

# Client Overview



**Automating Operating Metrics Reporting for Scalable, Error-Free LP Communications**

A leading private equity firm faced increasing pressure from Limited Partners (LPs) for more frequent, detailed portfolio performance reports. Their existing manual process was slow, error-prone, and resource-intensive. They turned to Brownloop for our consulting services, looking to automate data handling, streamline reporting, and create scalable, efficient solutions for LP communications.

## Client Challenges

### Increasing LP Reporting Demands

LPs required more frequent and detailed reports, increasing pressure on the firm to automate and streamline reporting processes.

### Manual, Time-Intensive Reporting

Manually collecting and compiling data was slow and resource-draining, consuming significant BI Finance team capacity.

### Cross-System Entity Mapping Issues

Data was fragmented across systems like Chronograph and Anaplan, with no common identifier, making it difficult to reconcile and map consistently.

### Data Quality, Granularity, and Metric Standardization Issues

Manual processes led to inconsistent data definitions, missing metrics, and incorrect granularity (e.g., company-level data instead of investment-level). Varying operational metrics made it difficult to standardize KPIs.

### Continuation Fund Coverage Issues

Chronograph didn't capture the necessary fields for continuation fund investments, preventing the firm from scaling the solution to include these funds without additional customizations.

### Scalability Constraints

The existing solution couldn't easily scale to accommodate unique reporting requirements from certain portfolio companies, creating challenges as the firm expanded its investments.

## Brownloop Solution

Brownloop's team, which specializes in consulting for private equity, implemented a structured approach focusing on data integration, automation, and reporting optimization. The team standardized data through master tables, automated data flow with Fivetran and Snowflake, introduced AI-powered reporting, and created scalable infrastructure to meet the firm's growing LP reporting demands and future needs.

### Master Data Architecture

Created a unified data model with unique identifiers to ensure consistency across all systems, eliminating data fragmentation and errors.

### Automated Data Integration

Implemented a data integration layer using Fivetran and Snowflake, automating data flow with incremental feeds for real-time operational visibility and full refreshes for structural integrity.

### AI-Powered Reporting and Insights

Automated reporting using AI-driven tools and Power BI, enabling real-time, interactive dashboards and self-service reporting for faster decision-making.

### Scalable Infrastructure with Safety Net

Designed a scalable solution with Snowflake for future growth and staging layers to retain historical values, enabling audit capabilities and rollback options.

### Export Format Optimization

Optimized LP-ready export formats, making reports easily accessible and increasing adoption among LPs, driving greater value realization.

### Workarounds for Source System Limitations

Addressed source system constraints (e.g., Chronograph's metric granularity) early on, ensuring that the architecture could scale and handle unique reporting needs.

## Value-Driven Results

### Eliminated Manual Data Compilation

Automation removed manual data gathering, reducing errors and operational burden.

### Reduced Reporting Cycle Time

Reporting time was cut from days to hours, enabling quicker decision-making and meeting LP demands.

### Standardized Quarterly Reporting

Standardized format streamlined reporting and ensured LP requirements were met consistently.

### Increased BI Finance Team Capacity

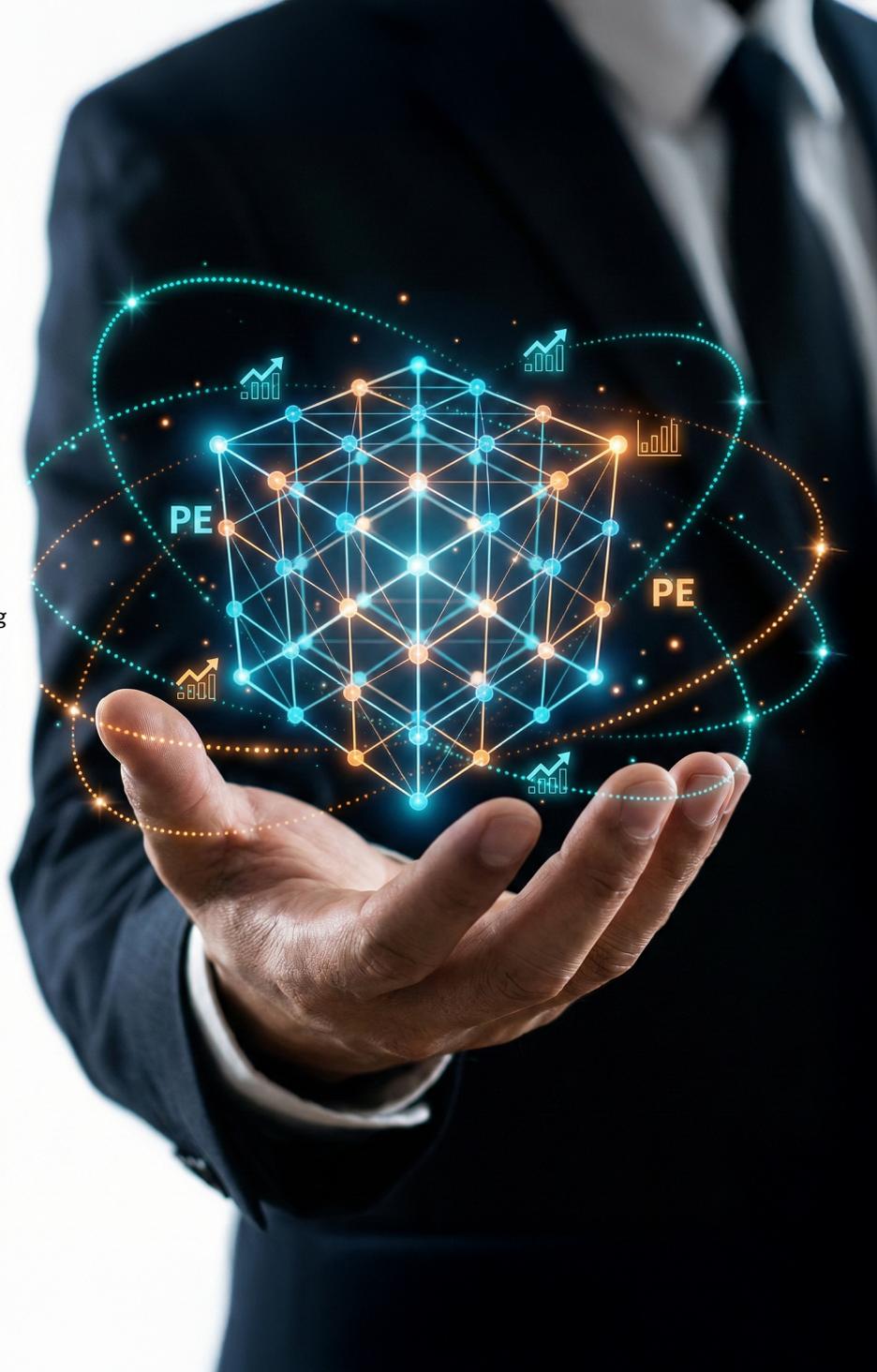
Automated repetitive tasks, which allowed the BI Finance team to focus on strategic initiatives.

### Improved Data Transparency and Credibility

Improved data accuracy with automation and enhanced trust with stakeholders and LPs.

### Enhanced Scalability for Future Growth

Enabled scalability for future growth, accommodating expanding data volumes and evolving LP reporting needs.



## Conclusion

By automating data integration and reporting processes, Brownloop helped the client eliminate errors and meet the increasing LP demands. The solution improved operational efficiency, freed up team capacity, and ensured scalability for future growth. This transformation empowered the firm to deliver faster, more accurate insights, supporting better decision-making and long-term success.

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