core10

DealCloud Scales Rapid Growth with Core10 Talent

Challenge

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.

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

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

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

Solutions

Core10 was uniquely positioned to deliver talented Hereshore® implementation specialists who work in local communities. The ability to immediately integrate local talent curbs startup times through easy communication, time-zone alignment and specialized Fintech experience.

Additionally, the Core10 team trained extensively with DealCloud to thoroughly understand their market, system, and processes. Core10's specialists quickly learned to onboard large and small clients within the DealCloud eco-system and work with their DealCloud colleagues to ensure quality in all client interactions.

DealCloud has the flexibility to white-label Core10, providing a seamless client experience. Core10 members begin by working with client data to grasp the business so they can effectively configure the application to suit the client's needs. During this process, they consult with the client to customize the solution for specific use cases.

Core10 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 Core10 Solutions for DealCloud Included:

Trained and highly skilled staff focused solely 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

Results

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.

The DealCloud core staff now has the ability to focus on their highest value clients while tapping Core10 resources when they hit a ceiling on internal capabilities. This model keeps DealCloud nimble by providing highly skilled Core10 team members only when they need them. Moreover, Core10's autonomous team works effectively with minimal time or oversight from DealCloud.

In terms of performance customer success, it's a big win but it's also cost-effective as DealCloud does not require new staff hires to sit on standby. Through Core10, they source top talent on demand and at a benefit to their overall budget and existing staff who get support when they need it most. Core10 has stepped in to fill gaps and execute complex jobs, acting as a key ingredient in DealCloud's explosive growth.

DealCloud
An Intapp Company

"
Core10's team has allowed DealCloud 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**

Find out how you can meet your goals by using flexible and scalable developer talent from Core10.

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