Monarch's
Intapp DealCloud
Sprint Packages

monarch

DEALCLOUD SPRINT
PACKAGE OPTIONS

NEW IMPLEMENTATION

DealCloud Sprint Accelerated Implementation

This service provides a 7-step standard setup designed to deliver DealCloud implementation over 3 weeks to a maximum of 6 weeks.

DealCloud Sprint No Data Accelerated Implementation

This package entails a 6-step standard setup to deliver DealCloud implementation over 3 weeks to a maximum of 6 weeks. Data import services are not included as part of this offering.

POST GO-LIVE

5-Hour Platform Training

Monarch delivers five one-hour technical training sessions focused on platform configuration and customization. These sessions cover Guided Click-Through Tutorials, Field Addition Tutorial, Configuration & Impact Training, Word Report Adaptation, and Optional Client-Led Sessions.

5-Hour Tailoring Package

This package offers three object review sessions, each lasting 45 minutes. The sessions include Session 1: Company Object Review, Session 2: Contact Object Review, and Session 3: Opportunity Object Review. This package provisions follow-up configuration support as outlined in the scope of work.

10-Hour Tailoring Package

Monarch provides three object review sessions, each lasting 45 minutes. The sessions include Session 1: Company Object Review, Session 2: Contact Object Review, and Session 3: Opportunity Object Review. Additionally, Monarch will offer two 45-minute working sessions including Session 1: Dashboard Customization & Adjustments and Session 2: Power User Feature Updates. This package provisions follow-up configuration support as outlined in the scope of work.

Templated Data Migration

Monarch completes a one-time migration of the data sources outlined in the scope of work from Excel. Monarch sets up the initial templates based on the provisioned blueprint.

Templated Data Migration w/New Fields

This service provides a one-time migration of the data sources outlined in the scope of work from Excel. Monarch sets up the initial templates based on the provisioned blueprint as well as supports one cycle of updates on the templates provided, including up to five net new fields in total and up to five nomenclature updates per object level.

Rapid Normalization Data Migration

Monarch completes a one-time migration of companies, contacts, and opportunities from Excel, utilizing pre-created templates that conform to the site's provisioned blueprint/starting point. Monarch normalizes and parses data from one file. A maximum of 300 rows per origin table (companies, contacts, opportunities) is included in the migration.

ENABLEMENT

Data Cortex

As part of this service, Monarch enables the DataCortex of your selected data provider in your DealCloud instance. Monarch also provides training on the standard DataCortex functionality & workflows.

Intapp Assist - Core

Monarch enables the Intapp Assist offering in your DealCloud instance. This enablement includes: Detail Page Summaries, Narrative Generation, Contextual Email Outreach, Smart Tags, Prompt Studio, and Recommendations. A 45-minute training session to discuss core functionality is also provided.

Dispatch Level 1

For this service, Monarch enables the Dispatch Email Mailing Marketing offering in your DealCloud instance. A review cycle of refinements for the marketing dashboards and detail pages and training on the standard Dispatch Mailing functionality & creation of 'Marketing Email' templates are also supported.

Dispatch Level 2

This service includes the Dispatch Level 1 package plus enabling the Dispatch "Pages" marketing feature in your DealCloud instance. A review cycle of refinements for the 'Form Submissions' detail pages and training to roll out this feature are also supported.

Dispatch Level 3

This service includes the Dispatch Level 1 and Dispatch Level 2 packages plus enabling the Dispatch "Sequences" feature within the Customer's instance of the DealCloud technology. Monarch also provides a 30-minute training session for the client team on the Dispatch "Sequences" functionality.

Relationship Signals

Monarch enables the Intapp Assist offering in your DealCloud instance. Additionally, Monarch also offers a 30-minute training session to discuss the core functionality of Relationship Signals.

SharePoint Integration

Monarch enables the Cloud Storage widget for the Customer and works with your IT team to connect to your SharePoint instance.

