

upSWOT technology is used by 200+ banks and financial institutions, helping them build loyalty and improve relationships among their SMB clients. The platform is a white-label embedded business management enhancement for the business customers.

The solution empowers business customers with data-driven embedded finance tools like business credit score boost, actionable insights, cash flow forecast, business valuation, benchmarking, ESG, underwriting, and a lot more.

Trusted by the best

Partners

Clients

Q2

wipro

avalog

Finicity

pwc

ENVESTNET Yodlee

Republic Bank

CREDITSUITE

Mphasis

FINASTRA

MX

temenos

standard chartered

Small Business Finance

Nota

First Southern National Bank

Banno

Alkami*

jack henry

NCR*

ION DIGITAL

LexisNexis

mastercard

OMB

+ 6 others

*Default solution for all Alkami's Banks, Credit Unions and pre-integrated with NCR

creditsafe

ondeck

EMPRISE BANK

iCapital

BankTech VENTURES

AltBanc

Sunwest Bank

LCF

+100 others

Powered by data sources

upSWOT enables business customers to connect their data for continuous API-enabled access to 100+ business-critical apps. Data is aggregated in real-time from apps and mixed with transactional data coming from banking cores. Thousands of signals are analyzed to help small and mid-sized companies better understand the health of their businesses.

eCommerce

CRM

Accounting

bigcartel

shopify

amazon

insightly

zoho CRM

HubSpot CRM

zoho

sage

quickbooks

SQUARESPACE

ebay

salesforce

pipedrive

FreeAgent

FreshBooks

Square

wave

xero

100+ API-enabled business apps

FIS

TEMEN

fiserv.

jack henry



Alkami

NCR

Q2

FINASTRA

Product value

Banks and FIs:

- Increases digital banking **engagement** and SMB customers' **stickiness**.
- Provides FIs with a deeper understanding of their business users and offers customized **up-sell** and **cross-sell** opportunities.
- Speeds up the loan underwriting** process by pulling information directly from the business's accounting system.
- Offers a **marketing automation** feature, allowing relationship managers to provide clients with solutions they need before they know they're needed.
- Initiates **automated campaigns** and notifies relationship managers about new opportunities and risks, helping the banks become more supportive, proactive, and sales-efficient.

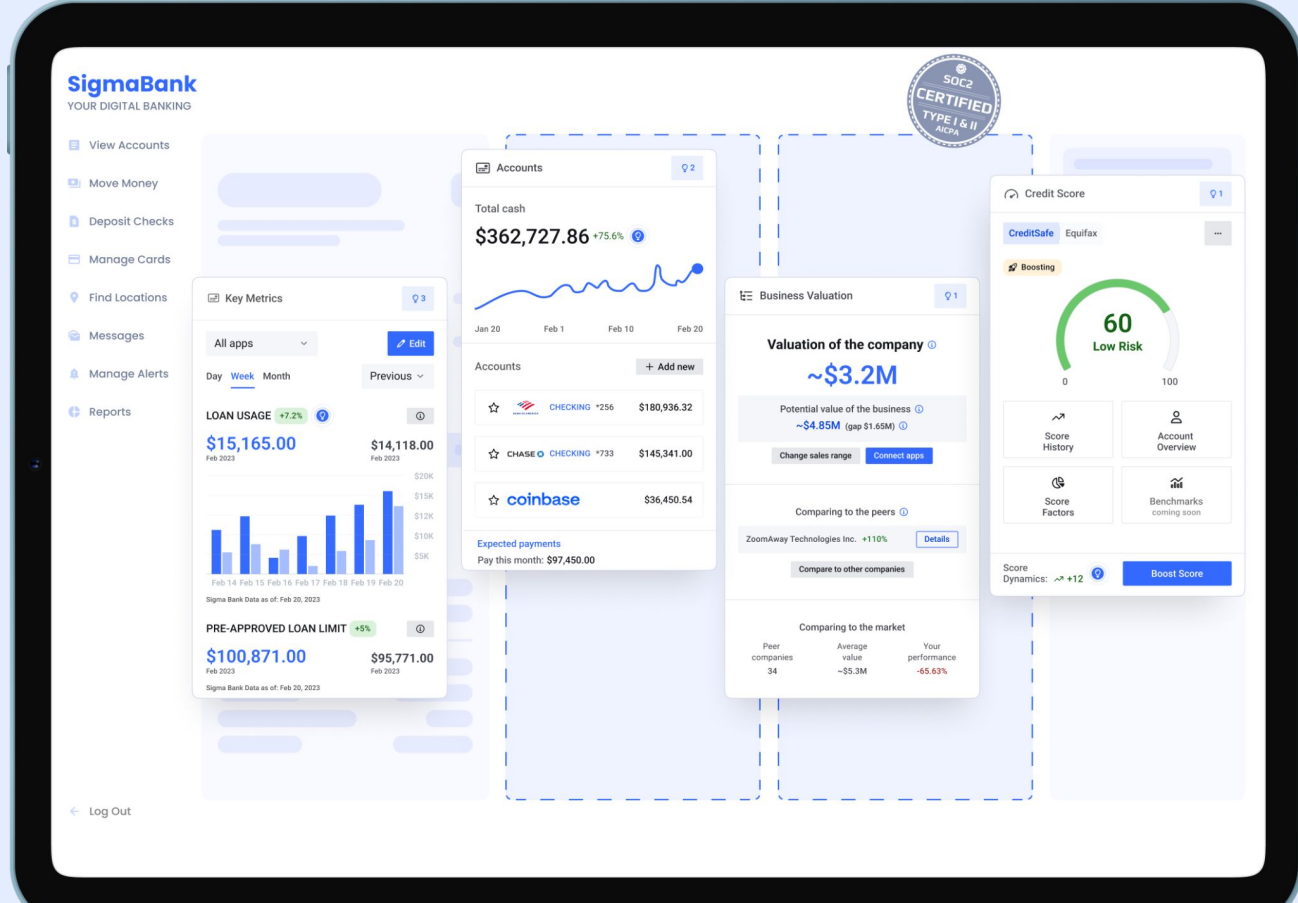
Small and medium businesses (SMBs):

