

Charlesbank enhances data visibility and usability with the iLEVEL platform

Established in 1998, Charlesbank Capital is an experienced middle-market private equity firm with more than \$6 billion under management. Learn more at charlesbank.com

Challenge

Data consistency. Internal deliverables frequently included conflicting numbers, because source documents were updated inconsistently.

Data access. Because the data was kept in spreadsheets, it wasn't easy for staff to access what they needed when traveling or working remotely.

Visibility. Charlesbank's senior management had to request data or search through spreadsheets to find what they needed.

Investor reporting. Investment staff needed to manually build reports each quarter, even though the same data was used for multiple reports. This was inefficient and time-consuming.

Solution

iLEVEL consolidates the data into a single source of truth that is always up to date, accessible, trusted and secure. All numbers can be traced to the source with a click.

iLEVEL stores all portfolio data in the cloud, where it can be securely accessed from any location on a laptop or tablet device.

iLEVEL enables Charlesbank to provide secure, online access to customized dashboards that present critical data in a visually engaging format.

With iLEVEL, investor reports are template-driven, which means that staff can generate a report in a fraction of the time by simply refreshing the data.

“There are a million things you can do with iLEVEL and we continue to discover new ways of using it. There's endless potential.”

Result

iLEVEL has enabled Charlesbank to streamline key operations and gain a new level of visibility into their portfolio data.

“We can access and analyze the data in formats that previously would have been impractical to generate on a regular basis,” said John Fiyod, CFO at Charlesbank. “We pull current ROI, base case ROI, current EBITDA, forecasted EBITDA, total dollars invested, cumulative capital returned and current market value directly from iLEVEL every week for our staff meeting.

Our investment staff can access critical data at any time on a portal. And we know the data is always consistent and reliable.”

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