New Implementation

DEALCLOUD SPRINT
ACCELERATED IMPLEMENTATION

FIXED FEE: $4,000

A Monarch Implementation Consultant will conduct the following 7 steps as part of the accelerated delivery of DealCloud.

1. **Kick-off Session**
   This session introduces the timeline and empowers a designated power user to independently make adjustments.

2. **Configuration Assistance**
   Monarch will provide assistance in the configuration of the connectivity between your organization's Outlook Exchange Server and the DealCloud Web Application.

3. **Training Sessions**
   Upon request, Monarch will provide up to two sessions for business users focused on industry blueprint-specific workflow demonstrations or data template consultations.

4. **Data Import**
   Monarch will execute a one-time data import utilizing the templates furnished at the time of contract execution.

5. **Roll Out Training**
   Monarch will deliver one roll-out training session for business users on the core functionality of the DealCloud blueprint via the web application.

6. **DealCloud University Introduction**
   Monarch will provide an introduction to DealCloud University – Platform Manager Certification, an online certification course.

7. **Account Manager Introduction**
   Monarch will provide an introduction to a dedicated Account Manager, who will be your point of contact to discuss any further required adaptation to Intapp's best practices once delivered on the platform.

The included enablement services will be conducted over a 3-week period, to a maximum of 6 weeks in case of any requested timeline extensions.

New Implementation

DEALCLOUD SPRINT NO DATA
ACCELERATED IMPLEMENTATION

FIXED FEE: $2,000

A Monarch Implementation Consultant will conduct the following 6 steps as part of the accelerated delivery of DealCloud.

1. Kick-off Session
This session introduces the timeline and empowers a designated power user to independently make adjustments.

2. Configuration Assistance
Monarch will provide assistance in the configuration of the connectivity between your organization's Outlook Exchange Server and the DealCloud Web Application.

3. Two Training Sessions
Upon request, Monarch will provide up to two sessions for business users focused on industry blueprint-specific workflow demonstrations or data template consultations.

4. Roll Out
Monarch will deliver one roll-out training session for business users on the core functionality of the DealCloud blueprint via the web application.

5. DealCloud University Introduction
Monarch will provide an introduction to DealCloud University – Platform Manager Certification, an online certification course.

6. Account Manager Introduction
Monarch will provide an introduction to a dedicated Account Manager, who will be your point of contact to discuss any further required adaptation to Intapp's best practices once delivered on the platform.

The included enablement services will be conducted over a 3-week period, to a maximum of 6 weeks in case of any requested timeline extensions.

Post-Go Live

5-HOUR
CONFIGURATION TRAINING

T&M: $1,500

Monarch will be responsible for delivering five (5) one-hour technical training sessions focused on platform configuration and customization. These sessions will be structured as follows:

- Guided Click-Through Tutorials – Sessions will primarily utilize interactive, step-by-step screen tutorials to demonstrate key configurations.
- Field Addition Tutorial – Training on the process of adding net new fields and implementing them within the system.
- Configuration & Impact Training – Guidance on adapting dropdown selections and understanding downstream impacts.
- Word Report Adaptation – Instruction on modifying specific Word-based reports to align with client requirements.
- Optional Client-Led Sessions – Opportunities for client-driven problem-solving discussions and configuration suggestions.

5-HOUR
TAILORING

FIXED FEE: $2,250

Monarch will conduct three object review sessions, each lasting 45 minutes.

- Session 1: Company Object Review
  - Walkthrough of the entry form, including terminology, flow, and positioning
  - Addition of up to five basic (non-reference) fields
  - Review of the detail page layout
  - Overview of company relationship (dashboard) reporting
- Session 2: Contact Object Review
  - Walkthrough of the entry form, including terminology, flow, and positioning
  - Addition of up to five basic (non-reference) fields
  - Review of the detail page layout
  - Overview of company relationship (dashboard) reporting
- Session 3: Opportunity Object Review
  - Walkthrough of the entry form, including terminology, flow, and positioning
  - Addition of up to five basic (non-reference) fields
  - Review of the detail page layout
  - Overview of company relationship (dashboard) reporting

Follow-up configuration is limited to the scope outlined above.

