User journey overview

Buying phase

Your journey starts with a discovery call to understand your family's needs and governance goals. We then provide a personalized demo and tailored proposal with clear use cases and pricing. Once aligned, we finalize the agreement and introduce your dedicated Client Success Manager to kick off onboarding.

Onboarding phase

Your dedicated Client Success Manager sets up your platform with custom design, governance spaces, and permissions. We provide admin training, ready-to-use templates, and support content uploads to ensure a smooth, hands-on launch. Onboarding adapts to your family's timeline and typically lasts 3 weeks to 3 months.

Service phase

Post-launch, we offer ongoing advisory, best practices, and engagement tips to maximize platform value. You'll also get invites to exclusive events and access to 24/7 global support.