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# AI Powered Insights for the Finance Sector

Artesian Solutions

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Create fans, not just customers



# THE FINANCE SECTOR IS CHANGING

The traditional banking industry as we know it, will transform over the next 5 years as AI technology gathers pace, facilitating industry change and different consumer demands. Artesian Solutions helps the leading banks and professional service organisations harness the true benefits of the internet and social prospecting.

- Buyer expectations rise as they become more educated and informed
- Competition increases as the market becomes more crowded

The need to align and meaningfully engage with clients has never been greater. It's something that requires a thorough understanding of the market, the company and people you are working with.

To remain competitive, banks are leveraging digital solutions to make sense of structured and unstructured data, predict customer needs, automate and direct pipeline activities, and deliver hyper-personalised communications and custom marketing.

# HOW DO WE HELP...

Artesian have developed an impressive list of clients which include companies such as RBS, Santander and HSBC. With the use of artificial intelligence layered on top of company information, data and news, Artesian helps you to spot opportunities and risk, build relationships and accelerate sales. It's used by all the tier 1 banks that are reliant on a personal sales relationship and customer experience to grow the business.

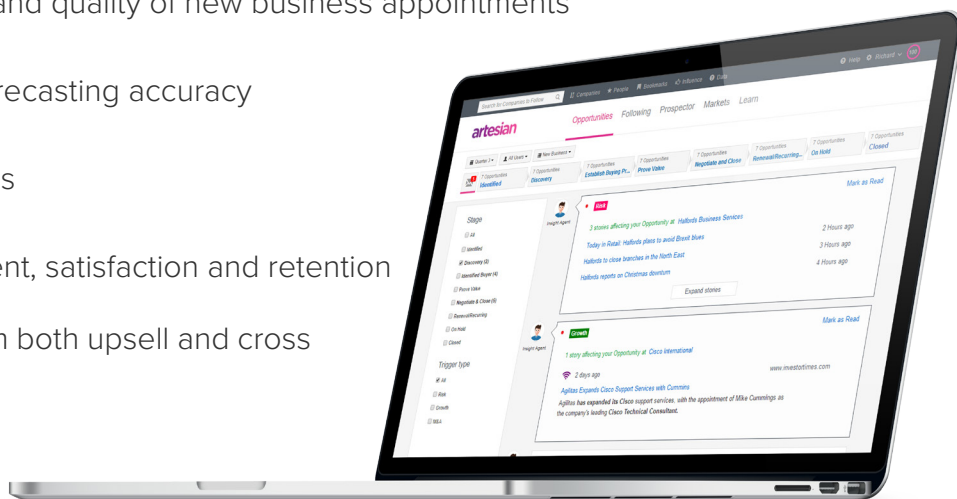
Keeping on top of developments in your portfolio is critical to retaining or acquiring new business. But we know it's a challenge. How do you know which of your clients or prospects has just expanded into Europe, which one's credit rating has just changed or has hired a new CFO? Missing these events could leave the door open to your competition.

At Artesian, we provide timely insights that give our clients first mover advantage.

As a business leader, Artesian helps you on-board your sales team more quickly, manage risk in your pipeline and foster customer curious behaviour that differentiates your team from other competitors in the financial services industry, ultimately leading to more revenue.

## What are the benefits?

- Average time spent researching client developments reduced by 75%
- Better anticipate and proactively respond to future client needs
- Increase in the number and quality of new business appointments
- Improvement in sales forecasting accuracy
- Accelerate pipeline deals
- Better customer-alignment, satisfaction and retention
- Increase in revenue from both upsell and cross sell opportunities



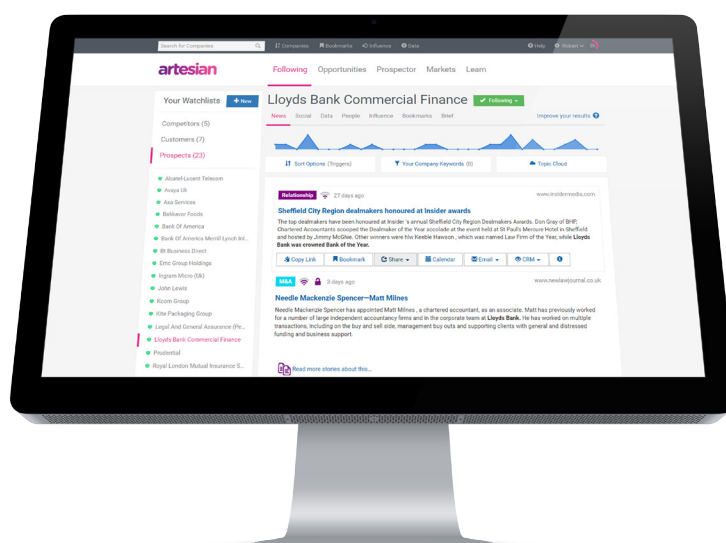
# PRODUCT FEATURES

Artesian provides market and company insight, backed up by managed services and training.

