

# Intapp and UpSlide Partner to Make Client Deliverable Creation Easier for Financial and Professional Services Firms

*UpSlide and Intapp today announced a partnership that makes it easier for investment banking professionals to create high-quality client materials, faster.*

NEW YORK, NY, UNITED STATES, September 22, 2025 /EINPresswire.com/ -- [UpSlide](#), the Microsoft

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*Julien Villemonteix, CEO at  
UpSlide*

365 document automation leader, and [Intapp](#), a leading global provider of AI-powered solutions for professionals at advisory, capital markets and legal firms, today announced a partnership that makes it easier for investment banking and advisory professionals to create high-quality client materials faster. By connecting the Intapp DealCloud platform directly to PowerPoint through UpSlide, teams can quickly build accurate, polished deliverables directly within their deal and relationship management platform. For clients, this means they can spend less time on manual tasks and more time providing insights and strategic value.

Typically, investment bankers and advisory professionals must reformat and transfer important information and data between their CRM and PowerPoint manually, increasing the risk of inconsistency and inefficiency. Now, with Intapp and UpSlide seamlessly integrated, clients can redirect their time to more important tasks.

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This collaboration reinforces UpSlide's goal of saving investment banking professionals valuable time and streamlining manual work. It creates a more efficient workflow and provides bankers with confidence that their data is accurate and consistent across all materials.

“Through this collaboration, we’re helping clients turn data and insights into powerful pitch materials by making it simple to pull content directly from DealCloud into core Microsoft

applications. With UpSlide's ability to elegantly turn raw data into PowerPoint slides, teams can produce polished, compelling materials with minimal effort," said Brian Bissonette, Industry Principal for Investment Banking at Intapp.

Building on Intapp's extensive data, technology and services partnership network, UpSlide will be joining the more than 140 partners who are already dedicated to helping firms maximize ROI from their technology investments. Additional partners include Pitchly, Leverest and Atominvest.

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#### About UpSlide

UpSlide is an AI-enabled presentation automation add-in for Microsoft 365, combining ease of use and reliability with premium setup, seamless integration, and high adoption for long-term success. For the last 14+ years, UpSlide has been helping some of the most well-known companies in financial and professional services to boost productivity, while improving brand consistency across their corporate documents. As a Microsoft Solutions Partner, UpSlide brings together expertise from the tech, finance and design fields to help clients like KPMG, UniCredit, BNP Paribas, Rothschild & Co., and many more to improve their processes and empower staff to focus on more rewarding tasks. UpSlide is a certified B Corporation, upholding the belief that businesses should have a positive impact on society. For more information, visit [upslide.net](https://upslide.net).

#### About Intapp

Intapp software helps professionals unlock their teams' knowledge, relationships, and operational insights to increase value for their firms. Using the power of Applied AI, we make firm and market intelligence easy to find, understand, and use. With Intapp's portfolio of vertical SaaS solutions, professionals can apply their collective expertise to make smarter decisions, manage risk, and increase competitive advantage. The world's top firms - across accounting, consulting, investment banking, legal, private capital, and real assets - trust Intapp's industry-specific platform and solutions to modernize and drive new growth. For more information, visit [intapp.com](https://intapp.com) and connect with us on X, formerly Twitter (@intapp) and LinkedIn.

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