

Empower Your Success with Tailored DealCloud Solutions

DealCloud Use Cases, Workflows & Customizations

Intapp DealCloud is more than just a CRM. It integrates comprehensive deal and relationship management capabilities with advanced data analytics, reporting, pipeline management, and workflow automation – all built specifically for financial services firms.

At Monarch, we implement, integrate, enhance, and manage DealCloud to address the specific needs of our clients, delivering a tailored experience, quickly, and cost-effectively. For most organizations, that starts with a solid foundation for pipeline and engagement management, and baseline investor relations processes. And then, the sky's the limit.



80+ INDUSTRY-SPECIFIC DEALCLOUD SOLUTIONS & SCENARIOS

Investment Banks	Private Equity	Venture Capital	Investor Relations
<ul style="list-style-type: none"> • Fees • Pipeline Statistics • Counterparty Lists • Building Precedents Database / Market Transactions • Buyer Bids • NDA Tracking • Strategic Buyer Screening • Financial Buyer Screening • Buyside Deals • Sellside Deals • Buyside & Sellside Deals • Competitor Analysis • Attributions 	<ul style="list-style-type: none"> • Intermediary Tracking/ Scoring • Investment Committee Meetings, Agendas & Voting • Exits • Deals in Market • Funds in Market • LP Commitments and Investment Vehicles • Deal Execution • Deal Origination • Deal Sourcing • Co-Invest Offerings • Fundraising • Portfolio Company Financials and Metrics 	<ul style="list-style-type: none"> • Due Diligence Fees • Portfolio Monitoring • Portfolio Talent Management • Portfolio Projects • Co-Invest Offerings • Deal Origination and Tracking • Fundraising • Investment Thesis • Sourcing and Intermediaries 	<ul style="list-style-type: none"> • Fund Vehicles / Feeder Funds / Fund Entities • Transfers of Interest • Fund Closings • Travel Hubs/Roadshows • Co-Investments • LP Correspondences • Multiple / Complex Consultant Advisor Relationships • Discretionary Consultants • HNWIs • Previous Commitments to Inform Future Fundraising

Corporate Development	Family Office	Fund of Funds	Legal
<ul style="list-style-type: none"> • Deal Tracking and Pipeline Management • Third party Fees • Relationship Management 	<ul style="list-style-type: none"> • Deal Management • Primary, Secondary, and Fund Investments • Co-Invest Offerings 	<ul style="list-style-type: none"> • Primary, Secondary, and Fund Investments • Fundraising • Portfolio Management • Transfers of Interest 	<ul style="list-style-type: none"> • Matter Management • Opportunity Management • Relationship Management • Referral Tracking

Limited Partners	Placement Agent	Fund of Funds	Real Estate
<ul style="list-style-type: none"> • Fund Performance • Direct and Co-Investments • Deal Execution and Evaluation • Sourcing • Staffing • Portfolio Management 	<ul style="list-style-type: none"> • GP and Fund Data • GP and LP Relationship Management • Mandate Origination and Execution Advisor Management 	<ul style="list-style-type: none"> • Syndication Tracking • Co-Invest Offerings • Debt Facilities • Fundraising • Investor Outreach • Pipeline Management 	<ul style="list-style-type: none"> • Single and Multi-Asset Deal Use Cases • Deal Funding, Lending, and Co- Investments • Deal Origination • Relationship Management • Portfolio Management

20+ CRM, FEATURE ENABLEMENT, AND DATACORTEX INTEGRATIONS

CRM	Feature Enablement	DataCortex Integrations	
<ul style="list-style-type: none"> • Affiliated Companies / Contacts • Builds • Office Locations • Conferences / Events/ Roadshows • Airport Hubs 	<ul style="list-style-type: none"> • Intapp Assist (AI) • Intapp Data • Relationship Scoring • Signature Parsing • Activity Capture • AutoCC 	<ul style="list-style-type: none"> • BoardEx • CapIQ (S&P Global) • DataFox • Dun & Bradstreet • Equilar • FactSet 	<ul style="list-style-type: none"> • Grata • Pitchbook • Preqin • PrivCo • Sourcescrub • Sutton Place Strategies (SPS)

MONARCH DELIVERS:

An unmatched track record— 1800+ projects, 375+ clients

Trusted and recommended by Intapp to hundreds of financial services firms as the premier DealCloud implementation, consulting, and support partner, we're ready to put our expertise to work for you and your firm.

We Implement. We Integrate. We Innovate. Whether you're just getting started with DealCloud, or are looking to unlock the platform's true potential, we can't wait to help you and your firm take flight.

Let Monarch tailor and optimize your DealCloud experience — **quickly, efficiently, and built to fit your firm's unique needs.**

Reach out today at monarchpsg.io/contact

monarch