

Overview

The SteelBridge Platform Partnership Program is a collaborative community that recognizes leading solutions providers to the alternative investment industry. iLevel is one of SteelBridge's oldest Platform Partners, so our knowledge of this product is deep, and is kept current with every new release. Benefit from our knowledge when performing an iLevel implementation by getting your data organized and loaded into their templates right the first time, without adding any additional burden to your current accounting and reporting teams.

Typical Client Challenges

- Manual recordkeeping using Excel required significant effort to ensure data integrity and accuracy
- Compliance team was requesting better operating control
- Manual reporting using Excel had limited capability and flexibility
- While capital flows freely to buy portfolio companies and invest in funds, performance data does not flow back nearly as freely

SteelBridge/iLevel Impact

- Developed a detailed workplan along with documenting the business requirements
- Confirmed the system implementation approach, then assisted with the implementation and configuration
- Performed data migration using data load templates and manual entry
- Encouraged client to contribute dedicated resources to the effort in order to adhere to agreed upon timelines
- Automated data collection across the portfolio into a single, normalized repository

iLevel Implementation Approach

Process

- Used various methods to discover, model, improve, and optimize business processes to align with the business requirements

Technology

- Determined the best use and configuration of the system to align with and improve upon processes, related to the business requirements

People

- Ran weekly team status meetings in addition to information gathering and decision making meetings
- Trained client team members on the collaboration using the new system

Design

- Combine data from capital call and distribution notices with granular portfolio company performance data and calculate your own IRRs

Management

- Led the project based on the detailed project workplan

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