

Setting up your firm with Ascentric

Thank you for considering Ascentric for your firm. Before we set you up on the platform, we need to understand your requirements - this helps us make sure everything runs as smoothly as possible.

What do you need to do?

We need to arrange a telephone call where we'll ask a few questions to help us make sure you get the best out of the platform. The conversation will be no longer than an hour and questions will range from functionality requirements; to training requirements; to your firm's security requirements.

Meeting your Ascentric contact

Once we've had the initial telephone call, we will arrange for a Business Development Manager or Platform Consultant to visit you. This will be your on-going contact at Ascentric and they will be able to organise platform training for you and your team.

Getting set up on the platform

When you have met with your Ascentric representative and your platform training has been booked, we will begin to set you up on the platform. Further details will be supplied at this time.

How to book in

To book an appointment please contact the **Business Development Team** on **01225 787 575** or by email **BDC@ascentric.co.uk**