



## REMBRANDT FUSIES & OVERNAMES

# Winning More Deals with Intelligent Search for Salesforce



### Snapshot:



-  **Industry:** Financial Services
-  **Geography (HQ):** Europe
-  **Coveo Solution:** Coveo for Salesforce

### Results at a Glance:



-  Financial analysts find deal-related information and expertise faster, enabling them to better serve customers.
-  Improve the proficiency of financial analysts and allow them to win more deals.
-  Consultants and partners will become more productive, leading to more business for Rembrandt.

## Client

[Rembrandt Fusies & Overnames](#) (Mergers & Acquisitions) is a leading independent corporate finance advisor for privately-owned companies in the Netherlands. For years, Rembrandt financial analysts and MBO partners had struggled to “know what they knew.” It was difficult to access relevant transactional information via Salesforce, such as key account information. With a mandate to transform their digital workplace, including moving systems to the cloud, IT Manager Gerard Snippe needed to find ways to help financial analysts gain the knowledge and expertise they needed to win more deals, faster. He learned about the Coveo for Salesforce Service Cloud from parent firm, The Rabobank Group, which has been using Coveo’s Intelligent Search platform for years as part of its knowledge management program. Knowing the power of Coveo technology on-premise, Snippe was eager to apply the same unified, secure indexing technology in the cloud for Salesforce.

The ultimate goal was to help the financial analysts at Rembrandt responsible for M&A business to make profitable deals happen more quickly, and Snippe felt that contextually relevant knowledge and experts were key to “matchmaking.” “We’re one of the largest M&A companies in The Netherlands,” Snippe says, “and we use Salesforce as our matchmaking system. The database has equity firms, investors, holding companies...when a buyer approaches us the financial analyst starts an opportunity in Salesforce. We needed a way to automatically match them with potential sellers based on an array of account information in Salesforce and from custom financial applications we’ve built on the [Force.com](#) development platform.”

### Learn more and request a demo:

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# Coveo for Salesforce

## Business Objectives:

-  Provide Rembrandt's financial analysts with the knowledge and expertise they needed to win more dealers, faster
-  Uncover similar transaction histories which could provide knowledge that would influence decisions about current deals
-  Provide partners with quick and effective access to deal-related knowledge and information via Rembrandt's partner portal to enable better and faster decision-making

**“ There was just no simple way to accurately present only the most relevant information to the financial analyst based on the deal they were working on.”**

John Hoekman, Project Manager at Rembrandt

## Related information and accounts, instantly recommended by Coveo

Snippe's first step was migrating legacy systems into Salesforce, which created its own set of challenges. This included transitioning all data from the firm's legacy CRM system, Saleslogix, SharePoint, Microsoft Office 365, and various HR applications all into Salesforce, in addition to building a set of industry-specific apps on the [Force.com](#) platform.

It was impossible for the financial analysts to gain a consolidated view of accounts and transactions in the Salesforce interface. “At one point I tried to create a report to gather information from Salesforce to find the right information on specific accounts, however I was not able to filter related histories within Salesforce,” Snippe says.

Customizing the Salesforce user interface to show all related information proved equally challenging. “It was difficult to see all the information under the Accounts and Opportunity fields within the Salesforce UI, and making customizations to the Visualforce code resulted in page load times dropping,” Snippe said. “There was just no simple way to accurately present only the most relevant information to the financial analyst based on the deal they were working on.”

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Gerard Snippe, IT Manager at Rembrandt

## Contextual Knowledge Delivered via the Salesforce Interface

Snippe realized that Coveo for Salesforce Service Cloud would give the financial analysts the ability to quickly discern information for faster decision making. Coveo for Salesforce was implemented and the Coveo Insight Panel added to the Salesforce Account View.

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# Coveo for Salesforce

Now, as financial analysts start new opportunities, Coveo becomes their primary method to find potential buyers. Coveo instantly recognizes the accounts that users are working on, and automatically recommends content from across the Salesforce platform to help financial analysts match and work deals, faster and more effectively. Salesforce custom objects that provide account details, such as number of employees, turnover rate and geographic region, are presented within the Coveo search interface that's embedded in Salesforce, allowing analysts to quickly filter search results based on certain criteria rather than manually drilling down into Salesforce fields to uncover this information.

## Configuring a Custom Knowledge Solution for Digital Workplace Collaboration

One of the challenges for Rembrandt, where all systems are cloud-based, was viewing all communications with or about a particular account in Salesforce, which frustrated the analysts and often meant that key information could be missed. To ensure a 360-degree view of deal-related knowledge, Snippe connected Microsoft 365 and Salesforce data with Coveo. "In Salesforce, it was sometimes challenging to attach emails to accounts," he said. "Now, everything is indexed automatically, and our users see all related emails on an account, without doing anything." Snippe relates that the MBO Managing Partner finds this capability "amazing," as it increases deal knowledge to more effectively serve their customers.

The Coveo Insight Panel has proven highly successful at surfacing and cross-referencing information for the analysts. Snippe reports that he leverages its flexibility to replace certain Salesforce fields, such as history, email and events. For example, Coveo facilitates the lead process when Rembrandt receives new opportunities from its parent company, The Rabobank Group. "We use Salesforce to store the various contacts at Rabobank who provide us with leads, but we were unable to filter out contacts who left the company," Snippe says. "So we created an extra tab in the Coveo Insight Panel to filter contacts who had left, allowing our financial analysts to see only those bankers who provide us with the most leads. It proved so effective that we replaced all these related Salesforce lists with the Coveo Insight Panel."

The Coveo Insight Panel also presents information from a series of custom applications that Snippe has built on the [Force.com](https://www.force.com) platform. One app is the SBI application, which profiles companies based on specific industry criteria and knowledge, but required searching across various Salesforce fields, such as Accounts and Contacts, to uncover relevant information. To help analysts gain this valuable industry insight, Snippe added a "Knowledge" tab to the Coveo Insight Panel so that an analyst working on an opportunity within a specific industry automatically sees knowledge about that industry, such as FAQs, experts and best practices related to the specific deal. "Thanks to Coveo, we've built our own custom knowledge application and allow analysts to share their experiences and best practices with colleagues," Snippe says.

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### Benefits

According to Snippe, Coveo for Salesforce has enabled the financial analysts to “upskill” on specific accounts and industries as they work, improving both proficiency and productivity with automatic, real-time access to deal-related information. Specifically:

- ▶ Analysts gain a competitive edge and better serve customers with deal-related information at their fingertips
- ▶ Shared knowledge helps win more deals. “We have so much information and knowledge, by industry, which is important for serving customers and winning new deals,” Snippe says.

“With Coveo, we are able to perform very sophisticated searches from which we are able to make more matches, and as a result, win more deals,” says John Hoekman, Project Manager at Rembrandt. “Small and mid-sized business owners and executives trust us with their most important business transactions - selling, buying or financing their companies. We need the right information at the right time to ensure their success, and Coveo enables us to do that.”

Moving forward, Snippe plans to launch a partner portal to allow Rembrandt partners and consultants to log-in, research new opportunities, uncover potential buyers, and more. Coveo will serve as the intelligent search backbone for this portal, extending the deal-winning success analysts have found to the company’s partners as well.

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