

# Structuring and Implementing a *Successful CRM Strategy for an Asset Manager with Monarch*



## CHALLENGES

A reputable asset manager focused on lower-middle market businesses, across both debt and equity, had long relied on a well-built CRM to support the firm’s growing deal volume. Their team had developed a strong internal process for tracking deals and sharing insights, one that had served them well through years of growth.

As the firm continued to expand, however, they identified team segments whose evolving needs aligned better with the capabilities of Intapp DealCloud. While the firm’s broader CRM infrastructure had supported operational success, the firm moved to DealCloud to support specific divisions that required deeper visibility, automation, and analytics in support of their strategic goals.

**“We had a clear vision for the insights we wanted to surface, but I didn’t always have the time or technical resources to bring that vision to life within the platform. That’s where Monarch helped us take the next step,” a team member shared.**

To fully leverage DealCloud’s potential, the firm sought a partner that could complement their internal expertise and accelerate platform adoption *without disrupting their momentum.*

## Key Areas of Focus

- Refining data presentation to enable deeper insight into sourcing activity and relationship strength
- Developing tailored dashboards to match team workflows and priorities
- Establishing streamlined reporting structures that could keep pace with the firm’s growth

## SOLUTIONS

The firm engaged Monarch to build upon their strong existing systems and maximize their DealCloud investment through a thoughtful, customized configuration.

Monarch worked hand-in-hand with the team to provide targeted enhancements that aligned with the firm’s business goals by refining data views, streamlining reporting, and ensuring DealCloud served as a central hub for insight-driven decision-making.

### Monarch’s support included:

- **Redesigning detail pages to highlight key metrics** such as source breakdowns, campaign-level pipeline views, and relationship scoring
- **Transitioning select reporting workflows to dynamic dashboards** from spreadsheets
- **Creating personalized dashboards** by user, with automated task emails and cues for outreach to key contacts
- **Implementing a new interaction scoring system** to help prioritize the firm’s most valuable relationships and deals

## RESULTS



### Sharper Pipeline and Relationship Insights

With these enhancements, the firm has better visibility into their deal pipeline and relationship health, allowing them to prioritize high-value opportunities with greater precision.



### Simplified, Actionable Reporting

Real-time dashboards replaced spreadsheet-based reports, delivering actionable insights at a glance.



### Clarity on Team Capacity to Support Growth

The firm has greater access to each member's capacity, positioning them well for their next stage of growth.

By building on their forward-thinking approach in collaboration with Monarch, the firm has extended the capabilities of their CRM strategy, elevating their successful operations and strengthening their foundation for long-term scalability and success.

“

I highly recommend partnering with Monarch. They are efficient, truly understand the product (DealCloud), and can provide reporting and analytics you may not have known were possible in this platform. I am very happy with the outcome.”

**Partner, Private Debt**

MONARCH DELIVERS:

**A proven track record—  
3,900+ projects, 1,400+ clients**

We've supported more than 1,400 firms through periods of growth, complexity, and change by helping them implement and expand their use of DealCloud.

We enable clients to reduce friction, gain clearer insights, and accelerate time to value.

Ready to expand what's possible in DealCloud?  
**Build on your success with a DealCloud setup that works as hard as your team does. Let's talk.**