- **Company Records** - Search for comprehensive information on millions of companies
- **Prospecting** - Filter and shortlist over 4 million companies. Add customers, prospects, partners and competitors to your watch list
- **Market News** - Stay up-to-date with a weekly news digest featuring all the top news stories in your market
- **News Feed** - Track companies, align with customers and manage sales opportunities with the daily news feed, prioritised by relevancy
- **Engagement** - Start a conversation and engage intelligently by sharing the news directly through Artesian
- **CRM Integration** - Log in to Salesforce.com or Microsoft Dynamics and see Artesian intelligence within the company record
- **Meeting Preparation** - Prepare for upcoming meetings with extensive profiles on meeting attendees
- **Analytics Dashboard** - Monitor client engagement and best practice behaviour across the business

Artesian's dedicated onboarding team and academy learning management ensure organisations get the most out of the service. Training, technical support and customer enablement are available throughout the lifecycle.

Artesian delivers  
**12.5 million**  
insights per month, on  
**700,000** companies  
to **30,000** users



## **London and Central at Metro Bank**

### **What we aimed to achieve**

During the six-week trial, Metro Bank users followed over 1,200 companies and received 2,700 actionable insights (news about growth stories, mergers and acquisitions, management changes and risk, as well as business and people updates).

As a result, customer engagement behaviours and user productivity improved across the board. Based on this initial data Metro Bank rolled Artesian out to 120 Relationship Managers in order to:

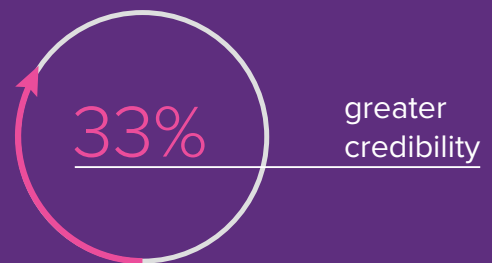
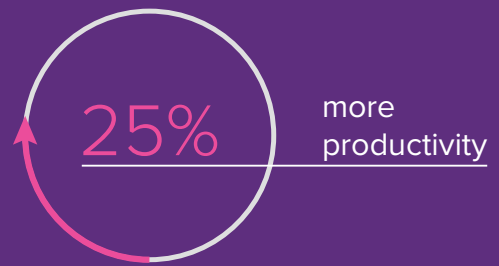
1. Gain quicker and greater insight into their customers, demonstrating that they know them, understand their needs and that they care
2. Have value-added, insight-driven conversations about their business, not just how Metro Bank can help
3. Better anticipate and proactively respond to future needs
4. Achieve efficiencies in meeting preparation, with real-time intelligence delivered via the Ready application
5. Ensure they feel confident and prepared, and that the focus of the meeting is on the customer and their exact needs at that moment in time.

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Artesian will help give us the edge when it comes to using technology and insight to deliver great customer experiences – helping us create fans, not customers. Artesian is a differentiated product, certainly worthy of investment.

**Kevin Barrett**  
**Regional Director**  
**London and Central at Metro Bank**

## What do our customers say?



# ABOUT ARTESIAN

With the use of Artificial Intelligence layered on top of company information, data and news, Artesian helps you to uncover opportunities, build relationships and accelerate sales.

Artesian gathers information on industries, organisations, individuals and topics from millions of sources and uses advanced data science to filter and transform the information into commercially valuable insights.

With Artesian, you can track your customers, prospects competitors and partners, spot business opportunities and manage risk.

Artesian helps drive customer alignment, credibility, competitiveness and client satisfaction.

## Training, implementation and support

Artesian will manage the integration, set up and training allowing you to focus on sales, not software. We set up keyword topics to ensure the highest degree of relevancy and offer after sales support and ongoing keyword optimisation as required.

[artesian.co](https://artesian.co)

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