Transform raw business performance data into actionable insight

Meet FlowPoint, your partner in escaping the data abyss

Effectively managing risk requires transparency into your borrower's business performance.

But costly manual workflows make it challenging to:

- Collect loan compliance data in a standardized, scalable way.
- Keep this data consistently organized over time and ready to meet any analytical or regulatory need.
- Spot leading indicators of risk in near-real time and take corrective action.

These challenges force skilled account managers to spend attention on the mechanics of reporting and monitoring leaving less time for more valuable tasks.

Spend less attention on the mechanics of reporting and monitoring with FlowPoint's

Automated reporting processes	Analytics dashboards	Near real-time alerts

1. Standardize and scale your data collection and reporting workflows, creating early warning systems
2. Spend more time on risk analysis and less on operational data management
3. Improve clarity and simplicity around the reporting experience to build stronger relationships.
4. Generate a secure, standardized, time-series data room that provides shared source of truth and performance insight for you and your borrowers.

The best part? It's self-organizing through automated reporting.

We deliver results

+90%
compliance in loan reporting

☆☆☆☆☆
borrower experience

Materially
reduce your loan monitoring time

Let easy, transparent access to your business performance data unlock your competitive advantage

download our resources

Core Reporting Features

Visualize and monitor your portfolio's reporting health

Stay on top of your compliance requirements and proactively manage risks as they evolve with less effort. Learn from your data and share results to deepen client conversations and build stronger relationships.

Collect key performance metrics

Capture performance metrics that matter most to you through standardized, customizable FlowPoint forms. You can quickly, easily, and regularly capture reporting data for analysis and risk management. Build up a time series database of your fund's key performance indicators that are important to your firm and track their trends in near real-time. Set instant alerts based on customizable guard rails for your trends. Make forward-looking risk decisions based upon cleaner, more real-time data.

Transparently collaborate with your clients

Effectively communicate reporting requirements and expected cadence with your borrowers, ensuring you both understand exactly what's needed and when. Capture your digital conversations and clarifications, along with reporting data, for improved auditability and faster resolution. Be more transparent with your borrowers and give them real-time submission notifications and view access to documents they submit.

It's also easier to share context across your team when your confidential discussions are safely captured in one central place.

Centralize business performance reporting

It takes minutes to structure and schedule all your compliance documents and data request needs through our platform. Automate your reporting reminders and collection workflows, keeping your team focused on the challenging aspects of your business until it's time for analysis.

Organize compliance consistently over time

Our unique data room is consistently organized and easy to search, preview, download, and share for collaboration. With consistent categories across your portfolio, the FlowPoint data room will help you to meet any analysis or regulatory need.

Ready to learn more?

Get in touch for a demo.

info@flowpoint.co | flowpoint.co

FlowPoint