

# Rockport CORE Pipeline | White Paper

At Rockport, we've been around the block. Founded by Rick Trepp, Founder of Trepp®, and in business for over 21 years, we're a unique combination of commercial real estate pros and the best technology teams & tools in CRE Tech. Many of us have lived through the burden of decentralized data stuck in terabytes of Excel workbooks stored offline, where aggregating information for reporting – and report building – is all done manually.

It's this industry experience that drove the development of **Rockport CORE**. The industry-leading, enterprise-class commercial real estate SaaS platform for loan origination → underwriting → reporting securitization → asset management and portfolio management, which features the industry standard, fully integrated Excel Underwriting workbook that provides analytics for all CRE property types and the most complex debt/property structures.

We know that not every CRE lending operation can tackle the implementation effort or investment that Rockport CORE requires, however, we also know that many CRE lending operations understand the benefits of such an enterprise class platform. For these folks, we have the answer:

**Rockport CORE Pipeline – the magic of an Excel-based, centralized CRE lending Pipeline, without the heavy tech lift & price tag.**

## When it comes to Commercial Real Estate Finance & getting deals done, we know you need:

- Centralized visibility across the sales team to current, up-to-date deal/opportunity data
- To Live in Excel! Let's face it: deal teams want to work in Excel. With CORE Pipeline, you get the best of both worlds – a flexible Excel Pipeline that synchs to the database for reporting & archiving
- Fast decision making
- Freedom-from time spent on administrative tasks to maintain standalone spreadsheets and offline files, to spending time talking to potential customers, tracking your pipeline in real time, and analyzing real estate
- Auto-generated Pipeline reports that provide instant insights into loan status, pipeline strats, broker & production sources, hit rates, and borrower/sponsor exposures

## With Rockport CORE Pipeline, clients benefit from:

- Cloud-based (SaaS) central database system
- HOME DASHBOARD that visually presents a snapshot of the pipeline, with drill-throughs to underlying data + single click 'Favorite' access to key deals & reports; and an interactive (Tableau) pipeline map
- Excel-based Integrated Pipeline Tool – for 2-way edits/updates of the Origination Team's deal data Results in streamlined Pipeline meetings – one person making updates, updated deal data visible to the team in real time
- Report library (SSRS-based) – a suite of pipeline reports encompassing pipeline status, exec summary, pipeline strats, legal entity exposures, and deal team strats
- Ad Hoc Reporting Tool – write your own database queries – from pipeline reports to geographic exposures, i.e., 'What is the impact of the storm on the pipeline?'
- Interactive Excel Closing Statement
- Full audit trail – track “who updated what, when?”