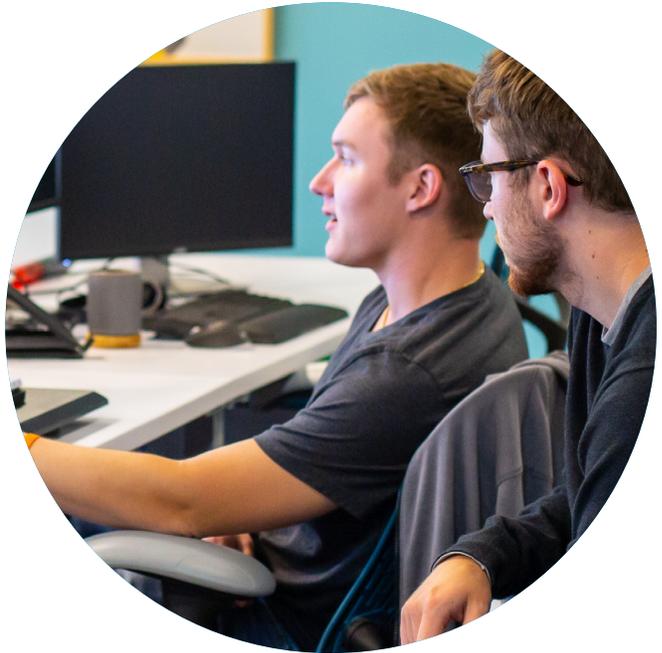# monarch

DealCloud Fuels Rapid Growth with Implementation Support

CHALLENGES

DealCloud is a CRM platform that enables private equity, venture capital, investment banks, and other capital management firms to manage relationships, execute deals, and easily connect with external solutions and third-party data providers from a single source of truth.

As DealCloud experienced rapid growth, sales outpaced internal capacity for new client onboarding, introducing risk to successful client relationships. The "last mile" of client implementation was identified as a key driver to client success. During this phase, the client has a chance to take the newly configured system for a test-drive and may realize additional needs that were not identified upfront.

DealCloud needed an extension of their team to alleviate core implementation staff working on large enterprise deals without risking their existing new client relationships. They wanted a dedicated partner with low turnover and access to a skilled talent pool.

DealCloud was facing growth pains and needed unique solutions.

- Sales were outpacing internal capacity for successful new customer implementation.

- DealCloud processes required specialized technical skills and customer service capabilities.

- DealCloud's internal team needed to alleviate bandwidth so they could focus on enterprise deals.

SOLUTIONS

Hereshore® Implementation Specialists

Monarch, a division of Core10, integrated talented Hereshore® implementation specialists from local communities to curb startup times through easy communication, time-zone alignment and specialized Fintech experience.

Ecosystem Onboarding

The Monarch team trained extensively with DealCloud to thoroughly understand their market, system, and processes. They were able onboard large and small clients within the DealCloud eco-system and work with their DealCloud colleagues to ensure quality in all client interactions.

White-Label Capabilities

Monarch's flexibility includes white-labeling for a personalized client experience. The Monarch team analyzes client data, tailoring the application for specific use cases through continuous consultation.

Customized Configurations

Monarch team members ask questions to ensure understanding and effectiveness when refinements are requested rather than just completing the request. Developing a strong understanding of "why" enables the best product configuration for the clients.

The Monarch Solutions for DealCloud Included:

Trained and highly skilled staff focused on SaaS implementation services

Scalable workforce to support evolving needs within DealCloud business model

White-label implementation specialists for onboarding and fostering new customer relationships

DealCloud has seen an increase in the number of clients onboarded effectively and an impact on client success and account management, including renewals and additional projects.

When clients are properly onboarded, they use the application more effectively, implement it into their daily habits and are more likely to continue as clients for years to come.

Core staff now has the ability to focus on their highest value clients while tapping Monarch's resources when they hit a ceiling on internal capabilities. This model keeps DealCloud nimble by providing highly skilled Monarch team members only when they need them. Moreover, Monarch's autonomous team works effectively with minimal time investment or oversight from DealCloud.

Through Monarch, DealCloud was able to:

- Source implementation talent on demand
- Alleviate bandwidth and overall budget
- Support existing staff when they need it most

> " Monarch has allowed us to **implement and onboard new customers quickly** and with a level of professionalism that ensures success. Truly understanding our clients and working with their specific needs means they are more likely to continue working with us and to integrate DealCloud into their business in new ways in the future."

ERIN GUINAN
SVP, SERVICES AT DEALCLOUD

DealCloud
An Intapp Company

Meet your goals by using **flexible and scalable platform expertise** from Monarch.

monarchpsg.io

monarch