Post-Go Live

10-HOUR
TAILORING

FIXED FEE: $4,000

Monarch will conduct the following sessions.

Object Review Sessions (3x 45-minute sessions)
- **Session 1:** Company Object Review
  - Walkthrough of the entry form, including terminology, flow, and positioning
  - Addition of up to five basic (non-reference) fields
  - Review of the detail page layout
  - Overview of company relationship (dashboard) reporting

- **Session 2:** Contact Object Review
  - Walkthrough of the entry form, including terminology, flow, and positioning
  - Addition of up to five basic (non-reference) fields
  - Review of the detail page layout
  - Overview of contact relationship (dashboard) reporting

- **Session 3:** Opportunity Object Review
  - Walkthrough of the entry form, including terminology, flow, and positioning
  - Addition of up to five basic (non-reference) fields
  - Review of the detail page layout
  - Overview of opportunity relationship (dashboard) reporting

Working Sessions (2x 45-minute sessions)
- **Session 1:** Dashboard Customization & Adjustments
  - Feedback and refinement of two dashboards based on client input

- **Session 2:** Power User Feature Updates
  - Application and review of updates to power user-related features:
    - Reference dropdown value adjustments
    - Two Notifications setup
    - One Word report branding updates and addition of new fields from object review sessions

Follow-up configuration is limited to the scope outlined above

Post-Go Live

TEMPLATED
DATA MIGRATION

FIXED FEE: $3,500

Monarch will complete a one-time migration of the data sources from Excel. The migration process will utilize pre-created templates that conform to the site's provisioned blueprint/starting point.

- Monarch will provide "Data Import Templates" to your team, these will be inclusive of companies, contacts, deals, funds, fundraise processes, and interactions.
- After your team fills in the templates to conform to the template schema and standards, Monarch will perform one round of review to identify any data normalization that should be completed by your team before upload.
- Once normalized, Monarch will complete a one-time migration for each list into the DealCloud platform.
- Any additional data points that do not conform to the schema but are still relevant will be added as legacy fields for the Customer to later incorporate into reporting as needed.

Monarch will set up the initial templates based on the provisioned blueprint.

TEMPLATED DATA
MIGRATION W/NEW FIELDS

FIXED FEE: $4,000

Monarch will complete a one-time migration of the data sources from Excel. The migration process will utilize pre-created templates that conform to the site's provisioned blueprint/starting point.

- Monarch will provide "Data Import Templates" to your team, these will be inclusive of companies, contacts, deals, funds, fundraise processes, and interactions.
- After your team fills in the templates to conform to the template schema and standards, Monarch will perform one round of review to identify any data normalization that should be completed by your team before upload.
- Once normalized, Monarch will complete a one-time migration for each list into the DealCloud platform.
- Any additional data points that do not conform to the schema but are still relevant will be added as legacy fields for the Customer to later incorporate into reporting as needed.

Monarch will set up the initial templates based on the provisioned blueprint as well as support one cycle of updates on the templates provided, including up to five net new fields in total and up to five nomenclature updates per object level.

Post-Go Live

RAPID NORMALIZATION
MIGRATION

FIXED FEE: $4,000

Monarch will complete a one-time migration of the data sources below from Excel. The migration process will utilize pre-created templates that conform to the site's provisioned blueprint/starting point.

Monarch will then perform a data import for the following tables in DealCloud:
- Companies
- Contacts
- Opportunities

- Monarch will normalize and parse data from one file (any number of sheets) across the three destination objects.

- A maximum of 300 rows per origin table (companies, contacts, opportunities) will be included in the migration.

- Monarch will perform one round of review to identify any data normalization that should be completed by your team before upload.

- Once normalized, Monarch will complete a one-time migration for each list into the DealCloud platform.

- Up to three unique basic metrics per destination table may be added (excludes reference fields, which will be included at Monarch's discretion).

- This service also includes a 30-minute review session of the finalized three destination tables prior to import.

