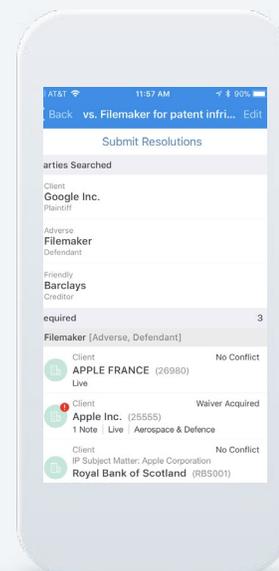


## The Business Acceptance Lifecycle: A Comprehensive Approach

Efficiently taking on new business while managing regulatory, financial, and reputational risks is critical for the success of law firms. Today, increasingly stringent regulations, escalating client demands, and internal pressure to align client selection with the firm's strategic objectives are compelling firms to transform the way they evaluate and engage new business, and how they manage those relationships throughout the client lifecycle.



Intapp Business Acceptance is a business acceptance solution that enables firms to evaluate and continuously monitor their client relationships to support firm financial health, growth targets, risk management priorities and business objectives.

It offers an integrated platform to manage intake forms and workflows, conflicts clearance, engagement letters, AML/KYC compliance, client terms of business, and ongoing monitoring and alerting from a single interface, in the office or on the go. Intapp Business Acceptance also fosters collaboration, providing role-specific views where risk stakeholders, system administrators, lawyers, and management can manage their individual tasks or reports in the context of the entire process.

### Benefits

- Reduce time to open a new client or matter
- Clear conflicts faster, with greater confidence

- Evaluate potential clients with more rigor
- Capture client terms of business and automate compliance
- Support a mobile workforce
- Manage relationships throughout the client

### Intake

Every firm has a process for business acceptance, but often those processes are manual and inefficient or rely on cumbersome workflow tools that require extensive in-house IT expertise or external consulting services. And none of them are sophisticated enough to address the increasing challenges facing the legal industry.

Intapp Business Acceptance enables firms to weave business strategy into execution. It provides a configurable interface to design, execute, maintain, and modify intake forms and workflows.

Firms can leverage native templates and a rich library of intake questions developed by industry risk management experts for a best practices approach to business acceptance.

Intapp Business Acceptance drives efficiency throughout the business acceptance process by enabling firms to streamline and automate intake workflows and enforce policy execution. And it's designed to support broad adoption, with intuitive role-specific dashboards to facilitate transparency and a full-featured mobile app where lawyers can submit, review, and approve requests.

### Conflicts

Managing conflicts is integral to business acceptance and lateral in-take at every law firm. To succeed in a competitive legal landscape, firms must consider not just whether they can take on new business, but whether it's in the firm's best interest to do so. In addition to traditional ethical conflicts, firms must address a diverse set of scenarios including business conflicts, positional conflicts, subject matter conflicts, and playbook conflicts.

Intapp Business Acceptance centralizes conflicts resolution for faster clearance and greater confidence. It provides an interactive conflicts report that integrates data from internal systems and third party content providers so analysts can run a single search. And it's integrated seamlessly into the overall business acceptance process to streamline and consolidate internal communication.

Conflicts reports are accessible in multiple formats on multiple devices to support lawyers with varying work styles. Intelligent business rules enable results to be ranked and flagged based on relevance and risk, and hits are presented in a simple user friendly view that allows lawyers to filter results, quickly find the critical hits, and expand for more detailed information.

### Active Monitoring & Alerting

Business acceptance doesn't end with onboarding. Firms must monitor their client relationships on an ongoing basis to ensure they continue to meet the financial, ethical, reputational and strategic standards set at intake. Firms typically struggle to monitor these client health indicators in a centralized manner, relying on manual processes and piecemeal alerts set up in disparate systems.

Intapp Business Acceptance provides a configurable monitoring and alerting rule designer with native support for common financial and risk threats that require action post-intake, including WIP alerts, negative news, AML checks, and more. Firms can enable scheduled and event-triggered workflows to facilitate review, escalation, and resolution in response to adverse events.

These capabilities enable firms to streamline regular matter

maintenance by automating processes such as matter closing when a matter is inactive for a specified amount of time. Critically, it also enables firms to define custom monitoring rules for high risk matter types to kick off alerts in response to certain activity and, where appropriate, automatically take proactive action to resolve the threat.

### Terms of Business

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, which means that lawyers and staff are often unaware of the firm's obligations – which translates to real risk.

Intapp Business Acceptance provides a structured approach for storing, indexing, analyzing, and enforcing client mandates. Its powerful AI engine assists with the categorization of terms to dramatically reduce the time it takes to collect and classify client obligations. These terms are stored in a central repository where they can be viewed and reported on by client, category, or industry to allow for full visibility.

Deep integration with firm systems enables the enforcement of client obligations. For instance, staffing and billing requirements can be integrated with time entry and financial systems to proactively enforce restrictions before bills are rejected or written off, and mandates such as competitor restrictions can be integrated with the Intapp Business Acceptance conflicts management system to avoid taking on new business that could harm existing relationships.

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*"Intapp Business Acceptance provides us with a framework to maintain the system ourselves, so instead of waiting for a developer to write a report that was part of the executable, now we have the power to create the reports ourselves. If we need to make modifications to forms or even the workflow, we now have the power to do that ourselves."*

**RISK MANAGEMENT MANAGER, DICKINSON WRIGHT**

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