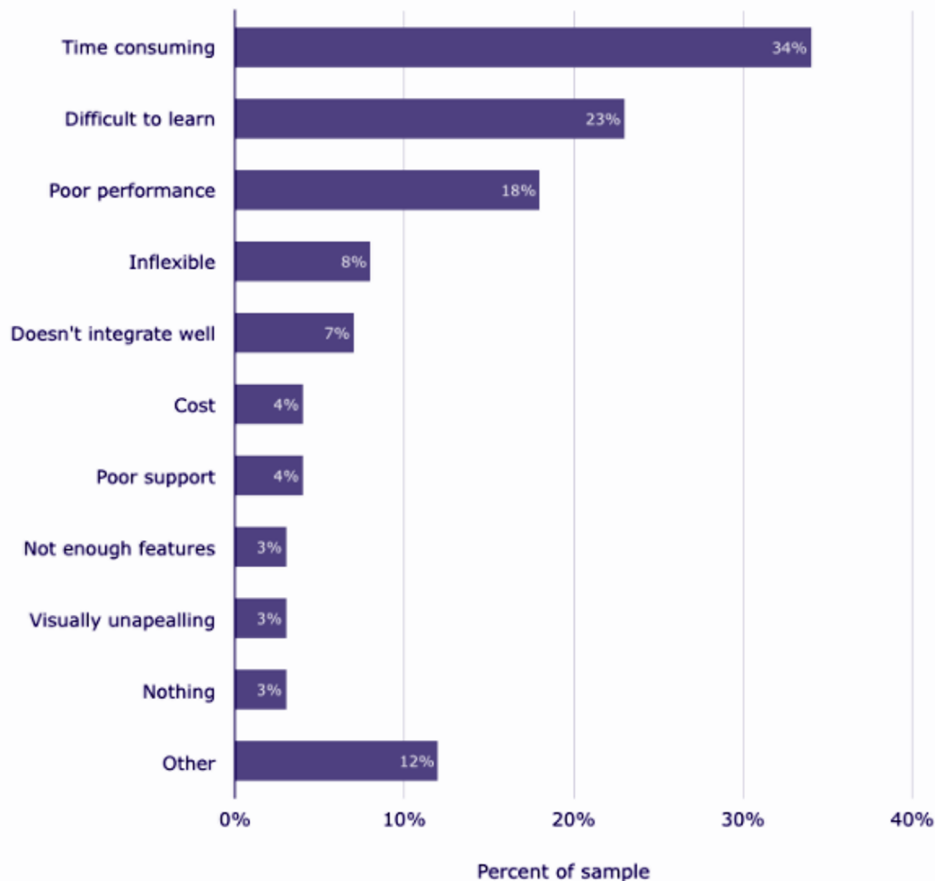
Meet Olivia

Olivia is a sales executive for a medium-sized B2B company.

As her company is using Salesforce, Olivia has to spend **1-2 hour daily** to update her CRM, including filing emails, recording sales activity, and updating on opportunities.

In fact, time consuming is the most common dislike salespeople have with CRM

Top Dislikes Salespeople Have About CRM Systems





***Michael needs data and reports improve
his company's sales process.***

Meet Michael

Michael is Olivia's boss.

Michael feels that the company's CRM **does not have enough data necessary** for him to do forecasting and managing his team.

Thus, Michael asks Olivia to spend even more time updating data into Salesforce.



**Michael and Olivia have the same problem about CRM
as many other sales leaders and sales executives do.**

Customer needs and expectations

Sales organizations typically want to improve their CRM in three aspects:



Less Time Consuming

- Sales reps spend lots of time to update contact information, record meetings, and go back-and-forth between Salesforce and their email inbox
- Sales leaders always have to chase their reps to update activities on Salesforce



Better Insights

- Sales reps want to know how customers have interacted with their business (**e.g. have they visited a link or clicked on an email**) to follow-up at the right time with the right person
- Sales organizations want to know where the customers are in their customer journey for better pipeline management and forecasting



Less Waste Opportunities

- With all sales activities recorded by the reps, sales leaders can effectively analyze activity trends and KPIs to identify opportunities, hot leads, and take actions when needed

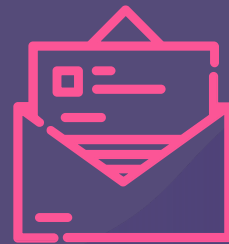
02

**SALES TECH
INTRODUCTION & FEATURES**



Cirrus Insight is a CRM application that **integrates Salesforce with Gmail, Outlook, and Office 365.**

By **bringing CRM to the email inbox**, Cirrus Insight automatically synchronize activity data and deliver customer analytics to to users.



