User journey overview

Identify needs

- What are you needs and Wwhat do you want to solve?
- What kind of family office? How many users? Which types of assets?
- Which integrations are needed?
- What are the reporting needs?

Onboarding (1-4 weeks in average)

- Setup of environment in Azure Datacenter
- Setup of clients, integrations, portfolios, strategy and accounting setup
- Import of data from excisting tool
- Training/Workshops

Interaction after implementation

- All support and upgrades are included
- One customer success manager
- Weekly webinars, yearly user seminars, newletters and release notes

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