


Next Steps


Your journey with Eligible

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Getting to know you

We want this journey to be all about you and your business. So, first of all, we'd like to hear about your plans, what prompted you to look at our product and what challenges we can solve together.
- 2




The product tour

Our team of experts are on hand to show you our solutions, how they could work for your business and answer any questions, this is typically done via screenshare.
- 3




If the shoe fits...

We have the solution you're looking for, now is the time for us to put forward our commercial proposal. Don't just take our word for it, we're happy to put you in touch with a client or two.
- 4



Let's make it official

If we have the green light, it's now time to issue contracts and get things formally agreed. Even after you sign, you're in full control of what happens next and what happens with your data.
- 5



Handover

Welcome onboard! Now's the time to get our plans into motion. We'll consult you and your firm on next steps, and don't worry- we'll do the heavy lifting to get you launched.



Pre-launch

Phase 1 – Requirements

We'll cover all the information we need from you to get you set up, and everything we can do to help. This includes a run through of the specific data, branding and user role permissions.

Phase 2 – Data Hygiene Check

Once we've got the data from you, as promised we'll do the heavy lifting. Over the next two weeks, we'll run tests and checks on your data set to identify gaps, highlight potential improvements and share the results with you.

Phase 3 – Build & Test

We'll use your branding elements to make the consumer application look just like you - remember, we don't exist. Then we'll test absolutely everything to make sure it looks and feels right.



Launch

Once we're all happy with what we see, we'll load the confetti cannon and hit fire. This is the Eligible way of saying you're launched.



Post-launch support

- ✓ Free 24/7 online support - for any day-to-day questions you and your team have.
- ✓ Library of resources – a dedicated knowledge base full of support articles to help you get the best out of Retain.
- ✓ Ongoing check ins – to track your success and capture your feedback, because this powers our product!