

# What to Expect From the Ridgeline Implementation Process

Every firm comes to Ridgeline with its own history, priorities, and vision for the future. That's why we partner closely with you to understand your needs, map your workflows, and guide your firm through change with care, clarity, and hands-on support.



**The Ridgeline implementation has been a very high touch, very comfortable experience.**

— Patrick Wolcott, COO, Kennedy Capital Management



## **1 Phase 1: Understanding Your Needs and Goals**

We conduct a series of conversations focused on understanding your firm. We gain a clear view of your strategy, growth plans, and current tech stack, as well as which teams, asset classes, and entities are in scope. From these conversations, we align on the problems you're trying to solve and what your ideal future state looks like.

## **2 Phase 2: Diving Into Functionality and Workflows**

We explore how Ridgeline supports day-to-day operations with the people closest to the work. This starts by conducting discovery sessions with employees across the firm. From there, we map out current workflows, pain points, and manual steps. We provide role-specific demos and take the time to discuss functionality anchored in your individual use cases.

## **3 Phase 3: Scoping the Project Together**

We are now able to shape a concrete plan and formalize documents. This includes an initial implementation scope and priorities, a realistic high-level timeline and key milestones, and an overview of responsibilities on your side and ours.

## 4 Phase 4: Kicking Things Off

We hold a formal meeting to set expectations, ways of working, and present a drafted project plan that is solidified during the subsequent weeks of detailed workflow reviews.

This also serves as an introduction to your customer success manager and project leads. After getting final alignment on scope, successful criteria, and target go-live window, we identify your internal project team and start early data and vendor preparation.

## 5 Phase 5: Planning and Design

We begin translating your workflows into Ridgeline, holding detailed workflow and requirement sessions across functions. This firms up the understood operating models and configuration assumptions before the team executes a live view in the Ridgeline platform.

Additionally, decisions on the data migration approach – data mappings, source files, delivery cadence – and integration scope are formalized. As this phase draws to a close, the detailed implementation plan is ratified and workstream collaboration cadence is set.

## 6 Phase 6: Configuring, Migrating, and Testing

We build and have your subject matter experts spend time in the system to ensure everything works as intended. We meticulously:

- Configure applications, rules, and workflows in Ridgeline
- Migrate and validate a representative sample of data, typically one full quarter, from your legacy systems
- Iterate on feedback post initial review and incorporate that into the platform. This provides a real-time view of what the future will look like in Ridgeline compared to diagrams or descriptions of how it may look once complete.
- Build and test integrations with custodians, market data, CRM, and other tools
- Run end-to-end and user acceptance testing with your teams

## 7 Phase 7: Going Live on Ridgeline

At this point, you move into production and receive ongoing support, training, and roadmap guidance from our Customer Experience team. We do final data loads, reconciliations, and cutover from your legacy systems. You have elevated support from Ridgeline during this focused hypercare period.

### Have questions about implementing a front-to-back platform?

Check out our white paper “[Why Firms Avoid Change \(And Why You Shouldn’t\)](#)” where we explore implementation fears and how Ridgeline sets firms up for success.

GET IN TOUCH

[hello@ridgeline.ai](mailto:hello@ridgeline.ai)