

sitePilot Financial Performance Manager

Completely automate financial performance reporting

Create print-quality PDF products sheets automatically from financial performance data

Instantly update charts and tables in your corporate website and email communications

Ensure that your investors keep abreast of your latest performance numbers better and more accurately than before

Add new funds and investment products to the automated reporting process, quickly and easily, to reflect the needs of your growing business

Simultaneously deploy your performance charts and tables in multiple languages to reach an international audience

What is sitePilot Financial Performance Manager?

sitePilot FPM is a tool that completely automates the process of creating and distributing professional looking online and print-ready PDF financial performance reports. By automating the reporting process, it significantly reduces your administrative workload and the possibility for error, which saves you time, money and effort. sitePilot FPM represents a superior way to manage the reporting of your performance numbers and investment commentary.

Who uses sitePilot?

sitePilot is used to manage content by companies across a range of sectors and their unique needs.

sitePilot is being used by over 60 companies in North America, Europe, Asia and Australia today, including investment firms, manufacturers and distributors and not-for profit organizations.

Why choose sitePilot FPM?

sitePilot FPM is a cost-effective, scalable system that automatically generates professional looking charts and tables in your website, emails, and performance documents, saving you substantial time, money, and effort - often 'paying back' within three months.

Save time

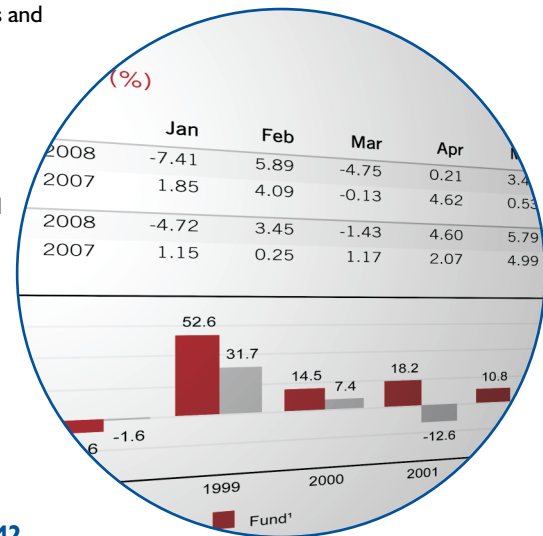
sitePilot FPM instantly updates charts and tables in your corporate website, email communications and for-print documents - significantly reducing the workload required to produce performance reports and freeing up your time to focus on other business.

Improves accuracy

sitePilot FPM protects the integrity of performance numbers because it extracts performance data from a central database, thus reducing the opportunity for error.

