



Customer Journey Overview

01 Pre-Sales



Engage with our expert-level business-analysis and technical-solution consultancy.

- We will discuss with you in great detail the specific needs and pain points of your family office.
- Present you with a custom demo of the platform based on your own set of sample data.
- Provide you with access to your own demo environment, so that you can acquire a first-hand experience with the platform.
- Deliver an implementation and production proposal tailored to your family-office needs and goals.

02 Getting You Up and Running



Create an effective implementation and roll-out plan in close collaboration with our professional team.

- We will closely analyze your business process and data to create an effective data seeding and software configuration model that best suits your business practice.
- Load and reconcile your data by running daily data verification processes.
- Drive faster adoption with a custom change-management and training program for your users.

03 Running Live



Extract maximum value from your new platform and reach your business goals with the continuous support of your new partner.

- We will provide assistance and resolve issues fast with 24/7 access to our support team.
- Offer value-added services such as report writing, data entry and cleaning, integration with external systems and periodic reconciliations.
- Continue adding custom features to the platform to accommodate your changing business requirements.