The core features of Cirrus Insight are designed to improve **email productivity and sales analytics**

Executive Summary

Cirrus Insight is a CRM application that integrates Salesforce with Gmail, Outlook, and Office 365. The main focus of the application is to improve email productivity and sales analytics by offering a wide range of features, such as activity sync, task sync, calendar scheduling, buyer signals, attachment tracking, or sales cadence. Overall, Cirrus Insight helps sales organizations reduce time spent on unmeaningful activities, achieve better insights, and prevent wasteful opportunities.

With its functionality, Cirrus Insight is facilitating sales organization digital transforming into Sales 2.0 and Sales 3.0. On the digital sales transformation pillars/levels, Cirrus Insight is driving organizations' Process/Sales Engagement level. For salespeople at an individual level, the application serves as a technology for augmentation, assistance, and automation.

Competitive and importance, difference, and relevance analysis reveal that buyer signals, task sync, contact information capture, attachment tracking and pricing are the current relevant attributes that Cirrus Insight should focus on. Attachment tracking and auto contact information capturing are also two features that Cirrus Insight has clear advantage over competitors. However, competitive analysis has reveals several potential improvements that the application could make in the future.

Less Time Consuming



Activity Sync

Emails, events, and other activities are automatically added to records in Salesforce



Capture Contact

Contact information from customers' signature are automatically captured into the system



Task Sync

Tasks can be bi-directionally sync and managed between email and Salesforce task lists



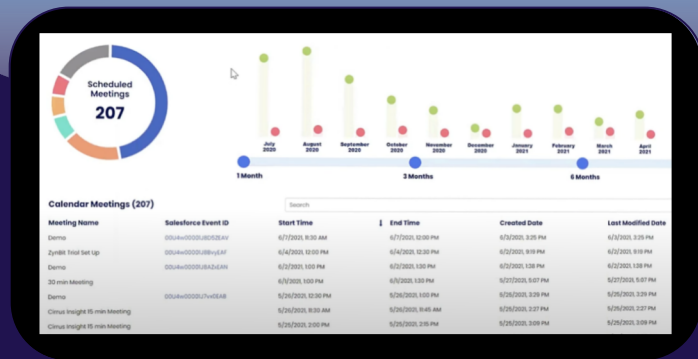
Calendar Scheduling

Create unique calendar link in each sales rep' email for easier scheduling. All events are sync with Salesforce



Salesforce Sidebar

Control sales pipeline right from email inbox



Better Insights



Buyer Signals

Track customers' response to emails (opening, clicks, link visits, replies, etc.)



Attachment Tracking

Track exactly how customers engage with attachments (who opens, what pages they read, who they forward it to & when, where, how long)



Less Waste Opportunities



Sync

All activities of sales team are captured so that sales managers can optimize pipeline performance



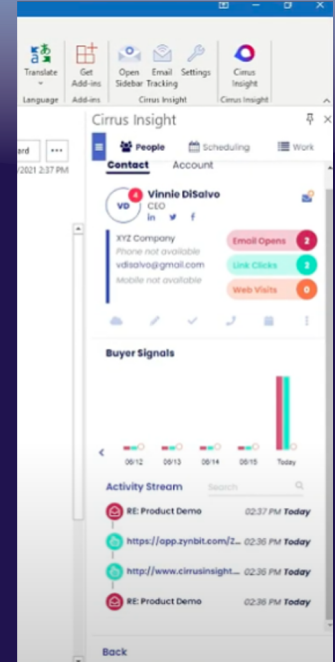
Sales Insight

By having insights on important metrics including email opens and clicks, sales reps know how to follow-up at the right time to the right customer



Sales Cadence

Automatically trigger personalized emails, calls, and calendar reminders to reduce waste opportunities





Cirrus Insight helps salespeople like Michael and Olivia improve their sales productivity and effectiveness.

