DEEP DIVE COMPARISON

Intapp Celeste vs. Venntive

A five-layer stack built to reason across its own seams, versus one system with no seams to reason across. What "Firm AI" costs when it's assembled from parts — and what it costs when it isn't.

AGGREGATED CRM PLATFORM

The Setup

In August 2026, Intapp introduced Celeste — described as "the agentic platform for Firm AI" — alongside a strong Q4 FY26 earnings beat and a $50B market-opportunity pitch. The presentation is confident, and the underlying business is real: $590.5M in total ARR, 84% of it cloud-based.

But the architecture the slides reveal is worth reading carefully, because it explains a problem professional services firms are already living with — before Celeste ever gets involved.

What Celeste Actually Sits On Top Of

Celeste is not a single product. It is an orchestration layer sitting above:

- **An INTAPP Data Foundation** — the underlying data layer the rest of the stack depends on
- **"Walls for AI"** — a separate compliance/governance layer to enforce ethical walls, MNPI controls, and conflict screening on top of the data layer
- **Growth pillar** — DealCloud, a deal-pipeline CRM originally built for private equity and investment banking
- **Compliance pillar** — Intake, Conflicts, Terms
- **Profitability pillar** — Time, Billstream
- **Bolt-on general AI** — Celeste explicitly "enhances rather than replaces" Microsoft Copilot, Anthropic's Claude, and Harvey, layering firm-specific context on top of all three

> **IN PLAIN TERMS**
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> Celeste is an AI system whose primary job is reasoning across the gaps between Intapp's own other products — plus three external AI vendors it doesn't own. That's not a criticism of the engineering. It's a description of what happens when a platform is assembled from acquired and separately-built modules over 25 years, then asked to behave like one system.

What It Costs to Assemble a Tower Like This

Intapp doesn't publish blended pricing, and every enterprise deal is custom — but the structure of the stack tells you where the costs stack up too. Each pillar (DealCloud, Time, Billstream, Intake/Conflicts) has historically been sold as its own licensed module. Add the Data Foundation and Walls for AI governance layer as underlying infrastructure, add Celeste as a further licensed orchestration layer on top, and add per-seat costs for whichever of Copilot, Claude, or Harvey a firm already carries — and the real cost of "Firm AI" is the sum of a module count, not a single line item.

Picture wooden building blocks, or a game of Jenga: every additional block is a separate purchase, a separate contract, a separate vendor relationship to manage — and a separate point where the tower can wobble when one piece doesn't fit the way the business actually works.

Where the Tower Wobbles: Relationship-Driven Firms

A partner at a patent and IP law firm put the problem plainly: his marketing team is using DealCloud, and it isn't working for them.

That's the predictable result of the architecture, not a training gap. DealCloud was built for deal pipelines — sourcing, diligence, a defined close — which is exactly why PE and investment banking firms run on it well. A patent and IP practice doesn't move prospects through a pipeline with a close date. It runs on relationships and referral networks built over years. Put a relationship-driven marketing team on a deal-stage data model, and it will fight them every day, because the underlying schema was never built to answer the questions marketing actually has: who do we know, how are they connected, who owns this relationship.

Celeste's Context Engine is Intapp's attempt to paper over exactly this — reasoning across DealCloud, the compliance pillar, and the profitability pillar to reconstruct a fuller picture in real time. It's a genuinely sophisticated answer to a problem the architecture created in the first place.

Data Security & Compliance: What the Slides Didn't Address

Nowhere in Intapp's Q4 FY26 presentation is there a treatment of what the Celeste architecture means for data security and regulatory compliance — a notable gap for a platform being sold to law, accounting, and consulting firms bound by privilege and confidentiality obligations. The gap follows directly from the architecture itself:

- **Sub-processor exposure, per vendor.** Every hop to DealCloud, the compliance pillar, the profitability pillar, or an external AI vendor (Copilot, Claude, Harvey) makes that vendor a sub-processor of client data. Whether each one is actually covered by a current data processing agreement, and what each does with the data it touches, is a separate question per vendor — not one answered once for the platform as a whole.
- **Privilege risk compounds per hop.** Routing privileged client information through multiple external systems raises work-product questions at every hop unless each is contractually and technically buttoned down. One vendor is one place this can go wrong. Intapp's stack has five or more.
- **"Walls for AI" governs Intapp's own pillars — not its outside vendors.** The governance layer can enforce consistent rules across DealCloud, Intake, Conflicts, Terms, Time, and Billstream. It generally cannot govern what Microsoft, Anthropic, or Harvey do with data once Celeste has routed it to them for reasoning — that's each vendor's own contract and security posture, audited separately.
- **Breach surface multiplies with every integration.** A credential compromise or misconfiguration at any one of five-plus integration points is a way into the whole picture, not just at Intapp's core.

> **THE COMPLIANCE OFFICER'S ACTUAL JOB**
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> In a bolted-together stack, "is our platform secure" becomes "is our platform secure, and is Vendor A's DPA current, and does Vendor B retain data for model training, and is Vendor C's sub-processor list itself up to date" — repeated for every AI tool plugged into the stack. That's not a smaller version of the job. It scales with every integration added.

Venntive's closed architecture doesn't need a governance layer to reconcile multiple vendors' data practices, because there is only one vendor's practices to account for. AI (NOVA) reasons over data inside the same closed environment the data already lives in — there's no sub-processor chain to audit for AI functionality specifically. Fewer integration points isn't a smaller feature set. It's fewer places where a firm's compliance posture depends on someone else's contract, someone else's retention policy, someone else's breach history.

Side-by-Side

	Intapp Celeste (+ stack)	Venntive
Core architecture	Orchestration layer above 5+ separately-built/acquired products	✓ One platform, one UI, one database
Data model	Distinct per pillar; reconciled by AI at query time	✓ Single data model — nothing to reconcile
Relationship-driven marketing fit	Runs through DealCloud's deal-pipeline model	✓ Native — not adapted from a pipeline tool
AI dependency	Requires Copilot, Claude, and/or Harvey as external inputs	✓ AI (NOVA) built into the platform itself, in a closed environment
Feature gating	Modules licensed and priced separately	✓ Features never paywalled behind tiers
Compliance layer	Separate "Walls for AI" product; governs Intapp's own pillars only	✓ Governance built into the single platform, not bolted on
Sub-processor / DPA exposure	Separate exposure per module and per external AI vendor (up to 5+)	✓ One vendor to account for
Best fit	PE, investment banking, deal-flow-driven firms	✓ Relationship-driven professional services (law, accounting, consulting) and owner-operated B2B firms
Vendor count to run "Firm AI"	Intapp + up to 3 external AI vendors	✓ One vendor

Pricing details reflect publicly disclosed product structure as of Intapp's Q4 FY26 investor presentation (August 2026); Intapp does not publish blended module pricing.

Revenue-Team Relevance, Not Just Marketing

This isn't only a marketing problem. When relationship data, deal or engagement history, and time/billing live in different systems built for different purposes, every revenue-team question — who owns this account, is there a conflict, what's the real pipeline, who should make the next call — requires the same cross-system reconciliation Celeste is built to paper over. A revenue team working out of one database never has to ask whether the numbers agree, because there's only one set of numbers.

Verdict

Choose Venntive if...

Your business runs on relationships, not a defined deal-close — law, accounting, consulting, or any owner-operated B2B firm that needs marketing, sales, and delivery working from one source of truth without stitching together multiple vendors and AI tools to get there.

DealCloud/Celeste earns its place if...

Your firm's core motion is genuinely deal-flow — sourcing, diligence, a defined close — and you're already committed to Intapp's module stack and comfortable managing coordination across Copilot, Claude, and/or Harvey on top of it.

THE BOTTOM LINE

Celeste is Intapp telling on itself: a $50B AI opportunity built to reason across the seams between five products that were never one system to begin with. Venntive starts from the other end — one platform, one database, no seams to paper over. For relationship-driven firms, that's not a smaller version of Celeste's ambition. It's the version that doesn't need an AI layer to hold itself together.

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