

Factsheet – upSWOT Business Health Dashboard

upSWOT Business Health Dashboard is a white-labeled portal offering business data consolidation and actionable insights

upSWOT helps financial institutions service small and mid-sized businesses by monitoring financial, sales and marketing customer data. It provides personalized offers and actionable prompts as well as real-time insights.

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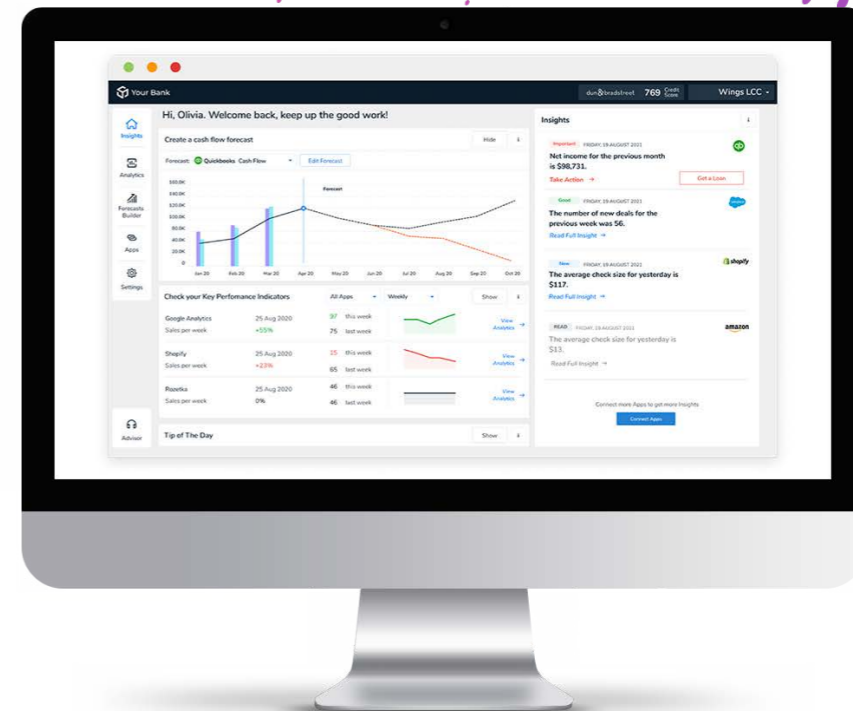
upSWOT's consolidated business data and actionable insights create a unique win-win situation for financial institutions and their SMB customers.

Alex Keltner
CEO, First Southern National Bank

The global pandemic has created a communication gap between financial institutions and clients. Therefore, small and mid-sized business are turning to online banking channels. Many financial institutions offer faster access to loans online by utilizing varied data. This helps small and mid-sized businesses in selecting a lender. To compete with the growing competition, simplify underwriting and speed up decision-making banks need access to more data.

According to Accenture's research in the US, 74% of small and mid-sized businesses don't have the relevant knowledge to manage their companies. 32% are ready to pay their financial institutions for business support.

upSWOT helps financial institutions service small and mid-sized businesses by monitoring customer data while providing personalized offers and insights.



upSWOT's Business Health Dashboard analytics shown above

How it works

upSWOT technology serves dozens of financial institutions by helping them build loyalty and grow engagement among their small and mid-sized business clients. It gives access to the business credit score from the largest bureaus and provides bankers with actionable insights. The platform provides a white-labeled service connected to the online or mobile banking application with the flexibility of being available as SaaS or deployed into the financial institution's secured cloud.

upSWOT enables business customers to connect their data for continuous, API-enabled access to QuickBooks, Xero, Salesforce, Stripe, Shopify and 120+ other business critical SaaS applications, providing access to more SaaS applications than any of its competitors. Data is aggregated in real-time, and thousands of signals are analyzed to help small and mid-sized enterprises better understand the health of their businesses via insight-based interactive dashboards, accurate

cashflow forecasts and simple to use budgeting. At the same time, financial institutions' partners obtain actionable data to meaningfully engage and help fuel growth.

On the back end, upSWOT transforms the data to simplify underwriting and renewals as well as provide personalized offers and insights. The marketing automation module is designed to send the right sales offers at the right time to the right customer. The data ensures relationship managers can upsell the right products and services while building more meaningful and longer-lasting relationships.

upSWOT's Business Health Dashboard is a powerful add-on to digital banking and can be seamlessly embedded as a white-labeled solution. The solution needs no integration with core banking systems and takes just one week to launch. It is pre-integrated with Finastra's Fusion Digital Banking for quick and easy deployment.

Why upSWOT?



A white-labeled solution with tools such as insight-based interactive dashboards, accurate cashflow forecast and simple to use budgeting.



120+ API-enabled apps including QuickBooks, Xero, Salesforce, Stripe and Shopify integrated into upSWOT.



Business application data is transformed into actionable insights and normalized to simplify renewals.



Relationship managers and call center employees can use analyzed data to help fuel growth for its business customers.



upSWOT Business Health Dashboard is pre-integrated with Finastra's Fusion Digital Banking solution and takes only one week to launch.

upSWOT provides growth in customer retention by 89% and in cross and up-selling by 18%.

Key benefits



Data-powered business growth

Data is connected to 120+ API-enabled apps and aggregated in real-time. It is further analyzed to better understand the health of small and mid-sized businesses. In addition, financial institutions' partners obtain actionable data to engage and help fuel growth.



Engagement and retention increase

Financial institutions can build loyalty and grow engagement among their small and mid-sized business clients. With its interactive dashboards, accurate cashflow forecasts and simple to use budgeting upSWOT ensures an 80% increase in engagement and 89% increase in retention.



Increase revenue and reduce cost

Using the upSWOT solution increases cross and up-selling of financial products and services by 18% during the first 90 days. In addition, continuous access to all financial data of the borrowers enables underwriting costs to be cut by 72%.



Reduce operational risks

Automated monitoring enables customers to permanently access accounting and business metrics such as balance sheets, churn rate and return on investments, mitigating the risks and helping financial institutions perform better.

Contact us

About Finastra

Finastra is building an open platform that accelerates collaboration and innovation in financial services, creating better experiences for people, businesses and communities. Supported by the broadest and deepest portfolio of financial services software, Finastra delivers this vitally important technology to financial institutions of all sizes across the globe, including 90 of the world's top 100 banks. Our open architecture approach brings together a number of partners and innovators. Together we are leading the way in which applications are written, deployed and consumed in financial services to evolve with the changing needs of customers. Learn more at finastra.com

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