

Client Journey

Week 1:
Digitize questionnaires and associate flags/scores

Weeks 1-2:
Ensure data integrity by backloading data from firms, products, and contacts with tags

Weeks 2-3 (Optional):

- Perform test run with up to five (5) managers
- Conduct training for managers



Week 1:
Contract signed and project kicks off

Week 1:
Digitize internal DDQ profiles, create **ratings framework**

Week 2:
Provide **training to client team**

Weeks 2-3:
Go-live with enterprise-wide team(s) on platform

Dedicated Onboarding Manager Speaks Multiple Languages Fast Response Time Ongoing Global Support

* **Standard timeline for implementation is two (2) weeks**

* **Clients can opt to modify and extend go-live date with additional testing and training**