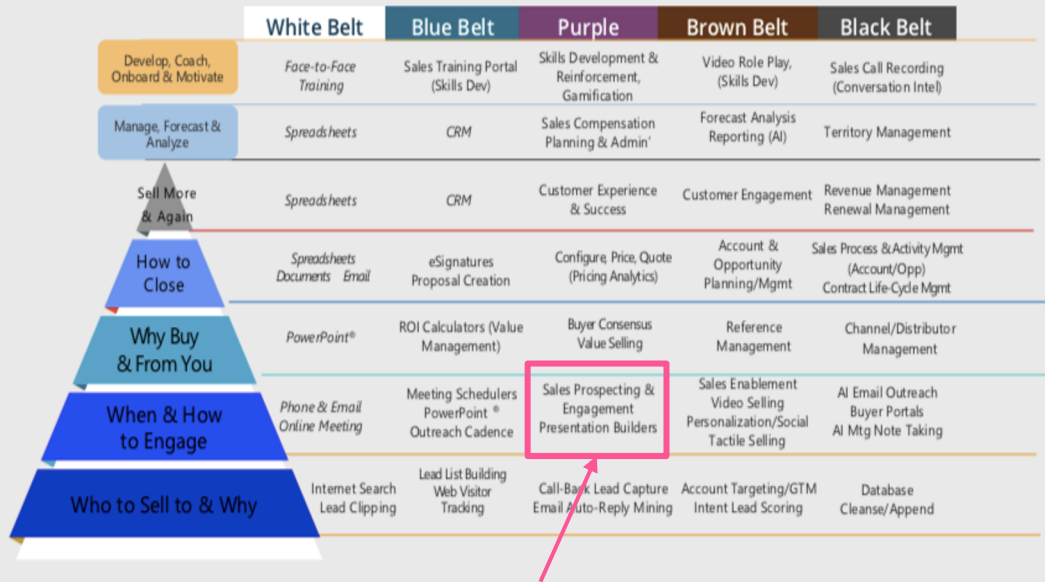
Digital Sales Transformation Pillars/Levels

Cirrus Insight is facilitating sales organizations' digital transforming into Sales 2.0 and Sales 3.0.

Technology-Guided Salespeople	Technology-Guided Sales Organizations			
	People	Structure	Process	
			Sales Engagement	Customer Engagement
Augmentation			Cirrus Insight generates important insights about emails and attachments for users to follow-up at the right time and improve sales conversion. Sales cadence also reduce waste opportunities.	
Animation				
Assistance			Cirrus Insight simplifies the usage of CRM system for salespeople with the sidebar, bringing Salesforce to the user's inbox, The app also offer a calendar scheduling feature.	
Automation			Cirrus Insight automates various activities: emails, events, tasks updating; adding contact information; emails, calls, reminders scheduling.	

Technology Gaps

Identify Technology Gaps



Source: VendorNeutral

At a customer level, Cirrus Insight mainly fills the technology gap belongs to the **“When & How to Engage”** level, focusing on **sales prospecting**.

Cirrus Insight improves the way organizations identify potential customers, develop prospect database, and communicate with leads with the goal of converting them into customers.

03

COMPETITORS ANALYSIS & ASSESSING FEATURES RELEVANCE

Main Competitors



Was the biggest competitor in the past. Merged with Cirrus Insight in 2021



salesforce inbox

The current main competitor of Cirrus Insight. Launched in 2020 by Salesforce

Other small players:



