

CASE USE

PRIVATE EQUITY & VENTURE CAPITAL FIRMS

Schedule Portfolio Reporting

DYNAMIC REPORTING SOLUTION

Track and report portfolio results easily

The due diligence is done. You've made the choice to invest in a company. Now is the time to define clear reporting expectations that help support them and protect you and your investors.

HOW IT WORKS

- Create portfolio company onboarding and reporting forms
- Capture form submission in both a Portfolio and Reporting database
- Easily search, analyze and share portfolio information
- Prepare one-page internal tearsheets for each portfolio company
- Produce custom one-page investment updates for limited partners

AUTOMATE GATHERING INFORMATION

"Set and forget" monthly reporting

Consistent and frequent portfolio company reporting is a must to add value to your portfolio. When everyone stays informed, everyone can keep the investment on track. Pitchly's automated process means you no longer spend time gathering information. Instead, you can benchmark new opportunities, analyze monthly information to prepare questions for the portfolio companies, and prepare beautiful Office-supported outputs for insertion into your limited partner communications.

HOW IT WORKS

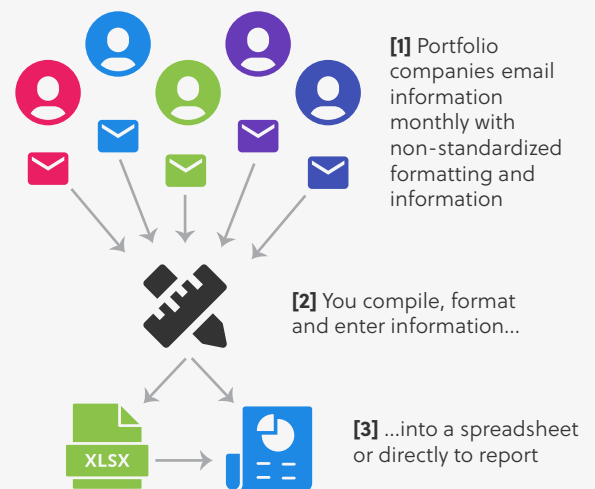
- Create a **Monthly Reporting Form** to collect portfolio company financial statements and KPIs
- Schedule a monthly email reminder to portfolio companies requesting they complete the Form
- Approve their submissions for entry into the database for analysis and benchmarking
- Export the information into Excel as your internal dashboard
- Design one-page limited partner portfolio updates linked to form submission data
- Export a one-page portfolio update for each company in PowerPoint

TRUSTED BY SMALL AND BIG FIRMS



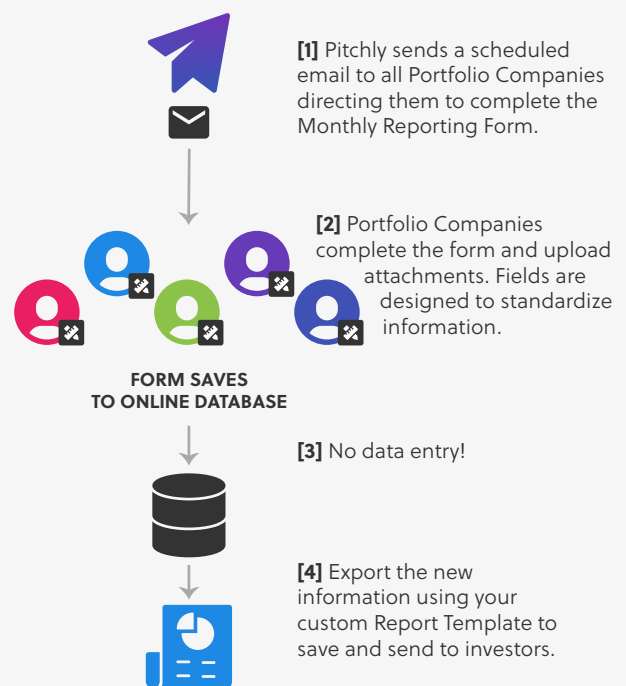
TYPICAL MONTHLY PROCESS

Gathering, compiling, and formatting investment reports is time-consuming and tedious for your team and portfolio companies.



PITCHLY PROCESS

No more data entry and report building!






FORM EXAMPLES

Onboard with Clear Reporting Expectations

Once a new investment is made, send the **Onboarding Form** to the company to gather marketing information for your website and social media team, including quotes, logos, headshots, and other collateral required. Then include the company reporting contact in the scheduled **Monthly Reporting Form** email.

NEW INVESTMENT ONBOARDING

Enter a new "Portfolio Company" to your Portfolio Database by sending a form with all the relevant information needed on file. Once they complete the form, it is saved to the database, and you'll never need to request it again.

ONBOARDING FORM EXAMPLE
COMPANY NAME
SHORT DESCRIPTION FOR WEBSITE
INDUSTRY
NAME OF CEO/FOUNDER
CEO/FOUNDER EMAIL ADDRESS
CEO/FOUNDER PHONE NUMBER
LOGO VARIATION 1
 UPLOAD IMAGE
LOGO VARIATION 2
 UPLOAD IMAGE
FOUNDER HEADSHOT
 UPLOAD IMAGE
WEBSITE
NAME OF CFO OR INDIVIDUAL FOR MONTHLY REPORTING
EMAIL OF CFO OR INDIVIDUAL FOR MONTHLY REPORTING
PHONE NUMBER OF CFO OR INDIVIDUAL FOR MONTHLY REPORTING

PORTFOLIO MONTHLY REPORTING

Next, create a **Monthly Reporting Form** in the Reporting Database with the required information. Fields are built to normalize the data by forcing text, date, currency, or number entries – even attach files. The new company will report on the monthly schedule and your work is done. Now you just wait for the results to come in each month!

PORTFOLIO MONTHLY REPORTING FORM EXAMPLE
DATE OF SUBMISSION
REPORTING MONTH
REPORTING YEAR
NO. OF CUSTOMERS
END OF MONTH CONTRACTED ARR
BILLED ARR
ARR BOOKINGS FOR MONTH
GROSS DEBT
CASH BALANCE
NO. OF EMPLOYEES IN STATE
OUT-OF-STATE
ATTACHMENTS
INCOME STATEMENT
@ ATTACH FILE...
BALANCE SHEET
@ ATTACH FILE...
CASH FLOW STATEMENT
@ ATTACH FILE...
DESCRIBE REQUESTS OF INVESTORS, IF ANY
ADD INVESTOR COMMENTARY, IF ANY

Report in minutes – not hours

Discover how other private equity and venture capital firms use Pitchly to access and manage data to get critical work done faster.

REPORTING SIMPLIFIED 



Find us | pitchly.com
Email us | info@pitchly.com

Tweet us | [@pitchlyinc](https://twitter.com/pitchlyinc)
Call us | +1 800 484 2415