intelliflo redblack

Implementation & onboarding

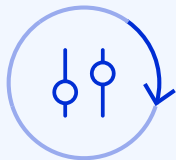## A proven approach to successful implementation and adoption

Our implementation process is designed to capitalize on opportunities to streamline workflows and increase efficiencies. intelliflo redblack's dedicated implementation team will work with you and your firm to strategically determine the best configuration to support you now and in the future.

We understand how critical it is to navigate each firm through our onboarding process; spending time with individual team members or teams ensures that each intelliflo redblack user feels confident in the solution and excited about their new workflows. Our commitment to your success doesn't stop there; we are with you every step of the way, from implementation through your continued evolution and onward through expansion.

Kickoff

Gain a warm welcome from our relationship managers and implementation team, where we'll kick off with a strategy session to gain a deep understanding of your long-term business goals so we can support the ideal launch experience for your firm.

Install & integrate

Our goal is to ensure a smooth installation and accelerate velocity through third-party APIs. We configure your solution to ensure data integration meets your straight-thru processing goals.

Train & trial

Our comprehensive training focuses on every type of user – from application set-up and admin training to everyday functionality essentials and creating workflows unique to your firm.

Test & adopt

We use a pilot workflow to thoroughly test the solution and strengthen your adoption framework while providing you with the opportunity to adjust workflows for maximum efficiency and ease of use.

Grow & scale

Our continuous solution enhancements future-proof your ability to evolve and scale, backed by our rich experience supporting firms who have grown from millions to billions in AUM.

A transparent and effective onboarding process

Our standard onboarding process takes approximately six to eight weeks and includes four main phases. These include:

Phase 1: Kickoff

- Introduction call with the intelliflo redblack team including, relationship managers, an integration engineer, and dedicated trainer
- Ask and answer questions about installation, integration, and training
- Credentials provided to intelliflo redblack users for access to our knowledge base

Phase 2: Installation & integration (1-4 weeks)

- Set up environment
- Confirm administrator access and setup user permissions
- Confirm ability to access cloud URL
- Create general navigation overview and user logins
- Import from source and map imported data
- Confirm successful data integration
- Configure FIX for trading directly to brokers, if applicable

Phase 3: Training (4-8 weeks)

- Training kickoff call
- Application overview
- Securities and classifications
- Models and model management
- Restrictions and equivalents
- Cash management
- Account and household overview
- Global rebalance and trading
- Rebalance settings
- Trade order management
- Advanced trading and fixed income (optional)
- Reporting
- Administrative settings
- Review sessions

Phase 4: GO LIVE!

- Start capitalizing on the efficiency, power, and sophistication of advanced rebalancing and trading
- Receive ongoing assistance from intelliflo redblack's support team, which is available Monday through Friday, 8:30 a.m. EST to 5:00 p.m. EST or refer to our online resources
- Tap into our relationship managers' experience from working with hundreds of firms like yours to advise you on best practices and proven workflows as your firm expands and changes

We look forward to working with you!

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