

# upSWOT Partners with Cion to Provide Data-Driven Embedded Finance Tools to Help Commercial Loan Brokers Better Serve SMB

CHARLOTTE, NC, USA, November 21, 2022 /EINPresswire.com/ -- Cion, offering an intelligent curation platform matching business owners to the right loan products that meet their unique financial needs and objectives, will form a partnership with upSWOT, a data-driven platform offering SMBs the embedded finance tools they need to succeed financially. This partnership will

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*Dmitry Norenko, CEO of  
upSWOT*

ensure that wealth managers and commercial loan brokers have the sophisticated financial technologies necessary to give their SMB customers the keys to modern financial success in the digital age, and in doing so, build stronger relationships with those customers.

By working together, upSWOT will support Cion’s institutional clients in providing their SMB customers with

powerful embedded business management and embedded finance tools, all built on the industry’s most sophisticated data processing technology. This technology enables SMB customers to connect data from 200 API-enabled apps of all kinds. These applications include popular accounting, ERP, payroll, e-commerce, CRM, marketing, and POS business applications.

This will help Cion’s institutional clients better manage their customer relationships, by getting timely managerial insights across their portfolios and making it a snap to offer timely support and relevant financing at the right time in an SMB’s customer journey. Here are some of the innovative embedded finance and embedded business management tools that institutions will be able to offer SMB customers as a result of the upSWOT - Cion partnership:

- The credit boost tool enables businesses to share data with credit bureau(s), which then boost their credit score as appropriate. Sharing proprietary data never causes a decreased credit score.
- The insight generator tool cross-analyzes multiple app data streams to generate specific actions the business can take to improve their operations and profitability. Businesses will also get access to associated real-time analytics.
- The cash flow forecast tool will give businesses the ability to see their expected cash inflows, and the sensitivity analysis tool will help them understand the future impact of key possible decisions.

- The bank reconciliation tool auto-posts and categorizes all of the business's transactions from their bank feed to their accounting app, allowing for rules to be set up to improve accuracy.
- The cash management tool gives businesses access to all their banking accounts (including accounts in different banks) as well as drill-down into transactions. This tool also aggregates all of the business's invoices, bills, subscriptions in one place, and provides notification of upcoming amounts due.
- The business valuation tool gives businesses a valuation and estimate of market value, as well as the numbers and metrics that affect it. Results can also be compared with those of public companies.
- The funding access tool allows businesses to access credit products tailored to their current needs.
- The ecommerce management tool connects to POS and ecommerce apps and ensures that every step of the ecommerce transaction is tracked and performed on schedule, and provides sales analytics and insights.

Cion brings to the partnership great relationships with forward-thinking institutions that understand the value of technology in better serving SMB customers' financial needs. By already using Cion's financial technology platform, they are in the perfect position to take advantage of the embedded finance and embedded management components that upSWOT will integrate into Cion's platform. Cion also brings to the table its commitment to innovation and enabling institutions to build better relationships with the customers they serve through the power of technology. The Cion - upSWOT partnership is a story of two platforms which combine to create more than just the parts, but a truly holistic fintech solution.

"Fintech has incredible power to dramatically reshape the success of SMBs," observes upSWOT CEO Dmitry Norenko. "The institutions that enable SMBs to take advantage of these dramatic shifts in technologies are institutions that care about their customers and ensuring that they will still be here in a decade. Our partnership with Cion will empower institutions to steward the future of their SMB customers by ensuring that they have access to the best tools the fintech sector has to offer. We are proud that our partnership with Cion brings together the best minds, expertise, and resources in the industry to produce this outcome for SMBs. Ultimately not only will the SMBs be bolstered, but also the economies that flourish around them."

"Cion Digital is focused on using data and machine learning to help financial advisors and commercial loan brokers secure financing for their clients that meets their clients' unique financial objectives and curate high-value relationships for lenders and financial institutions," says Taylor Adkins, Chief Product Officer at Cion Digital. "Our partnership with UpSwot will give us access to hundreds of data sources and next-generation insights we can use to more intelligently match business owners to the financing they need, when they need it, and enable our customers to expand their digital offering with on-demand embedded finance and business management tools."

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## About upSWOT

upSWOT is a fintech platform that service providers with SMB customers can offer through their online portal, in order to offer those customers data-driven embedded finance tools. These tools offer real-time SMB performance data, trends and insights. The upSWOT platform, with connections to 200 SaaS products used daily by small and medium sized enterprises, is a powerful add-on to digital banking offerings."

For more information, please visit <https://upswot.com/>

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## About Cion Digital

Cion Digital helps financial advisors, commercial loan brokers, and lenders create and expand high-value customer relationships through Cion's intelligent curation and distribution platform. Cion uses data and machine learning to match potential borrowers to the right loan products and the right lenders based on the borrower's unique needs and financial objectives, and the lender's unique credit requirements and ideal borrower characteristics.

For more information, please visit <https://www.ciondigital.com/>

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## Media Contacts

Katie Robinson  
Chief Marketing Officer, Cion Digital  
[katie@ciondigital.com](mailto:katie@ciondigital.com)

Nana Mardoyan  
Head of Digital Acquisition, upSWOT  
[email us here](#)

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