



CASE STUDY

How Evaluator Group simplified analysis for their clients

Evaluator Group is an IT analyst firm that provides independent expertise on data and information management. They were looking for an easier way to make research data available to their clients.

Key benefits

- Easy to build on existing spreadsheets.
- More efficient access to data for their clients.
- Easily updatable through dynamic data loading from Google sheets.
- Integration with their CRM through the Squirrel365 Zapier connector.

“Using Squirrel365 we can take the Excel data and turn it into a much more useful interactive tool”

Mitch Lewis
Research Associate, Evaluator Group

The Challenge:

Move away from Spreadsheets & PDFs

Evaluator Group offers their clients in-depth research. Helping IT administrators and managers to understand how technology products and architectures can deliver optimal solutions for the modern data centre.

The data associated with this research was typically collected and analysed in Excel spreadsheets and then compiled into extensive PDF files for delivery to clients.

Although these PDFs contained all the information needed, they were hard to navigate. Extracting the specific information of interest was a frustrating and time-consuming process.

They needed a better method for presenting the information which allowed clients to more quickly and easily use the results of their research.

As Mitch Lewis put it:

“Our comparison matrices, which offer side-by-side comparisons of products, were created in Excel and delivered as flat PDFs, but this made them hard to read as it was not possible to focus on the products you want to compare”.

The Solution:

Interactive research navigators

Easy to build

As the research data was already in Excel it was simple to bring it into the Squirrel designer and add an interactive UI over the top of it.

Using the point-and-click capabilities of the Squirrel designer, and their existing Excel skills, the team at Evaluator Group were able to quickly create an intuitive, interactive interface which made it significantly easier for their clients to get value from their research data.

Dynamically Updated from Google Sheets

Squirrel365's connectivity to Google Sheets allows Evaluator Group to continually update their research data without having to deliver more content to their clients. The existing Squirrel projects automatically update as the data in Google Sheets changes.

CRM Connectivity

Evaluator Group made some of their Squirrel projects available for free on their website as an introduction to their services.

As part of this, they used Squirrel's integration with Zapier to capture lead information from the running Squirrel project directly into their CRM system.

"What we have done with Squirrel is create an interactive version of the matrix. Clients can simply pick the products they are interested in to get specific comparisons"

Mitch Lewis

Research Associate, Evaluator Group

The Results:

Easier to update. Easier access to data for clients.

As the output of Squirrel is standard Web content, Evaluator Group could easily embed their new capability directly inside their existing client portal, providing seamless access to the new streamlined data navigators. This gave their clients a natural path to better, easier to access information.

About Squirrel365

Squirrel is a software product that lets you turn an ordinary spreadsheet into extraordinary content. All you need are your existing spreadsheet skills. **There are three simple steps...**

1. Import

Import your Excel or Google files or start from scratch in the Squirrel spreadsheet.

2. Create

Create interactive content by adding visual components and connecting them to the spreadsheet.

3. Share

Share your project via a web link or embed it into SharePoint, PowerPoint or your own website.

