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INCEPTION

San Francisco | May 15 — 18

In Focus — for Risk Leaders & Risk Staff

Who Should Attend?

- General Counsel
- Risk Partners (Ethics, Loss Prevention)
- Risk Leadership
- Business Intake Management & Staff
- Conflicts Managers
- Compliance Officers & Professionals
- Other Risk Management Experts & Staff

Conference Highlights

Offering unique content, peer exchange and education, Intapp Inception brings together a unique mix of risk and technology expert — spanning both leadership and operational roles.

On Wednesday, May 17, we're presenting a dedicated program track co-sponsored by the Risk Roundtable Initiative, specially tailored for [law firm general counsel and risk management teams](#).

Attend this track in conjunction with sessions on Intapp Open and Intapp Walls to learn more about how to put these high level risk initiatives into practice at your firm.

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You're Invited :



GC Breakfast

On the morning of Wednesday, May 17, we will be holding an invite-only breakfast for law firm general counsel, associate GC's and partners holding risk leadership positions, prior to the official start of our general Risk Roundtable program track. Attend this breakfast session to connect with your peers and Intapp's executive team, and hear from a panel presentation from several industry risk experts. We will conclude the session with an open group discussion.

Wednesday, May 17, 7:30am—9:00am

Please RSVP to Tammy.Kim@intapp.com to reserve your spot.



Special Offer — GC Day Pass (for Law Firm Partner Risk Leaders)

We know that general counsel and risk leaders are busy, and attending a three-day conference is not always practical. We have designed our Risk Roundtable program to deliver key risk management content that risk leaders care most about in a single day, rather than spread throughout the conference. While we encourage attendees to stay for the full Inception experience, we are offering a **limited number** of day passes for partner-level law firm risk leaders who wish to attend only the Risk Roundtable program on Wednesday, May 17.

Fee: \$499

Please email Tammy.Kim@intapp.com for more information.

(Your Biggest Risk is Not Attending...)



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Session Focus: Risk Roundtable

Risk GC Breakfast Recap & Community Discussion

By popular demand, we're hosting a panel discussion that will share the distilled highlights from our General Counsel breakfast and continue that discussion across our cross-functional customer community. This session will share what's top of mind in the minds of participants including a risk consultant, insurance expert and several GCs. Attend to hear what keeps them up at night — and what they think should be keeping you up too — and to add your voice to the risk community dialogue.

Wednesday, May 17, 11:15am—12:15pm

Risk Staffing Approaches: Conflicts & Beyond

Rigorous risk response requires sane policies and, of course, suitable supporting software. But risk can't be managed optimally without the right resources and staff, organized effectively. This panel will review the latest industry thinking on staffing business acceptance teams. It will discuss the "hows" and "whys" behind different approaches firms take to organize staff (e.g. centralized vs decentralized), scoping the team charters (e.g. holistic client and business evaluation vs. distributed, siloed analysis), and skills alignment (e.g. lawyers vs. not). It will also explore why firms adopt different approaches in different environments (and why those change — sometimes dramatically — over time).

Wednesday, May 17, 1:30pm—2:30pm

Enhancing the Business Impact of Risk Management

"Risk is just the 'Department of No,' always blocking and slowing us down," say the unenlightened. It's a tough reputation to bear — controlling risk is critical to the long term success of any organization. But the realities of managing it long term often conflict (pun partially intended) with the (often rational) short term objectives of stakeholders with competing interests. What if there were ways to transform how risk was perceived, prioritized and privileged with your firm? What if you could position risk as a pathway to revenue? (And what are the risks of not pursuing such a path?)

Wednesday, May 17, 3:00pm—4:00pm

Less Risk, More Reward: Making the Business Case for Investing in Risk

Whether it's for new technology, new staff positions, or new policies and practices — it's no secret that making the case for investing in risk management can be challenging. But it's critical to the long-term health and success of every firm, and a cause worth advocating for. This panel will explore different strategies and approaches leaders have pursued to win mindshare, budget and support for risk initiatives. What are the "slam dunk" scenarios? What are the best arguments to make? Where's the best place to start? Come hear real-world stories and advice from your peers — and bring your own to share as well.

Wednesday, May 17, 4:30pm—5:30pm



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Other Risk Sessions at Inception

Client Development, Client Requirements, Client Success

Client-imposed terms of business have been among the leading risk concerns for law firms since the 2008 financial crisis. As clients issue increasingly stringent guidelines, it's critically important that firms take their compliance responsibilities seriously not only to reduce risk, but to also ensure a successful relationship with their clients and enable effective business development. This panel will feature speakers who will discuss approaches to managing client requirements, including collecting terms of business documentation; staffing to review client commitments and negotiate responsibilities; areas of critical concern (e.g. Risk, Finance, Information Security, Practice Management); measuring and monitoring compliance; and process maturation as part of a successful client service regime.

