



Transform raw business performance data into actionable insight

Meet FlowPoint, your partner in escaping the data abyss

You need transparency across your portfolio to effectively manage risk.

- But costly manual workflows make it challenging to:
- Collect fund performance data in a standardized, scalable way.
- Keep this data consistently organized over time and ready to meet any analysis or regulatory need.
- Spot leading indicators of risk in near-real time and take corrective action.

These challenges force skilled people to prioritize the mechanics of reporting and monitoring, leaving less time for more valuable tasks.



Instantly leverage

Automated reporting processes

Analytics dashboards

Near real-time alerts

1. Standardize and scale your data collection and reporting workflows and create 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 a shared source of truth and performance insight for you and your portfolio clients

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 conversations and build stronger client 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.

Transparently collaborate with your clients

Effectively communicate reporting requirements and your expected cadence, ensuring both sides 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 and give your clients near real-time submission notifications and view access to the documents they've submitted.

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

