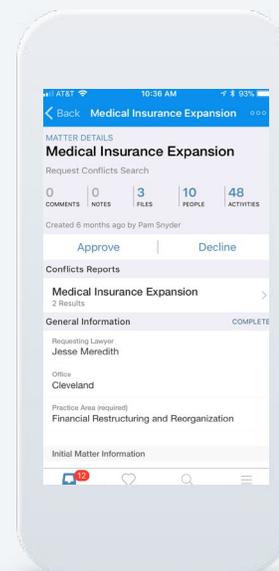# Intapp Intake

New Business Acceptance is Broken — Intapp Intake Fixes It

Efficiently taking on new clients and matters is critical to the practice of law. Today, a number of market trends are putting pressures on law firms to transform the way they evaluate and engage new business, and how they manage those relationships throughout the client lifecycle:

- **Clients** are increasing customer service expectations and demand a swift response to more stringent pricing requirements, terms of engagement and out side counsel guidelines.

- **Firms** are looking to increase the sophistication and agility of intake processes to better align client selection with overall business strategy, service models and internal policies.

- **Risks** are proliferating, driven not only by professional standards and client mandates, but also by evolving regulatory rules that increasingly extend compliance requirements to law firms.

Intake Must Evolve

Remaining competitive in this challenging environment requires a simplified, refined and innovative approach to new business inception. This innovation must address not only how intake processes are designed and executed, but also how they are up-dated and adapted over time in response to changing needs, how individuals interact with the software used to administer them, and how the entire system enables management of the complete client engagement and matter lifecycle. In short, inception must evolve.

To successfully address the strategic needs of the firm (and, by extension, its clients), this evolution must enable more efficient, flexible and information-driven business acceptance procedures. And, more importantly, it must also address the operational needs of lawyers, risk staff, marketing and IT — stakeholders whose participation, input and satisfaction are critical to the process.

Intapp Intake - The Industry Standard

Intapp Intake is the leading business acceptance solution for law firms – adopted by more than 200 customers worldwide. Leading firms today are using Intapp Intake to enable faster, more efficient, information-driven client evaluation processes that align new business intake with the firm's own strategic goals – and position their client engagements for success.

Intapp Intake supports:

- 40,000+ lawyers
- 6 million clients
- 25 million matters
- 8,000 requests per day

Intapp Intake Principles — Complete Business Acceptance Lifecycle Management

Intapp Intake is a true new business intake application. Instead of providing firms with complicated tools and a services team eager (and incentivized) to design, build and bill for custom development and change orders (both during initial implementation and throughout the life of the project), Intapp took a fresh approach.

Working with a customer community that spans firms with as few as 40 and as many as 4200 lawyers, Intapp looked extensively at what was wrong with new business inception, and then built software from the ground up designed to fix it. Intapp Intake is the result. It's designed specifically for new business acceptance and delivers on common sense principles, squarely focused on enabling law firm success:

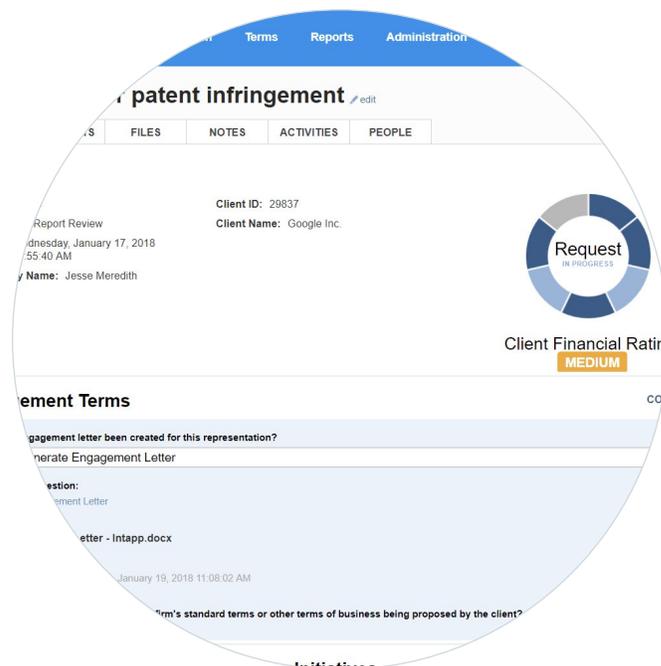## 1. It Puts Firms in Control — Fast, Responsive, Cost-Effective

Intapp Intake delivers on the simple notion that business users should be able to quickly and intuitively design, implement and change business processes — without having to pay for vendor consultants, issue change orders, wrestle with external tools, or wait for IT to custom code updates. The business landscape changes rapidly — intake needs to be able to do the same.

2. It's Built Specifically for Intake — Not a "Build Your Own Adventure"

Intapp Intake is and an intake application that allows users to create and change processes, while preserving IT's ability to set and enforce necessary ground rules. To enable best practices, it also includes templates and a rich question library developed by an advisory group of law firms, insurance providers and industry experts.

3. It Makes Broad Adoption Easy — Made for Everyone to Use (and Love)

Intapp Intake provides management, lawyers and risk staff with the consumer-grade experi-ence they expect from modern software. It's attractive and intuitive. And it delivers infor-mation intelligently, with role-specific views and to-do lists. The net result is that those who participate in the process will finally enjoy the experience.

4. It Intelligently Manages Information — Integrates People, Process & Data

Intapp provides the industry standard for application and data integration. Intapp Intake leverages this experience and technology to connect with key firm business applications, to eliminate double data entry and to automate post-inception setup of workspaces and tools used by lawyers to collaborate and create work product.

5. It Extends Beyond Inception— Offers Complete Client Lifecycle Management

Business Acceptance doesn't end at inception. Intapp Intake enables firms to identify and respond to changes to client or matter disposition that could impact the financial, ethical, regulatory or strategic alignment of the engagement with firm standards. Intapp Intake provides a fully configurable monitoring rule designer as well as native support for common use cases.