

From CRM Chaos to 28x ROI:



# A Sales Efficiency Story

Sales reps are spending too much time on everything except selling. Manual CRM updates, fragmented tools, and administrative overhead are cutting into productivity—and impacting revenue performance.

## Overview

A leading cloud communications company faced a familiar challenge: sales reps were spending more time on CRM admin than on selling. Data hygiene suffered. Forecasting was unreliable. Manual updates created bottlenecks across the revenue team.

Enter Squid AI Sales Agents. By automating CRM updates from calls, notes, and emails, the company freed reps to focus on what matters: closing deals.

### Key Results

**\$3.3 m**  
Annual Savings



**28 x**  
ROI



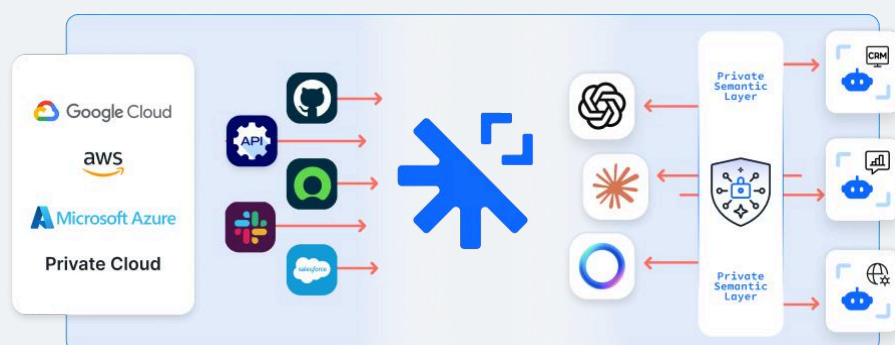
**1.5 wk**  
Payback Period



## The Impact

### The Challenge

Sales reps were buried in administrative tasks. Important deal details were hidden in spreadsheets, call notes, and inboxes. CRM fields were incomplete or outdated, leading to inaccurate reports and missed revenue opportunities.



### The Solution

The company deployed a Squid AI Sales Agent that:

- Extracted insights from previous calls and notes
- Automatically updated Salesforce with accurate data

The agent was integrated directly into Salesforce and ran quietly in the background. There were no new tools, no workflow disruption, and no behavior shift required. Reps worked as usual, only faster, and with better data flowing through the pipeline.



**Deliver AI you can trust.**

Contact us today to schedule a custom demo and put private agents to work.

[www.getsquid.ai](http://www.getsquid.ai)

# What Else Is Possible

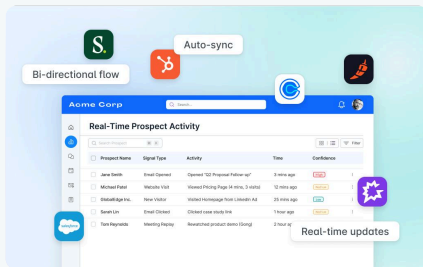


While this deployment focused solely on CRM field automation, Squid AI Sales Agents are capable of much more. Our agents can also:

- Suggest follow-ups based on recent interactions
- Enrich account data for improved pipeline visibility

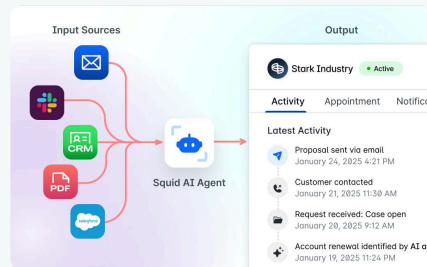
These capabilities can be layered in as teams scale their adoption. For this company, the goal was clear: prove value and grow from there.

## What Changed



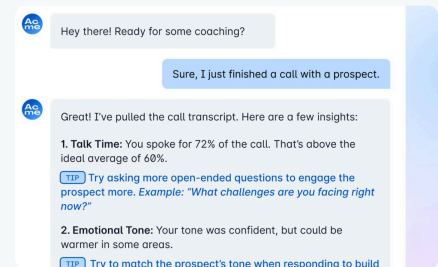
### More Time Selling

Reps stopped spending countless hours updating CRM fields and spent that time engaging with prospects, advancing deals, and building stronger customer relationships.



### Cleaner, More Actionable Data

Salesforce fields stayed complete and up to date, giving sales teams a clear view of pipeline health without second-guessing the numbers.



### Better Forecasts, Faster Decisions

Leadership had reliable, real-time data to plan, prioritize, and forecast more effectively. This removed the guesswork from their future growth strategies.

## Why It Worked

The agent worked quietly in the background, automatically capturing, organizing, and syncing critical information into Salesforce. Squid AI fits seamlessly into the company's existing workflows, avoiding disruption or forcing reps to learn yet another tool. By eliminating the friction that often slows AI adoption, it gave sales teams more time to focus on customers and gave leaders real-time access to better data.

## The Bottom Line

Within weeks of launching just one Squid AI agent, the company:



Reduced Manual  
Data Entry By 90%



Reclaimed Thousands  
of Rep Hours



Identified Insights  
+ Revenue Faster

## Want to See How Squid AI Can Help Your Team?



**Deliver AI you can trust.**

Contact us today to schedule a custom demo and put private agents to work.

[www.getsquid.ai](https://www.getsquid.ai)