MONSTRATO

FOR ADVISORY FIRMS AND INDEPENDENT CONSULTANTS

Specialist data capability. Within your client work.

Monstrato supports advisors serving national and regional brokerages. You bring client context and the broader advisory engagement; Monstrato brings data strategy and guidance for bounded implementation.

When to bring Monstrato in

A consequential operational decision is blocked by fragmented systems, inconsistent definitions, unreliable reporting, or uncertainty about useful applications of the client's data. Begin with the outcome the client needs.

Strategy before implementation

The first phase clarifies the business question and sources, identifies use cases, and establishes priorities and responsibilities. Implementation can follow under a separate scope after feasibility, resources, and acceptance criteria are understood.

How we collaborate

Agree the partner, Monstrato, and client responsibilities before quoting. The client knows Monstrato's role. Monstrato needs direct discovery and review access to leadership, an empowered sponsor, staff and systems access, and internal implementation ownership.

What the client can carry forward

A practical strategy and implementation sequence. Where implementation is included: validated reporting, reconciliation evidence, implementation records, and maintenance guidance. Continuing advisory supports a defined need; substantial engineering requires separate scope.

Commercial arrangements

A direct client contract following an introduction or a subcontract with the advisory firm can fit. Agree scope, relationship ownership, acceptance, change approval, payment, support, and any referral fee or partner margin explicitly. Infrastructure is client-funded. Discounts and exclusivity are not assumed.

Evidence and next steps

Agree named or anonymous case-study rights, confidentiality review, and attribution before contracting. Publication permission is separate from endorsement. Bring Daniel Rothamel a client question and the specialist support needed: monstrato.com/start-a-conversation or daniel@monstrato.com.