Feature	Cirrus Insight	Revenue Grid	Groove	LinkPoint Connect	Salesforce Inbox
Activity Sync	offered	offered	offered	offered	offered
Buyer Signals	offered	partially offered	offered	partially offered	offered
Task Sync	offered	partially offered	not offered	offered	not offered
Auto Contact Capture	offered	partially offered	partially offered	not offered	not offered
Calendar Scheduling	offered	offered	offered	not offered	offered
Attachment Tracking	offered	partially offered	partially offered	partially offered	not offered
Analytics	partially offered	offered	offered	not offered	offered
Sales Cadence	offered	offered	offered	not offered	offered
Email Templates	offered	offered	offered	not offered	offered
Availability	Gmail, Outlook, Office 365	Outlook, Gmail	Gmail, Microsoft 365	Outlook, IBM Notes, Office 365, Gmail	Gmail, Outlook, Office 365
Pricing (monthly)	\$7 – \$27 per user	\$25 – \$99 per user	\$12 – \$22 per user	\$16 – \$19 per user	\$25 per user

Feature	Offered by/5	Market availability	Difference score	Difference Score/7 (D)	Importance score/7 (I)	Relevance score (D x I)	Differentiating attributes
Activity Sync	5	100%	0%	0	7	0	
Buyer Signals	3	60%	40%	2.8	7	19.6	>AVG
Task Sync	2	40%	60%	4.2	5	21	>AVG
Auto Contact Capture	1	20%	80%	5.6	4	22.4	>AVG
Calendar Scheduling	4	80%	20%	1.4	7	9.8	
Attachment Tracking	1	20%	80%	5.6	6	33.6	>AVG
Analytics	3	60%	40%	2.8	5	14	
Sales Cadence	4	80%	20%	1.4	6	8.4	
Email Templates	4	80%	20%	1.4	3	4.2	
Availability (Gmail, Outlook, Office 365)	3	60%	40%	2.8	5	14	
Pricing	5	100%	100%	7	6	42	>AVG
Relevance & Differentiation Results						17.18	vs Relevance Score AVG

04 SWOT ANALYSIS

Strengths

- Merger with its biggest competitor, Zynbit
- Focus on one unique product
- Unique functions (attachment tracking)
- Competitive pricing

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Opportunities

- Board potential market
- Increased demand from sales
- This fast growing industry make Cirrus Insight more likely to stand out

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Weaknesses

- Relatively small volume
- Lack of brand competitiveness
- Analytics
- Poor customer satisfaction (performance and tech issues)

Threats

- Salesforce itself offers competitive products
- Compete with the industry oligopoly
- Many homogenous small competitors

05

**POTENTIAL
IMPROVEMENTS**

2-Step Improvement for Cirrus Insights



Step 1

Be stable & identifiable

Enhance the current core attributes & **differentiate** better with its competitors



Step 2

Be full-featured & advanced

Improve analytic functions, showing comprehensive insights for the whole pipeline

Cirrus Insight **User Ratings** Cr. g2.com



Ease of Use



Quality of Support



Ease of Setup

"Occasionally the information may be **incorrect** and follow a template for messages that is **not appropriate**."

Peter S

"Every once in awhile the Chrome extension **conks out**..."

Jennifer H

"Running CI with my **calendar** was a huge **struggle** for me. "

Igor G

"When I attempt to develop something attached on the **sidebar**, it's not filled. "

Philippa L

"For **Outlook** it is slow and clumsy. "

Unknown

Cr. g2.com

User Reviews

"It would be nice to **customize** the **sidebar**."

Michelle M

"Although it is an excellent application, it has certain **flaws and performance issues**. "

Kevin A

"Contact **synchronization errors** and that there are times that you do not attach the emails sent in Salesforce."

Unknown

"Having a box **explaining features** or a redirection to a **help center** could help us understand all features and functions."

Jorge P

Enhance the **Current Attributes**



Stability

Fix the current bugs and errors. Make sure the functions work well.



Personalization

Offer the users options to personalize their sidebar for more convenient usage



Compatibility

To synchronize well with different email & calendar platforms



Accessibility

Offer the users a guidance and/or a help center, helping them understand the functions.

Cirrus Insight should improve to be more **stable** and **easier** to use.

Better using experience combined with unique functions help differentiate itself to the competitors.

Be Full-featured and **Advanced**



Improve **Analytic** Functions

With the data captured from the emails, Cirrus Insight can improve analytics to show insights for the **whole pipeline**



More **Functions** On the Way

Cirrus Insight can develop more functions after growing to be big enough. For example: **AI suggestion and forecasts**

Thanks

Do you have any questions?

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