



Phundex User Tips - What can you do on the Phundex Platform?

One of our clients recently asked for some tips on what they could do on the Phundex platform. We talked about simplifying the way they work and streamlining processes in general terms, but then she asked for suggestions on what sorts of things she could manage using Phundex.

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We designed Phundex to work for any type of business, no matter the sector or location, but it's particularly well suited to those working within the investment lifecycle due to the data permissions, version control and audit history. We also wanted it to be a single place to manage all processes and transactions, because who wants to have multiple systems, each geared to a particular part of your business?

We've created a list of some of the things we've seen Phundex used for:

Internal processes

Human resources – Structure an HR Department, Recruitment, Onboarding, Training, Offboarding

Setting up a new Human Resource Function? We've created a Pathway to guide you through some of the things you need to set up an HR function, which you can customize to suit your requirements.

You can use Phundex to manage the recruitment process, set up an onboarding process, manage new employee inductions and account set-up, and create a Data room with all the employee's relevant documents, giving the employee temporary access to provide the documents instead of having to email them to you.

You can also create a training Pathway so that all new employees have access to your policies, human resources manual and training materials.

Keep a record of all training courses undertaken and all systems to which the employee has access. If you need to offboard the employee, you'll have a complete list of all the systems that need their access removed, making things much simpler,

Governance processes – Board & Investment Committee Meetings, Regulatory Liaison, Data Protection

Your business may need to hold regular Board or Investment Committee meetings or manage meetings with your regulator, auditor, etc. Phundex is the ideal place to structure and build the material for each of these meetings, and to track action points and next steps. You can even set up regular repeating tasks. If, for example, you have a bimonthly investment committee meeting and need various people to provide updates, you can set up a



repeating Task to email them before the meeting to request they provide the update. Create the Task once, decide how often it needs to be repeated and on what date, then assign it to the relevant Team Member. Phundex will look after reminding them for you, and the documents you need will be available in the Data Room so it will be easy for you to assemble the material for each meeting.

Worried about data protection? We've got checklists for you to manage both data protection and data sharing. We're even working on a data processing Pathway for you, based on the OneDPA template, created by the same folks as OneNDA.

Financial Control

You might be looking for a more structured way to manage financial control. You can manage monthly financial control processes, your annual financial cycle, or even getting ready for your annual financial statements and auditor meetings. We've got a couple of pathways you can start with, streamlining or expanding to meet your internal processes.

Business Risk Management

Most businesses have some risk management process, but we thought having a structured approach would make it easier for you to manage the end-to-end process of identifying and establishing risk mitigation strategies and process using our Business Risk Management Pathway.

Business Transactions

The range of transactions and activities you can manage on Phundex is limited only by how you run your business. You're an asset manager for fund/fund administrator and you want to onboard a new client? Want to buy a business or assess an investment opportunity? Run a detailed due diligence process? Run an asset-based, commercial or property-based lending business and what to manage each of the steps in the cycle? Do a lot of NDA's and want a streamlined way to manage the process and have them accessible to the right Team Members? Getting ready to do an equity raise? We've got Pathways for all these too.

Innovation Hubs, Incubators and Start-ups

We've got an innovation management system that will work for any type of innovation hub or incubator and several Pathways that will help start-ups create a detailed business plan and get ready to raise equity.

For a complete list of Pathways, you can see an earlier article we published here: [Phundex Updates Pathway Templates – August 2023](#)



You can find more articles on our website, at [Phundex Resources](#), on LinkedIn at [Phundex LinkedIn](#), or for other questions, please email us at: hello@phundex.com.

To book a demo or for a trial, you can either use the link on our website or email support@phundex.com, and they will be happy to set it up for you.