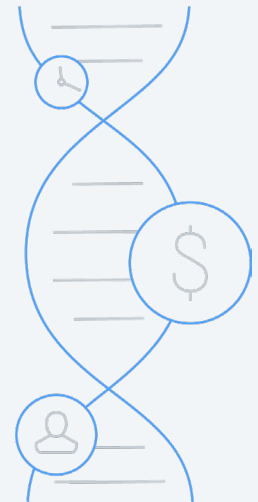


Empowering your strategies with predictive intelligence

Professional services firms today are awash in data. They regularly capture and store critical information about timekeeping, billing, conflicts checks and due diligence, client outcomes, and more – yet continue to struggle with surfacing meaning, patterns, and actionable insights from data that’s often stored in disparate system. That’s where the right technology can help.

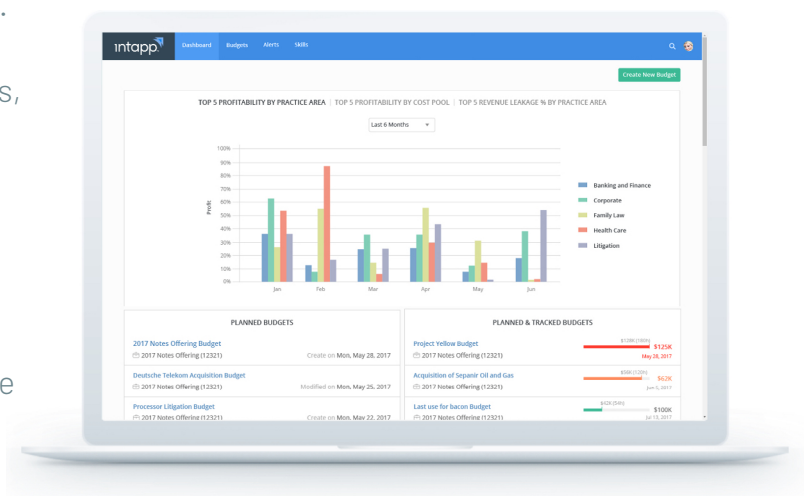


Cohesive data offers AI opportunities

Capturing disparate data and combining it into a single, meaningful treasure trove is a challenge. That’s why Intapp products and solutions are characterized by their interoperability – both among themselves and in relation to third-party software – which is made possible by the Intapp Tech Foundation. Data captured across the client lifecycle, interwoven with data from third-party sources, is merged into a single, rich repository of insights within the Tech Foundation data warehouse.

That unified data can then be leveraged by Intapp’s AI to enable data-derived analysis, automation, and predictive intelligence. These AI capabilities – another example of

integral Tech Foundation services – fuel the experiences across various Intapp solutions to power the firm’s business processes and achieve desired outcomes with an unprecedented level of accuracy.





Introducing Engagement DNA™

One facet of the proprietary Intapp AI is Engagement DNA™, a technology that automatically sifts, sorts, and categorizes a firm's previous engagements by their shared characteristics. By identifying "families" of engagements, Engagement DNA focuses on highly relevant data sets to provide predictive intelligence based on historical data regarding time, billing, budgets, conflicts, and performance.

Engagement DNA employs a range of processes to manage, analyze, and assess data.

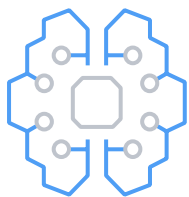
Data cleansing



Data cleansing refers to the actions of structuring, organizing, categorizing, and tagging data so it becomes relevant and useful for large-scale analysis. Once data is appropriately cleansed, it provides relevant and accurate input from which firms can analyze information, make estimates, and even take specific actions – for example, changing resourcing to preserve profit margins as a matter proceeds.

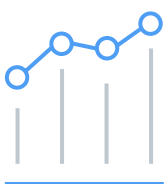
Machine learning and proprietary algorithms can now glean added value from the data by analyzing patterns and identifying inaccuracies and irregularities. They can even predict correct values and fill in gaps, as well as identify a matter cadence and speed to amplify the data.

