

Customer Journey



Discovery

1. Discovery Call
2. NDA (optional)
3. Personalized Demo
4. Tailored proposal
5. Customer references
(optional)
6. Executed service contract
7. OnBoarding begins

OnBoarding

1. Kickoff calls
2. Dedicated slack channel
3. Historicals data import
4. Sandbox testing
5. Go-live

Service

1. Kickoff calls
2. First journal entries
3. Bank reconciliations
4. Consolidated reporting
5. Entity management
6. First month-end close
7. Executive report package
8. Financial clarity & control