Unframe

CLIENT
Leading Private Equity Firm

DEPLOYED
Phased rollout across teams within 1 quarter

DESCRIPTION
AI reporting solution that automates data extraction and normalization, delivering accurate, traceable reporting across 500+ portfolio companies.

THE IMPACT

98%+
ACCURACY, SURPASSING HUMAN ABSTRACTION BENCHMARKS

70%
FASTER INVESTOR REPORTING CYCLES

2B+
DATA POINTS PROCESSED QUARTERLY

CHALLENGE

Portfolio companies submitted monthly, quarterly, and annual reports in inconsistent formats. Internal teams were forced to manually normalize and extract data from thousands of rows in Excel - repetitive, error-prone, and time-consuming work. Prior AI-based automation attempts failed to meet accuracy and reliability needs, creating a major operational bottleneck with no scalable path forward.

THE SOLUTION

Unframe delivered an AI solution that extracts and normalizes structured data from unstructured Excel reports, provides editable context suggestions, confidence scores, and full traceability for user fine-tuning, and integrates directly into their reporting workflow with outputs connected to Power BI. A phased rollout minimized disruption and maximized adoption across teams.

In a data-rich, high-stakes environment, Unframe's underlying technology made it simple to deploy a production-grade AI reporting solution with speed and accuracy.

"By automating reporting with Unframe, we've achieved accuracy levels beyond human benchmarks and eliminated a major bottleneck. The success of this rollout is creating strong momentum for expansion across additional teams and portfolio companies."

Senior Executive, Leading Global Private Equity Firm