



Customer Journey

Discovery

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

OnBoarding

1. Kickoff calls
2. Dedicated Dock MAP
3. Dedicated slack channel
4. Dedicated CSM
5. Historicals data import
6. Sandbox testing
7. Go-live

Service

1. Training
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