



# ClearMacro User Journey: Within 2-6 months, leapfrog a generation in investment capabilities.

## Evaluation Journey (4-12 weeks)

## Success Journey (2-6 months)

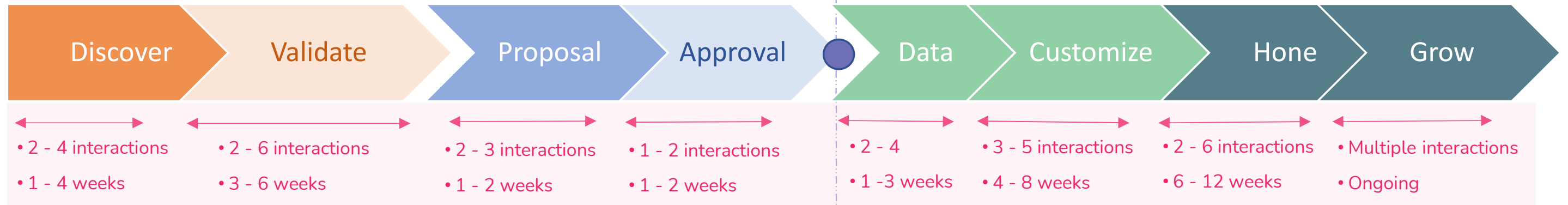
ClearMacro

- Identify pain points and unmet needs of specific MFO. Assess CM's relevance.
- Run customized product demo to demonstrate **Model Asset Allocation & Portfolio Rebalancing** solutions & impact.
- Provide trial platform access as relevant.

- Provide customized solution proposal.
- Negotiate with alt data vendors as relevant.
- Address technical concerns & outstanding questions.
- Formal pricing proposal and initial Scope Of Work to include SLAs based on definition of success).
- Legal contract and implementation planning.

- Set up *portfolio* objectives and constraints.
- Set up designated users: selected data.
- Set up customized views & reports and conduct feedback check-ins.
- Provide proactive support and training to key stakeholders.

- Respond to client feedback and needs with product development cycles.
- Ongoing in-person and online training.
- Leverage platform/comms with wider stakeholder base (e.g., white-label UI).
- Broaden value-add e.g., routes to market.
- Connect into wider MFO network.



Who?

- Investment team

- Procurement Lead

- Investment Team

- Adjacent stakeholders

Multi Family Office

- Complete Survey on problems & objectives.
- Demo/platform access as required and prep follow-up questions.
- Define target universe, parameters.

- Confirm presented solution meets needs.
- Confirm users & required support.
- Confirm pricing aligned with value.
- Identify final requirements (security, data etc.).
- Review and sign contract.
- Connect internal resource to implementation team.

- Provide ongoing feedback on use case and customized UI and reports.
- Refine "definitions of success" for Year 1.
- Identify upcoming opportunities for CM to add value ; calendar events (IC etc.).

- Provide feedback on impact and support.
- Identify additional problems and use cases as relevant.

No Consulting Fees. No Onboarding Charge.

Impact within 3 months. Total Cost of Ownership < 10%