Enablement

DATA
CORTEX

FIXED FEE: $2,500

As part of this service, Monarch will enable the DataCortex of your selected data provider in your DealCloud instance.

This activity will require the following tasks:
- Monarch will review the current data provider integration fields on each object level.
  - This includes:
    - Implementation of a predefined set of best practice fields with a standard rollout.
    - Inclusion of up to five standardized reporting fields per object level.
- Monarch will then create the fields that you would like to integrate from the data provider.
- We will link fields from the data provider and display them on the applicable detail pages.
- Monarch will also link 100% matches for company and contact entries to the data provider using DealCloud's matching algorithm.
- Additionally, Monarch will provide training on the standard DataCortex functionality & workflows.

INTAPP ASSIST
CORE

FIXED FEE: $2,500

As part of the services, Monarch will enable the Intapp Assist offering in your DealCloud instance. This enablement includes:

- Detail Page Summaries
- Narrative Generation
- Contextual Email Outreach
- Smart Tags
- Prompt Studio
- Recommendations

- This activity will require the following tasks:
- Monarch will configure the above functionality according to standardized Industry Enablement Guides and Applied Outreach Enablement Guides.
- We will also provide a 45-minute training session with your team to discuss core functionality and how to use the above functionality.

Enablement

DISPATCH LEVEL 1
DISPATCH MAILINGS ENABLEMENT & TRAINING

FIXED FEE: $2,500

- Monarch will enable the Dispatch Email Mailing Marketing offering in your DealCloud instance.
- This activity will require the following tasks:
  - Review current marketing practices with your team, specifically branding guidelines.
  - Monarch will coordinate with DealCloud's GA team to obtain the necessary CNAME records and whitelisting information and will provide this to your team.
  - We will configure an 'Email Campaigns' (e.g., Deal Announcements, General Announcements) dashboard.
  - Monarch will also configure a 'Marketing Activity' tab on the company, contact, and campaign detail pages (as applicable).
  - You may request one review cycle of refinements for the marketing dashboards and detail pages, if needed.
  - Monarch will also provide one training on the standard Dispatch Mailing functionality & creation of 'Marketing Email' templates.

Monarch will not be responsible for creating any "Marketing Emails" for client mailings.
Dispatch "Pages" functionality and Dispatch "Sequences" functionality are excluded.

DISPATCH LEVEL 2
DISPATCH MAILINGS & PAGES ENABLEMENT & TRAINING

FIXED FEE: $3,500

This service includes the Dispatch Level 1 package plus enabling the Dispatch "Pages" marketing feature in your DealCloud instance.

This activity will require the following tasks:
- Monarch will configure a 'Form Submissions' tab on the contact, email, and event detail pages (as applicable).
- Your team may request one review cycle of refinements for the 'Form Submissions' detail pages, if needed.
- Monarch will offer up to one 1-hour training session to roll out this feature to your team's end users.

Monarch will not be responsible for creating any "Landing Pages" for client team events or surveys.
Dispatch "Sequences" functionality is excluded.

Enablement

DISPATCH LEVEL 3
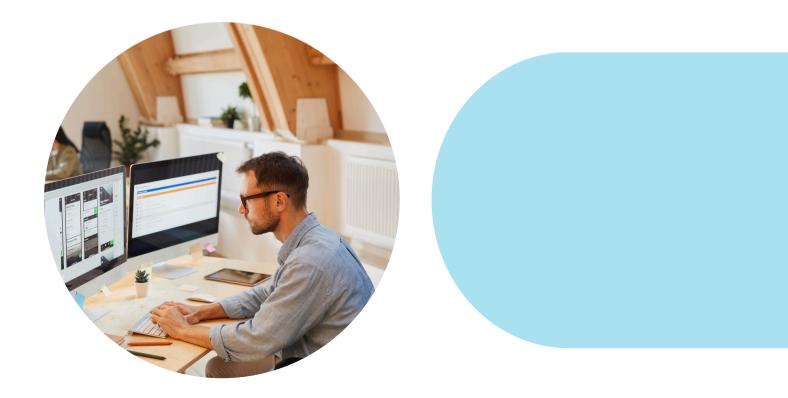## DISPATCH MAILINGS, PAGES, & SEQUENCES ENABLEMENT AND TRAINING

FIXED FEE: $4,000

This service includes the Dispatch Level 1 and Dispatch Level 2 packages plus enabling the Dispatch "Sequences" feature within the Customer's instance of the DealCloud technology.

