

Hello DealCloud Account Managers!

We're pleased to provide you with an email template you can use **when you introduce us to clients as an implementation/consulting partner.**

Good reasons to do that include:



Client has **budget or timing requirements** that Monarch address



Your internal services team has its hands full and we have capacity to move quickly



Client wants a **service that Intapp no longer handles internally** (e.g. Duplicate Contact Cleansing)



Client **prefers a third-party services** provider for other reasons

Our relationship with DealCloud evolves and deepens – you may have heard internally that Intapp is now supplementing our subcontracting relationship by referring us directly into client engagements.

We want to do whatever we can to make the engagement and handoff process smooth and simple for YOU, the account manager.

Feel free to customize this template to fit your style and the client scenario.

And please reach out directly to the Monarch team if we can help along the way.

Best,
Lee & Anthony

[Click here to download the email template](#) that is provided below. Once downloaded and opened, the template will populate in a new email draft.

TEMPLATE:

Subject: Intapp DealCloud Implementation and Consultation Partner

Hi [Insert Client Name],

I'm writing to introduce you to Anthony Alexander at Monarch, a DealCloud implementation and consulting partner of ours.

Monarch has worked with DealCloud clients for 6+ years, execution over 1800 projects for over 375 firms like yours – so they bring tremendous experience and skill to these engagements.

I think you'll find that they also offer a unique combination of value – the ability to work quickly and cost effectively, combined with deep expertise in the specific needs of financial services firms.

Or, put simply – they know your technical systems and speak your business language.

I'll let you and Anthony find time to connect live to discuss your specific project and needs. Of course, I'll remain a point of contact, able to assist however I can moving forward.

In the meantime, I encourage you to learn more about monarch at their website (<https://monarchpsg.io>) where you can also download an overview of the 80+ financial services use cases, workflows, data integrations, and customizations they can execute.

Best Regards,

[Insert Your Name]