- Organizes SMB data across business-critical SaaS applications and delivers **real-time business insights** and **personalized recommendations**.
- Helps SMBs grow their businesses and make better decisions by **monitoring financial, sales, and marketing data**.
- Empowers SMBs to **boost and monitor** their **business credit scores** from their financial portals.
- Accelerates SMBs' **access to funds**.
- Provides SMBs with embedded finance tools**, such as cash flow management, business valuations, forecast builders, and bank reconciliations, to help them grow and scale.

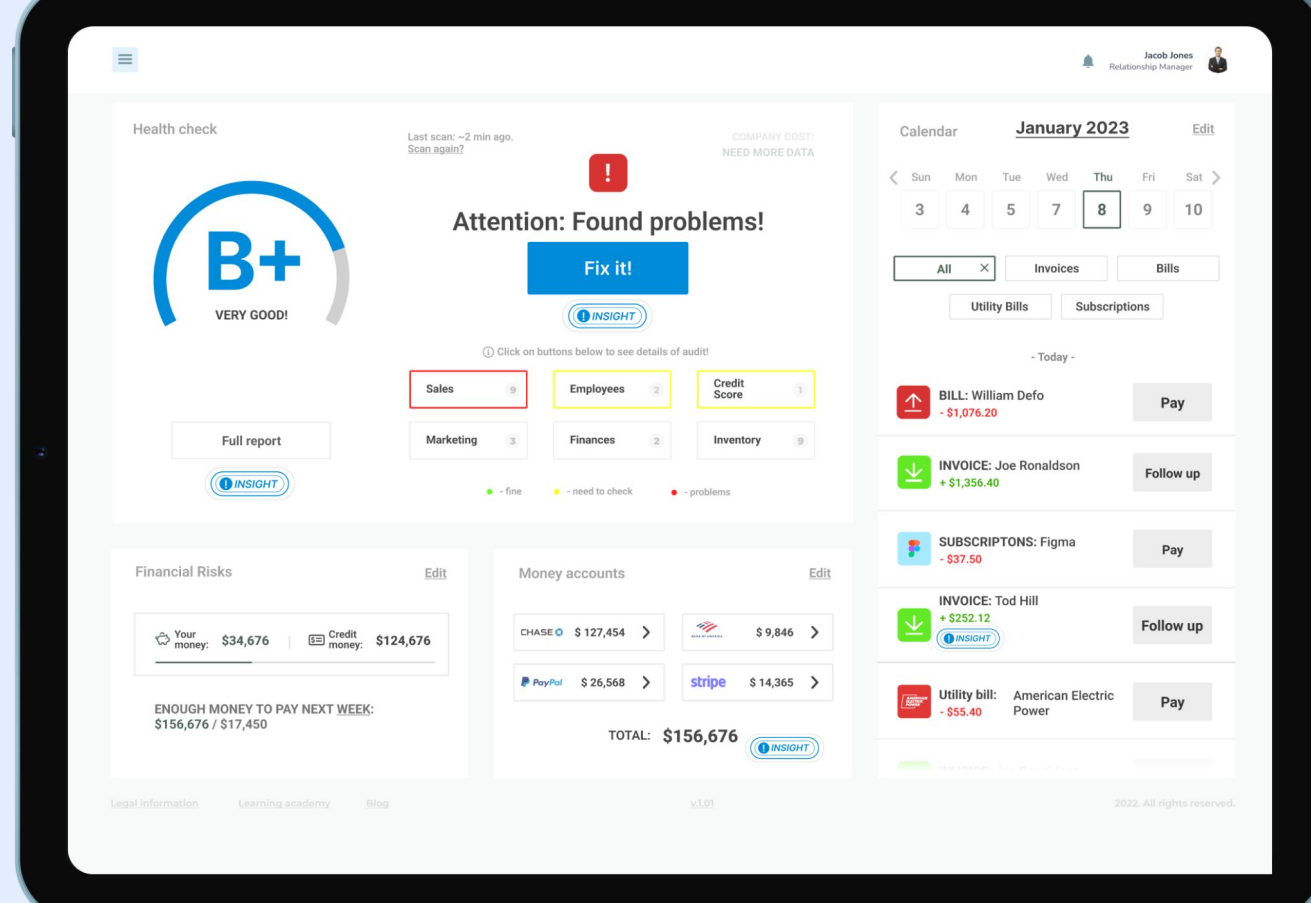
Deployment options

A versatile embedded business management enhancement for online/mobile banking

A standalone solution



Widgets (only three lines of code or iFrame (SSO) or RESTful APIs.



It doesn't demand any integration and takes only TWO days to launch.

"upSWOT's consolidated business data and actionable insights create a unique win-win situation for financial institutions and their SMB customers." - **Alex Keltner CEO, First Southern National Bank**