Scalable

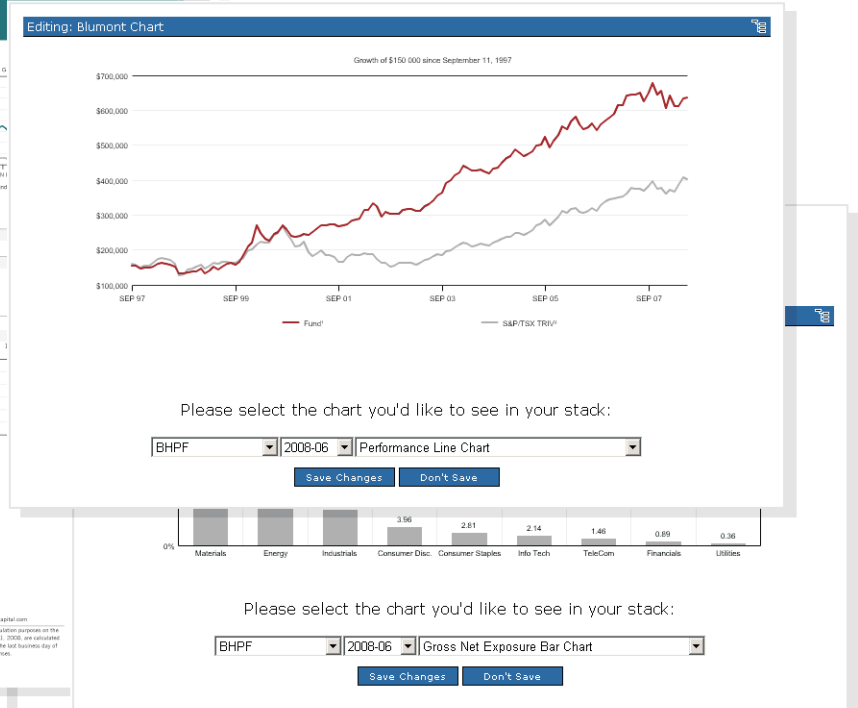
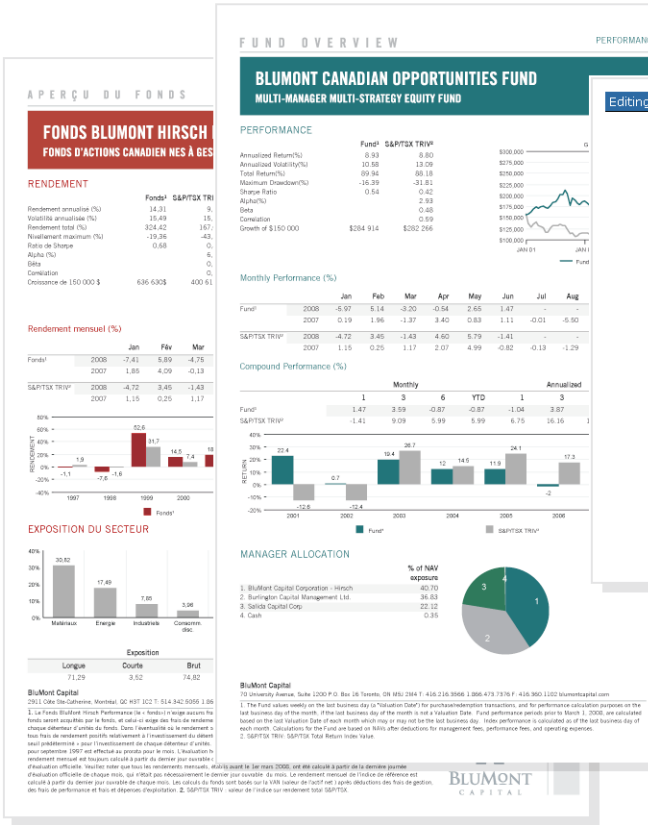
As your business grows, you can add new funds and investment products and simultaneously deploy your performance charts and tables in multiple languages.



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How does sitePilot FPM work?

sitePilot FPM is provided as an ASP solution, which means that it is software delivered online, on demand and without any infrastructure costs to you.

It can be integrated into your existing website or as a component of a website designed by Shrinking Planet's innovative design team. Admin Access is provided online through a secure login and can be managed from any workstation with access to the web.

sitePilot FPM generates performance charts and tables for every fund based on data it extracts from a central database. This database is updated via FTP using performance numbers provided in MS-Excel or Tab delimited format

An online program will run to generate charts and tables, instantly making them available to your PDF performance documents, corporate website, and email broadcasts.

Product Features

Centralized data management

Import your own data to a central database that outputs it to multiple channels of communication, including your website, email broadcasts, and PDF cut sheets.

Automatic updates

An online program regularly updates your performance charts and tables.

Custom charts and tables

Generate customized charts and tables, specify historical points in time, introduce new variables, and more, to fulfill your performance reporting needs.

Expandable

Integrate with Shrinking Planet's Website Content Management System and Email Campaign Manager to allow for immediate transfer of performance data into your website and email broadcasts.

Multiple languages

Deploy your performance charts and tables in multiple languages to reach an international audience.



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Are you ready to take the next step?

Contact us by calling 416-597-6849
or email nextsteps@shrinkingplanet.com