

SWIP

Easy access & smooth on-boarding



Client Meeting

SWIP presentation of all features incl. demo

Client expectations, specifications and portfolio details

Commercial and Legal terms to be agreed upon



Implementation

Configuration of Company specifics, e.g. users, access rights, portfolio structures, categories

Integration to e.g. account banks, where relevant

Upload of client total portfolio incl. historical data



Testing

Client gets access to Test environment

Reconciliation of data, including historical values

User tests to ensure end result before go-live

Client education and support as and when needed



Production

Go-live

Close client dialogue and interaction incl. support

Maintenance and continuous development in releases incl. client specific demands

Dedicated client service team