PA Stage 1 - PA Customer Kickoff Meeting

Summary

Setting the scene and clarifying the expectations with key customer stakeholders.
The focus is entirely on the Wealth Management onboarding journey.
The most important part here is to present a contextualised credible plan moving forward.
Customer stakeholders will want to know **HOW** to get there.

What do we want the customer to believe after the meeting:

"MuleSoft PA understands our goals and objectives"
"MuleSoft PA has done it successfully for other organisations""
"It is in my interest to ensure all relevant stakeholders are available for the coming workshops"

Possible draft agenda:

- Introduction
- Our Understanding
- Current BF State Assessment
- Recommended Approach
- Initial Phase Objectives and Success Criteria
- **Initial Phase Engagement Plan** - BF Wealth Management customer onboarding
- Risks and Mitigation
- What we need from your team

Please make sure that you cover the contents in maximum 12 slides.
It is a **conversation**, **not only** a presentation. Be prepared to answer questions about the "how".

Refer to API Strategy Blueprint for vocabulary.