



DATA SHEET

Intapp Intake for Engagement Letters

Engagement Letter Management – Reduce Risk, Protect Revenue

In today's complex business environment, law firms that take on new matters without clearly documented engagement terms are playing a dangerous game. The days of handshake agreements and unspoken understandings are over – the stakes are simply too high. To reduce the chance of client billing disputes, mitigate the very real and increasing risk of malpractice claims, and address growing scrutiny by insurers, law firms must more effectively and consistently use engagement letters.



Yet most firms struggle to incorporate engagement letters into their standard new business acceptance process. According to the 2014 Risk Roundtable survey, only 38% of law firms report having automated this critical activity.

Firms typically identify several barriers to standardizing the use of engagement letters. Culture can be a significant factor if clear policies and requirements are lacking, or if lawyers expect great personal latitude during matter intake, compliance naturally suffers. But technical barriers loom even larger if a firm lacks the capability to effectively manage engagement letters as part of business intake, it lacks the basic building blocks necessary to succeed in adopting their use at any scale.

The building blocks of success include: clear policies and management expectations, letter templates and standards that clearly define firm expectations (to avoid ad hoc approaches), and a clear exceptions process (for one-off instances when terms

must be re-negotiated). But most of all, the overall process must be integrated into the very fabric of new matter intake. And to do that, it must be automated – so that there is no additional complexity, delay or hassle for lawyers and staff, and so that firm management has greater visibility and control over the entire business review and acceptance process.

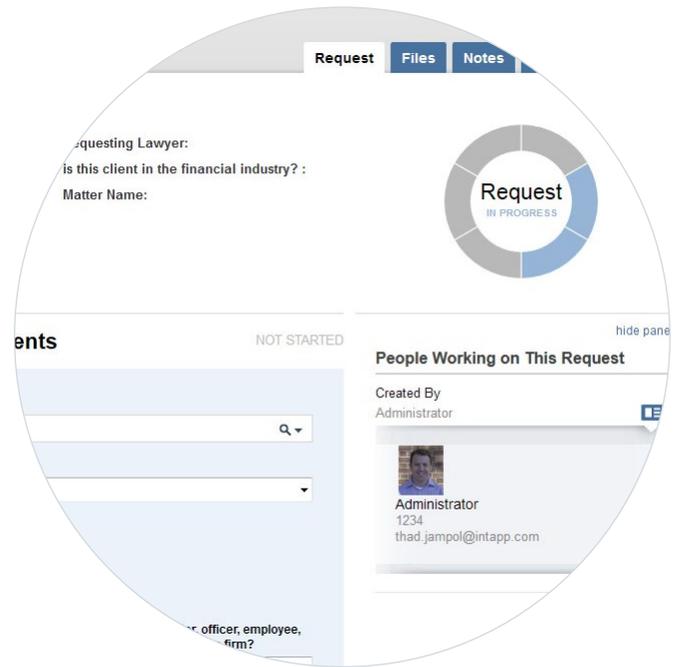
Intapp Intake for Engagement Letters – Making it So

Adopted by over 100 law firms (ranging in size from 65 to 4200 lawyers), Intapp Intake has redefined business acceptance with a fresh approach built to address the specific needs of firm management, lawyers, risk staff and IT. And now Intapp gives firms the ability to automatically draft and manage engagement letters as part of their standard business inception process.

With integrated engagement letter management:



- **Automatically generates** draft engagement letters for new matters, using data gathered during the normal business intake process (or additional information gathered through questions integrated into normal form/workflow activity)
- **Supports multiple templates**, using the relevant option based on firm-defined business rules (e.g. matter type, geography, jurisdiction)
- **Integrates document assembly**, leveraging a firm's existing investment in HotDocs or ContractExpress; or allowing organizations to secure a document assembly tool licensed for engagement letters
- **Manages review and approval** of draft letters as part of the overall new matter review and business acceptance process
- **Attaches generated letters to intake requests**, creating a clear record and audit trail



Engaging Possibilities

Intapp Intake makes it easy to broaden the use of engagement letters by tightly integrating and automating drafting and tracking activity as part of new matter inception.

With Intapp Intake, organizations can:

- Increase the overall use of engagement letters so that firms reduce risk, protect revenue and provide clients with clearly defined standards and expectations of conduct
- Increase efficiency (and lawyer satisfaction) so that lawyers can generate letters with ease without adding overhead to the business acceptance process

- Increase the consistency of engagement terms so standard conditions become the norm – with templates that can be modified globally (or per-matter when necessary)
- Address insurer priorities so firms can demonstrate consistency to underwriters looking for strong engagement letter practices to better limit risk

Engagement Letters in Brief

Engagement Letters define the relationship between a firm and client, typically spelling out:

- The scope of the matter and the firm's duties of representation
- Specification of related and adverse parties
- Financial details including cost, fee model, billing structure and payment terms
- Dispute resolution mechanisms, should firm and client encounter significant issues
- Conduct standards (e.g. records retention and destruction, mutual communication duties)
- Disengagement terms, particularly in situations where clients fail to pay bills

Engagement letters limit risk (e.g. malpractice) and protect revenue (e.g. billing disputes).