Wednesday, May 17, 11:15am—12:15pm

Finding Treasure: Client Evaluation, the Next Level

One upon a time, business intake was about just that — getting conflicts cleared and matters approved (ideally before lawyers started work). Today, that landscape is shifting — and in ways that create both new challenges and new opportunities for firms. By incorporating more comprehensive client evaluation practices (without slowing down the intake train), firms can better improve their overall performance. Evaluation can start with client credit worthiness and can grow to include more sophisticated, automated client scoring, weighting, review and evaluation based on criteria including: professional risk, financial suitability, strategic alignment, resource alignment and more. All that's required is the strategy, system and insight to make it a reality...

Wednesday, May 17, 1:30pm—2:30pm

Information Security: Trends & Drivers

It feels like each of the past several years has been “the” year of security. While convenient clickbait, it's time to call it — the decade (or even century) of security is upon us: International Hackers. Spear Phishing. Government Surveillance. Data Leakage. Lateral Removals. Malware. Accidents. Internal Malfeasance. ISO Certification. The Cloud. Encryption. Training. Cyber-insurance. Confidentiality Management. Client Audits. Something else. What's most important to understand and respond to in 2017? This panel will explore. Bring your stories, opinions and questions.

Wednesday, May 17, 1:30pm—2:30pm



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Security & Confidentiality: Why Walls Matter More Than Ever Today

Intapp Walls has transformed the way the industry manages the entire confidentiality lifecycle. A decade ago, firms adopted the product primarily for ethical screening. Today, new developments (e.g. hybrid security models, HIPAA, OCGs and other new regulations) are pushing firms to take information governance and data protection more seriously, and adopt more complex layered enforcement models. This session will review these drivers and show how Intapp Walls enables your firm to respond effectively.

Wednesday, May 17, 3:00pm—4:00pm

Client Intake, Conflicts & Compliance: Advanced Topics

Risk professionals are typically in “the room where it happens,” where “it” are some of the most critical decisions a firm makes. And when it comes to business acceptance, the rules are evolving, internal tolerances are changing, and new trends are emerging. Join us in this room of risk experts, who will talk about these changes, with a specific focus on compliance topics like Anti Money Laundering (AML), Client Due Diligence (CDD), and more. If you think these issues don’t affect your firm today, you might technically be right. But tomorrow, as globalization and standardization increase, what comes next could be a world turned... a new direction. Best be ready for it, and understand how your existing Intapp investments can help.

Wednesday, May 17, 4:30pm—5:30pm

Migrating from Legacy Conflicts Systems to Intapp Open

Whether due to (rumored) product end of life, a practice management system migration, or a firm focus on enhancing overall business intake efficiency, many organizations are looking to move from their legacy conflicts system to a modern solution. This panel will review the reasons, approaches, lessons and benefits they’ve discovered in transitioning (from systems including LegalKEY, Elite and Aderant) to a more modern conflicts management solution (Intapp Open).

Thursday, May 18 11:00am—12:00pm



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Better Business Acceptance: Integrating Third-Party Data into Intapp Open

Today, efficient and effective conflicts review and client/matter evaluation requires the right breadth and depth of information necessary to make informed decisions. Intapp Open allows firms to natively integrate data from third-party suppliers of corporate tree and other information. Attend this session to hear the latest about how we are working with partners and enhancing our software to continue to deliver new levels of information and insight to firms.

Thursday, May 18, 1:00pm—2:00pm

Taking Business Intake to the Next Level (You have the Power)

When we created Intapp Open, it was part of a dream to enable firms to maintain, manage and extend their own workflow environment themselves. Gone would be the days of filing (expensive) change orders with consultants and waiting (and waiting) for updates to go live. Today, that dream is real — firms are managing their own intake systems, building and customizing their own forms (fast), and (often) challenging us to keep up with their innovative new ideas. But don't take our blurb for it — Come hear from firms that have successfully taken matters (pun slightly intended) into their own hands with Intapp Open.

Thursday, May 18, 2:30pm—3:30pm

"The Intapp Inception conference brings together a unique mix of professionals... What I find especially valuable was that the conference went beyond products and best practices to also discuss bigger picture industry trends and demands — inspiring all of us to think how to best influence our firms' success at a more strategic level.

— Director of NBI and Conflicts, 1000-lawyer firm based in California

"The conference was the best I've been to... well done."

— Director of Info Governance, 150-lawyer firm based in Western US

"My colleagues and I had a fantastic time at the conference and learnt a lot about Intapp... We look forward to attending the conference next year!"

— Compliance Officer, 450-lawyer firm based in London

"Inception has been a world class event, and I'm returning home galvanized and excited for what's in store... I've had meaningful conversations with my counterparts at other firms, and am grateful for the opportunity. This is a pretty exciting time."

— Head of Client Intake, 500-lawyer firm based in Eastern US