# Intapp Terms

Coming to Terms with Tougher Client Requirements

With clients issuing increasingly stringent guidelines, it's critically important that firms take their compliance responsibilities seriously. But in practice, keeping up with every rule and condition across multiple clients and matters can seem impossible. Agreements typically aren't centrally stored or easily accessible, and many firms have an extensive backlog of documents waiting to be classified with limited resources to do so, which means that lawyers and staff are often unaware of the firm's obligations — which translates to real risk.
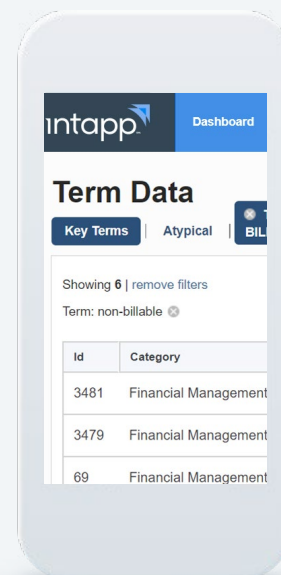
It's not uncommon to hear stories of outside counsel guideline documents and engagement letters ending up in a drawer — metaphorically or even literally. Or of cases where potentially alarm-raising mandates, like indemnity clauses, go overlooked without proper review and consideration.

In today's environment, no firm can tolerate the risk of missing a critical detail and facing an unwelcome surprise when clients come knocking. Accidental or not, the implications of compliance failures include damaged client relationships, exposure to liability, financial loss and other professional fallout.

Clients Rule — So Deliver a Consistently Exceptional Experience

Ideally, everyone in the firm who interacts with clients — whether it's lawyers, finance, general counsel, risk or IT teams — should be aware of their specific rules of engagement and how they impact day-to-day service delivery. And everyone should also have a clear understanding of what success means to each client, top of mind and at their fingertips. Intapp Terms makes this both possible and practical.

Available as a standalone product, or integrated with the full Intapp Business Acceptance suite, Intapp Terms assists with the categorization of client terms of business and centralizes information on client commitments to facilitate management and visibility— giving firms peace of mind that these require-ments have been captured, and enabling them to better understand the client terms they have agreed to. By communicating these obligations to partners, matter teams and staff, and enforcing key requirements within the software tools they use to perform work, Intapp enables entire organizations to effectively deliver on the promises made to clients.

Client Success — It's All About Visibility

The Intapp terms of business management system provides a structured approach for storing, indexing and then enforcing client mandates, as well as other internal firm requirements.

Client commitments are easily accessed without the need for reviewing long documents. With a few keystrokes, a conflicts lawyer or staff member can find details about any specific term in place with a client, or retrieve information about a specific category of commitments across all the firms' clients. What used to take hours of reading multiple documents to find the information needed, can now be done in minutes through the Intapp terms of management system's powerful search and filtering capabilities.

Integration with other law firm systems helps to weave client requirements and compliance into the fabric of everyday business operations.

For example, a lawyer submitting a new matter intake request can be automatically shown relevant terms of business previously agreed with the client. When running a conflicts search, competitors identified in clients' outside counsel guidelines can be automatically flagged as black book entries.

Intapp: Terms of Business Management — Features and Benefits

The Intapp terms of business management system brings structure and visibility to previously disorganized and siloed terms management processes. Key features and benefits include:

Centralization and Categorization of Terms

- Assisted categorization of terms using sophisticated artificial intelligence and machine learning algorithms reduces the time to ingest terms documents by 66%
- Structured terms database to identify, capture and index terms information from multiple sources
- Ability to handle documents and terms that are still in negotiation, and those that reflect finalized commitments
- Terms of engagement highlighted on main screen with quick access to the most important commitments
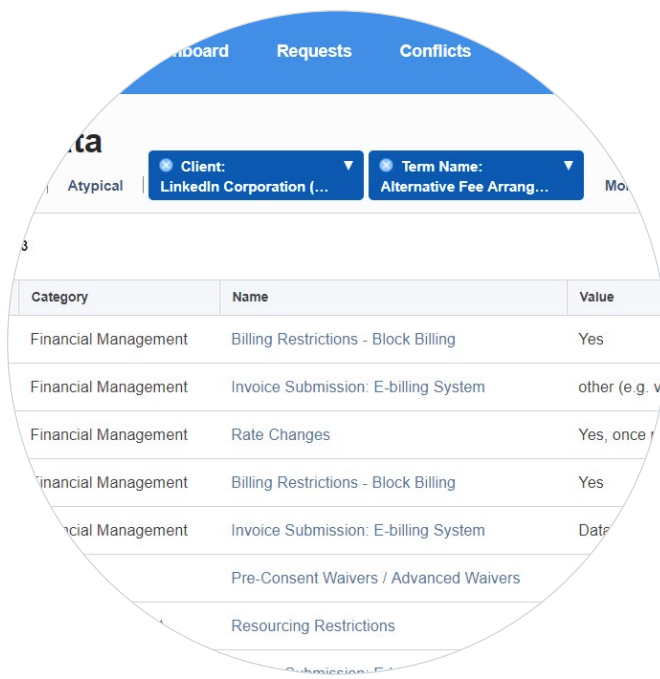
- 65 terms templates provide a quick start to categorizing clauses consistently
- Prioritization of terms most important to firm and client teams
- Ability to flag exceptions to standard firm policies

Visibility and Notifications

- Search by client, term category or industry for quick access to relevant client commitment documents and status
- Send notifications to key stakeholders when terms have been updated or changed
- Highlight and provide links to relevant sections of client documents to display terms in context
- Build differentiated communications to individuals, lists and category-based groups
- Automate notifications to alert stakeholders to upcoming deadlines

Powerful Analytical Tools

- Analyze frequency of terms, variation and other trends across industries

- Identify most frequently agreed-to terms by category

Terms Compliance and Enforcement

- Communicate policies, ground rules, "do's and don'ts" to relevant actors

- Facilitate enforcement by disseminating commitments across key workflows — e.g. business intake, conflicts searches, ethical walls, time recording, and more.

Terms Management — On Your Terms

The Intapp terms management system is available as a standalone system — in the cloud or on-premises — or integrated with the Intapp business acceptance suite.

Interfaces and connections with other Intapp products, including Intapp Walls and Intapp Time, make it easy to set and enforce policies across key workflows. In addition, Application Programming Interfaces (APIs) support integration with third-party products and tools.

By complying with client rules — effectively and efficiently — firms can reduce the risk of billing disputes and loss of client trust, without the administrative hassle of tracking client terms via unwieldy spreadsheets.

Most importantly, firms can move toward a more proactive, strategic approach to terms management, enabling them to negotiate terms of business from a position of confidence and knowledge, and focus on delivering an exceptional client experience.