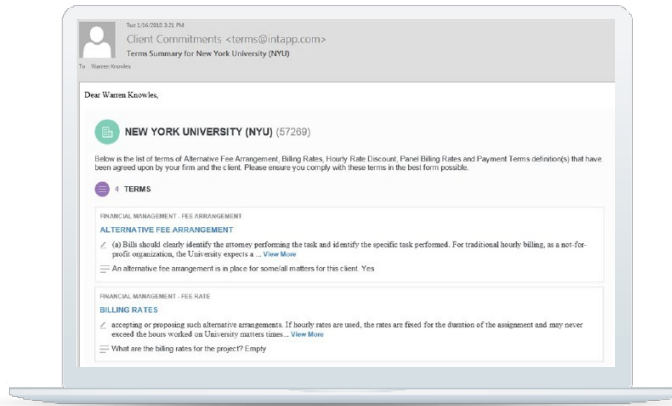
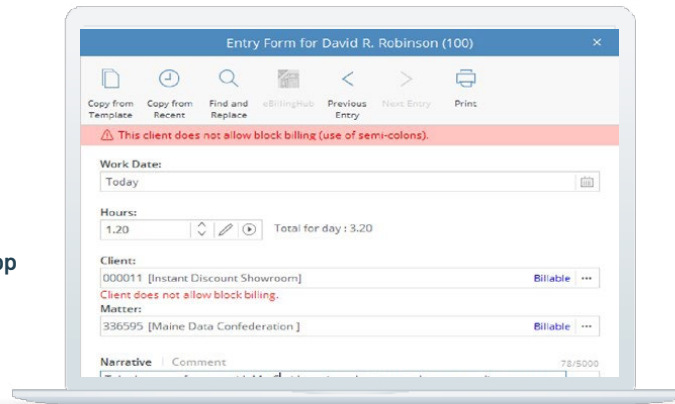


Reduce risk and enhance client satisfaction

1 When a lawyer creates a time entry for a client or matter for the first time, Intapp automatically notifies that lawyer of all billing guidelines related to that client



2 Intapp enables firms to surface billing terms at the point of time entry to proactively enforce compliance. This capability is supported natively in Intapp Time



Business problem

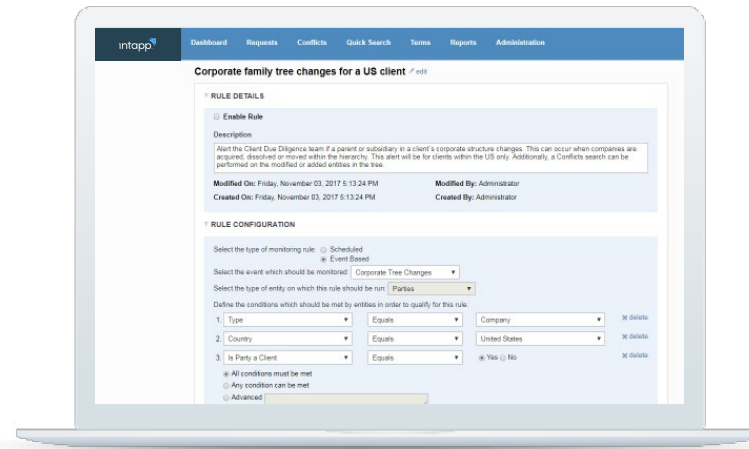
- Inability to effectively expose and enforce client terms of business results in write-offs and unsatisfied clients
- Firms lack a means to proactively detect changes to client conditions that could impact risk, such as changes to corporate structure, downgraded financial ratings, or negative news
- Firms struggle to comprehensively enforce client and regulatory confidentiality requirements across all systems where sensitive information resides and as matter teams change

How Intapp helps

- Intapp exposes client terms of business through reports and notifications, and integrates with firm systems to proactively enforce client obligations
- Intapp continuously monitors changing client conditions and takes action when required, offering out-of-the-box monitoring templates and enabling firms to define custom rules for high risk matter types
- Intapp automates the creation of ethical walls across any system, and automatically manages permissions as matter teams change

Results

3 Define monitoring rules to detect and respond to changes to client conditions



- Reduce write-offs by improving visibility of client terms of business and enforcing those terms before sending a bill to a client
- Resolve potential ethical or financial risk issues that arise over the course of an engagement
- Protect your firm and your clients from embarrassing and costly data breaches with the most powerful ethical wall technology on the market

4 Manage access controls over the life of a matter to ensure compliance with client confidentiality requirements

