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

- Q2
- US Bank
- BB&T
- CHASE
- Bank of America
- +6 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.

Product value

- ✓ 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.
- ✓ Accelerates 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 roles, helping the banks become more proactive, supportive, and customer-efficient.

Banks and FIs:

- ✓ Organization of SMB data across business-critical SaaS applications and delivers real-time business insights and personalized recommendations.
- ✓ Helps SMBs grow their businesses by making better decisions by monitoring financial, sales, and marketing data.
- ✓ Empowers FIs to boost and monitor their business credit scores from their financial portal.
- ✓ 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