



Presales phase

- Client needs discussion, presentation and demonstration
- Optional: Demo access with free training
- Optional: Proof of Concept
- Contract and project scope finalization

Implementation phase 1

- Setup / parameterization
 - Depository banks data feeds activations / setup
 - Master data import / upload (clients, portfolios, positions)
 - Training
- ➔ The Client is up & running for the day to day

Implementation phase 2 (priorities defined by the Client)

- Personalization and constant functionalities enrichment
- Daily support and quarterly steering committees