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**30-DAY LAUNCH PLANNING**

# Plan a launch on established infrastructure.

Use your brand and approved product model on existing infrastructure, then configure the investor journey and prepare for launch. This guide covers an agreed standard web configuration. Migration, native-app releases, bespoke work and new integrations are scoped separately.

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**FIT CHECK**

## New offering or existing fund?

For a new offering, we work through the product and what is needed for launch. For an existing fund, the first step is to assess its current arrangements before agreeing how it will use the platform.

### New offering fit

Bring the brand, investment strategy, intended investors, proposed economics and product inputs. The relevant parties can then establish the product model and release path.

### Existing-fund fit

An existing fund retains its brand, strategy, assets and relationships. Before scope is agreed, assess the governing rights, permissions, registry and investor data, providers and integrations.

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**INDICATIVE FOUR-WEEK SEQUENCE**

## Four weeks to prepare an agreed standard web configuration.

### Week 1 Review the assessment and launch plan

Confirm whether you are launching a new offering or bringing across an existing fund that has completed its initial assessment. Review the findings and the information agreed for launch: your brand, strategy, intended investors, proposed financial terms and product-framework plan. For an existing fund, use the earlier assessment of governing rights, permissions, registry and investor data, providers and integrations to work through the details.

### Week 2 Configure the approved journey

Approve how investors and administrators will use the website. Apply your brand, the agreed product settings, user roles and disclosures, then set up joining, identity checks and eligibility checks.

### Week 3 Set up the agreed operations

Agree who is responsible for the connected services. Connect and test the joining and administration processes, the provider's account and payment services, and the approved records and reporting included in the project.

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## Week 4 Confirm readiness for release

Check the website against the agreed acceptance criteria and approve its release. Complete acceptance testing, prepare your staff, obtain production approval and finish the agreed launch-readiness checks.

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### READINESS BRIEF

## What we need to plan your launch

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### Commercial and product inputs

Brand assets and direction, the asset or investment strategy, target client segment, client relationship, proposed economics, investor eligibility, minimums, fees, distributions, transfer or exit approach, communications and supporting product information.

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### Approvals and decision owners

The relevant issuer, licensee and governance participants set and approve the product rules, disclosures and regulated-activity arrangements allocated to them. Identify internal reviewers for product input, scope decisions, acceptance testing, launch readiness and sign-off.

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### PLANNING TARGET

## What sits behind the 30-day target.

An agreed standard web implementation can be planned for launch in as little as 30 days when required inputs, agreed scope and branding, product documentation, product-specific approvals, timely decisions and sign-off, readiness, acceptance testing and integration readiness are in place. It is a planning target, not a guarantee. Native-app releases, bespoke work, migration, new integrations and external dependencies are agreed separately and may take longer.

### **The platform operator does not hold investor cash in the provider-led model.**

Actual providers, account terms, payment flows and responsibilities are confirmed for the agreed deployment. Product instruments establish investor rights, and digital records support registry and administration.

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## Work out what your launch needs.

Talk through the offering, approval pathway, readiness work and scope required to plan your launch.

### [Discuss your launch scope](#)

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