This activity will require the following tasks:

- Monarch will provide up to one 30-minute training session for the client team on the Dispatch "Sequences" functionality.

Monarch will not be responsible for any additional effort other than enabling the Dispatch "Sequences" functionality and training the client team to leverage the DealCloud "Sequences" functionality.

Enablement

INTAPP ASSIST
RELATIONSHIP SIGNALS

FIXED FEE: $3,500

Monarch will enable the Intapp Assist offering in your DealCloud instance.

This enablement includes:
- Relationship Signals

This activity will require the following tasks:
- Monarch will configure the above functionality according to the standardized Relationship Signals Enablement Guide.
- One 30-minute training session with your team to discuss core functionality and how to use the above functionality.

To participate in this service, Relationship Scoring must be enabled and active in their DealCloud platform.

SHAREPOINT
INTEGRATION

FIXED FEE: $2,000

Monarch will enable the Cloud Storage widget and work with your IT team to connect to your SharePoint instance.

If any additional requirements are requested, a separate scoping and change order will be required.

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A DealCloud Partner You Can Trust.

As Intapp DealCloud's most experienced partner, we help businesses maximize their platform investment. From onboarding and data migration to configuration and ongoing support, our expertise ensures seamless alignment with your business operations.

Whether you're facing challenges with adoption, data management, or leveraging AI functionalities, Monarch provides tailored, cost-effective solutions that drive efficiency and productivity, ensuring you achieve your goals promptly and effectively.

GET TO KNOW MONARCH

We've worked with Intapp DealCloud for six years, and our delivery team members average two years of tenure.

Our expertise in Private Capital Markets and Professional Services has established us as the leading DealCloud service provider.

OUR SERVICES INCLUDE

INTAPP
DealCloud

- Data migration
- General consulting/configuration
- Site rebuilds/revamps
- Migrating to new blueprints
- DataCortex integrations
- Feature enablement (RMS, AI, Intapp Data)
- Ongoing support/retainer
- Industry-specific module builds

1,800 Total Intapp DealCloud Projects

350 Implementations

300 DataCortex Integrations

100 Managed Services Projects

Our experience runs deep in multiple industries.

Private Equity	Real Estate
Corporate	Hedge Funds
Fund of Funds	Private Credit
REIT	Family Offices
Investment Banks	Placement Agents
Venture Capital	Law Firms

Update DealCloud Based On Business Processes Faster
Eliminate long lead times for services projects and implementation.

Cost-Effective Results
Find a per-project or per-hour solution that fits budgets and timelines.

Access Reliable Talent
No delays in response or availability with a U.S.-based team.

Start working with DealCloud's most experienced partner today.

1 Schedule a Chat
Talk with us about your upcoming DealCloud initiatives, and we'll provide a tailored plan for addressing needs.

2 Let Us Do the Heavy Lifting
Our team will configure your software and train your team to get the most from the platform.

3 Start Maximizing ROI
Intapp DealCloud is now optimized for your business operations so you can start reaping the full benefits of the platform.

> "Thanks to your extraordinary efforts, we now have a CRM system that we can be proud of. Your collaborative spirit and focus on delivering quality results have truly made a significant impact."

SENIOR MARKETING & CLIENT DEVELOPMENT MANAGER LABOR AND EMPLOYMENT LAW FIRM, 200+ ATTORNEYS

Let us deliver your **Intapp DealCloud** solutions quickly and seamlessly.

Reach out today at **monarchpsg.io/contact**

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