

# Client Journey

Any Data. Any System. Any Source.



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## HOW CLIENTS BUY PRETIM

### Awareness & Qualification

Prospective clients discover Pretim through industry events, referrals, or direct outreach. Pretim engages wealth managers, family offices, private banks, and fintechs across seeking a reliable data infrastructure partner.

### Discovery & Scoping

A structured conversation maps the client's data landscape: which custodians, investment funds, asset classes, and downstream systems are in scope. Client & Pretim identify the right service tier.

### Commercial Agreement

Stakeholders, timelines, and commercial terms are aligned. Usually a Proof of Concept is run for clients to validate Pretim's data quality.

### Procurement Decision

Clients select Pretim as their Wealth Data Infrastructure partner, with a clear deployment model: Delivery into the client's own infrastructure/data warehouse or any systems currently in use.

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## HOW CLIENTS ARE ONBOARDED

### Align & Contract

Scope, stakeholders, and timelines are locked in. KYC and compliance procedures are completed. Contract is aligned and signed.

### Connect & Collect

The data process model is defined: Pretim retrieves data directly via bank and fund consent (API, portal, or SFTP) or the client pushes files. Client & Pretim define data delivery (format).

### Model & Validate

Pretim designs the data model and API or file specifications if needed. End-to-end test cycles (PoC) run until aggregated outputs are accepted by the client. Data delivery is configured for the client's preferred destination.

### Go-Live & Run

Daily production runs begin. Pretim monitors data flows continuously, manages exceptions, and handles any breaks or anomalies. The client receives clean, standardized data into their PMS, reporting tools, and analytics stack.

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## ONGOING SERVICE INTERACTION

### Daily Data Delivery

Pretim delivers a single, normalized & reconciled data feed every day. Data flows via the client's preferred channel: API with JSON endpoints, SFTP with CSV, XML, or custom formats, push or pull, directly into the client's data warehouse or application layer.

### Monitoring & Exception Management

Pretim monitors every daily run end-to-end. When data breaks or anomalies are detected, structured exception management protocols are triggered.

### Dedicated Support & Escalation

A dedicated support team is accessible through formal channels. Named Pretim contacts are available for escalations and strategic collaboration. Clients interact with Pretim as a long-term operational partner, not a ticket queue.

### Continuous Enrichment & Evolution

As client needs grow, Pretim expands coverage: adding new custodians, asset classes, or enrichment layers such as market data and ESG. Pretim acts as the precursor to FIDA, positioning clients for future regulatory data requirements.