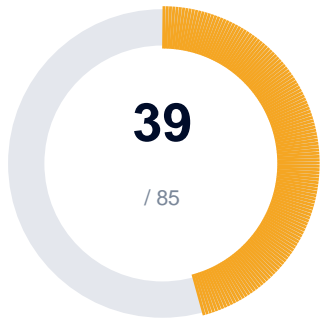


Diagnostic Report

A synthesis of your firm's operational capabilities across six key domains.

SAMPLE REPORT

<p>STRATEGY</p> <p>Private Equity</p>	<p>AUM RANGE</p> <p>\$2B – \$3B</p>	<p>TEAM SIZE</p> <p>25 – 50</p>	<p>SYSTEMS</p> <p>4 systems</p>
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REACTIVE INFRASTRUCTURE

Reactive Infrastructure

Basic systems exist but operational workflows remain fragmented. Significant efficiency and accuracy gaps persist.

PEER BENCHMARKING



EST. OPERATIONAL IMPACT

<p>\$1.8M – \$3.5M</p> <p>Annual Cost of Inefficiency</p>	<p>12 – 18</p> <p>Hours Lost / Week</p>
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<p>Elevated</p> <p>Operational Risk Level</p>	<p>46%</p> <p>Score Normalized</p>
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Category Breakdown

Detailed question-level breakdown of your operational domains.

Investment Data Architecture
REACTIVE
[7/15]

Where does your portfolio and investment data primarily live?

— *Internal systems with heavy spreadsheet use*

How long does it take to answer a complex portfolio question?

— *1–2 hours*

How often do data discrepancies appear across teams?

— *Often*

Capital Activity & Fund Operations
FRAGMENTED
[6/15]

How are capital contributions and distributions tracked?

— *Spreadsheet plus administrator reports*

How long to reconcile fund activity after a reporting period?

— *1–2 days*

How easily can you see capital activity across all funds in one pl...

— *Requires manual compilation*

Investment Team Intelligence
REACTIVE
[7/15]

How quickly can investment teams analyse portfolio performan...

— *Several hours of work*

How accessible are key investment documents (LPAs, models,...

— *Indexed document systems*

How frequently do teams duplicate analysis already performed...

— *Often*

Operational Efficiency

REACTIVE

[7/15]

How many hours per week does a senior team member spend c...

— 10–15 hours

How often are multiple teams reconciling the same data?

— Monthly

What percentage of your reporting workflow is manual?

— 60–80%

Governance, Risk & Data Security

REACTIVE

[8/15]

How easily can your firm audit how a number or metric was ge...

— Partially traceable

How confident are you in your firm's data security across inves...

— Good

How dependent are operations on specific individuals?

— Frequently dependent

Reporting & LP Communications

FRAGMENTED

[4/10]

How long does LP reporting preparation typically take?

— 1–2 weeks

How easily can your team generate ad-hoc insights requested b...

— Requires manual modelling

IMPROVEMENT ROADMAP

Your Path to Operational Intelligence

Based on your diagnostic, a prioritised three-phase programme to close your operational gaps and reach best-in-class performance.

PHASE 1 Data Consolidation

Weeks 1–4

- Connect portfolio data, models, capital activity, and documents into a unified environment
- Establish role-based access controls, data governance, and audit trail infrastructure
- Ingest and index unstructured documents across shared drives, inboxes, and data rooms

PHASE 2 Operational Intelligence

Weeks 4–12

- Enable teams to query investment data and documents instantly via natural language
- Automate capital activity reconciliation and fund reporting workflows
- Activate real-time portfolio performance monitoring and early warning alerting

PHASE 3 Automated Insight Generation

Weeks 12–24

- Transform operational data into explainable, citable intelligence for LPs and IC
- Deploy AI-assisted LP reporting, ad-hoc query responses, and investor communications
- Embed institutional memory firm-wide — making knowledge searchable and persistent

Ready to see your firm's real score?

Take the free diagnostic at finela.ai/diagnostics — 21 questions, 3 minutes, instant report.