

Quick Facts

Customer:

A middle-market private equity firm. Visit www.ilevelsolutions.com/clients/ for a complete list of iLEVEL™ clients.

Challenge:

Wanted to accelerate performance reporting, streamline quarterly portfolio reviews and expedite the valuation process for investments through effective organization of data from portfolio companies.

Solution:

iLEVEL Private Capital Data Platform.

Customer Benefits:

- i** Reduced the time to review and validate data for monthly dashboard reports by about 80%
- i** Automated collection of portfolio company data empowered the firm to assemble, analyze and disseminate data more efficiently, streamline valuations, conduct portfolio-wide analysis and more quickly prepare fundraising materials and LP presentations
- i** The iLEVEL platform provides a central repository of portfolio company data for all teams at the firm to analyze and track investments
- i** Improved communication and collaboration between the firm's portfolio administration, finance and deal teams

EFFECTIVELY ORGANIZE AND ANALYZE DATA

Middle-market Private Equity Firm Accelerates Value Creation by Deploying iLEVEL for Automated Collection and Centralized Storage of Portfolio Company Data

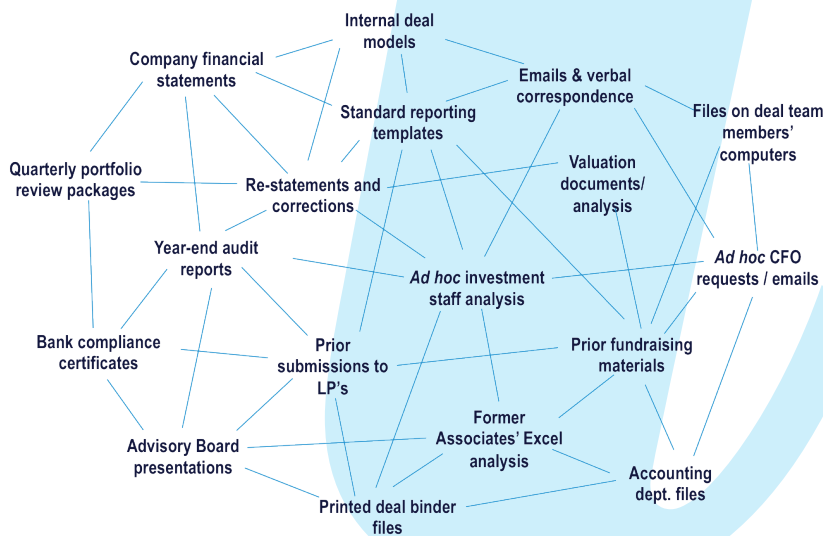
Challenge

A middle-market private equity firm that invests capital on behalf of its limited partners in niche businesses with solid market share, considerable growth potential and opportunities for value creation was looking to accelerate reporting, valuations and its quarterly portfolio review process. The firm's areas of expertise include the business services, manufacturing and healthcare industries. Its mission is to achieve superior long-term returns for its investors by leveraging its experience and industry relationships.

As a data-driven organization that uses actionable insights to boost growth and create value within its portfolio companies, the firm wanted to better monitor and manage key financial data and operational KPIs of active and exited investments.

In order to successfully accomplish these objectives, the firm was looking for a turnkey solution that could automate the collection of financial, operational and qualitative data from portfolio companies for internal and investor reporting. They also required that various data, sometimes spread across many departments of the firm, be stored in a central repository as a single source of truth.

Data Environment Prior to iLEVEL:



Solution

The iLEVEL cloud-based platform eliminated many manual processes and catered to the firm’s exacting business requirements. The data collection process is automated through the use of Excel-based templates that are scheduled and distributed to portfolio companies. These templates are integrated into a workflow process that allows data to be efficiently reviewed and approved by deal teams and others before being used for analysis and reporting. Key portfolio company data is stored in a central iLEVEL database for developing analyses, reports, presentations and portfolio reviews at the firm.

The iLEVEL team’s deep knowledge of the private equity marketplace, consultative approach and strong track record of providing world-class customer service played a decisive role in the firm’s choice of iLEVEL over other solutions available in the marketplace.

Results

With iLEVEL, the firm can now assemble, analyze and disseminate data more efficiently, streamline financial modeling and valuation, conduct portfolio-wide analysis, automate LP reporting and quickly prepare fundraising materials and investor presentations. iLEVEL has reduced the time to review and validate data for monthly dashboards by 80%.

Today, iLEVEL’s community of satisfied customers has expanded considerably to include 5 of the world’s 8 largest private equity firms as well as a significant number of middle-market firms. Clients of iLEVEL account for 1 in every 4 dollars raised by GPs during the last ten years. In addition, iLEVEL’s industry-leading cloud-based solution hosts over 350 million data points for 450 funds invested in nearly 3,500 portfolio companies.

About iLEVEL

iLEVEL offers the market-leading Portfolio Management Platform for the alternative asset management market. The innovative, highly secure Software-as-a-Service technology solution automates the collection, storage, collaboration, analysis, and reporting of portfolio data. Investors in iLEVEL include Blackstone (NYSE: BX), The Carlyle Group (NASDAQ: CG), Duff & Phelps, Hamilton Lane, Swift River Investments and Egis Capital Partners. For more information, visit www.ilevelsolutions.com.

For more information on why successful firms in the private capital marketplace have selected the iLEVEL platform, please contact iLEVEL at salesteam@ilevelsolutions.com.



Select Middle-Market iLEVEL Clients