Natural language processing (NLP)



NLP, a branch of AI, focuses on helping computers process, understand, and analyze large amounts of human language (or "natural language") data. Engagement DNA applies NLP against a firm's data, then works to extract meaningful insight from narratives, timecards, and other lawyer-generated notes. By leveraging this data analysis, firms can begin to automatically identify a matter's phases and tasks to arrive at a deeper understanding of the nature of the work beyond simply the billed hours. Adding this level of detail enhances the data set to offer a more robust understanding of the nuances that not only make matters different but also similar.

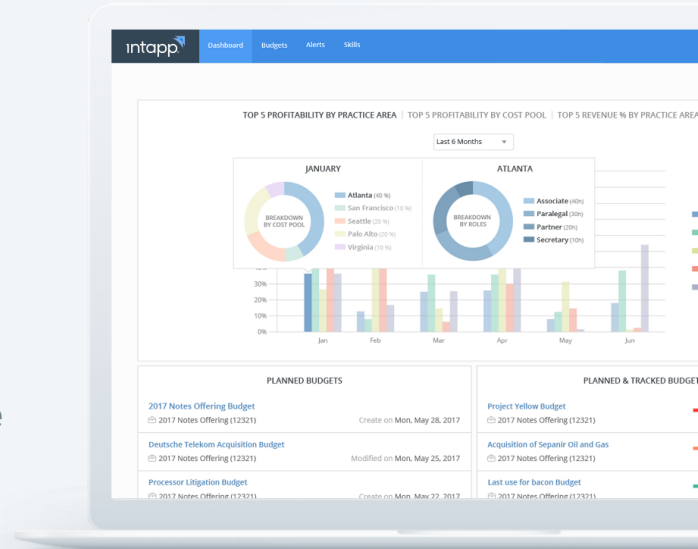
Predictive analytics (PA)



PA applies clustering algorithms, predictive modeling, advanced statistical analysis, and other techniques to identify patterns in historical data, then forecast likely future outcomes. Once a firm's data is cleansed and additional data is derived, cluster analysis brings similar matters together. Pooling a relevant sample of similar matters enables not only an understanding of their congruities, but also an opportunity to define their subtle disparities. Advanced statistical analysis can then easily leverage the clusters to quickly produce accurate budgets based on these similar groupings.

Use case: Improving scoping and pricing strategies

Engagement DNA provides a powerful boost to Intapp's technology, software, and solutions. For example, Intapp Pricing employs intelligence surfaced by Engagement DNA to help firms solve immediate challenges, such as deriving pricing strategies, scoping and resourcing engagements, and employing dynamic modeling to explore profitability scenarios such as assessing accurate resourcing to optimize pricing and planning strategies.



Scoping and pricing



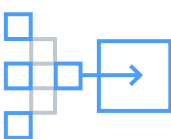
Firms can use Intapp Pricing to support optimized scoping for new matters and provide pricing that enables both profitable execution and greater client satisfaction. Engagement DNA helps by tracking how similar matters were staffed, what tasks were involved, and how other relevant details came into play. These capabilities, which are foundational to Intapp Pricing, enable teams across the firm to quickly and consistently price matters while tracking to budget.

Resourcing



Information derived from Engagement DNA can be used to determine ideal staffing for a matter, including the number of lawyers performing work, and the leverage – that is, the ratio of senior partners, partners, and associates. Analysis of past engagements and profit margins associated with various leverage patterns offers firms the opportunity to resource matters that will track to ideal profitability targets while meeting client expectations and providing the best possible service. Further, firms can now assess the optimal distribution of work across resources with an accurate representation of effort.

Process, planning, and monitoring



By using Engagement DNA, Intapp Pricing allows firms to develop scalable, repeatable, system-driven processes to price matters. Firms also gain visibility into the matter-delivery lifecycle from both a financial and project perspective – including budget-to-actuals, tasks, and milestones – and can employ dynamic modeling to manage real-time adjustments that ensure profitability. Event-based alerts offer actionable intelligence, enabling firms to make course corrections to keep engagements on track and clients informed.

The future of Engagement DNA

Other potential use cases made possible by Engagement DNA may include predicting time narratives and enabling loss-leader analysis. Predicting time narratives could allow the system to automatically enter time-narrative information for a matter based on analysis of similar previous engagements. Autogenerated time narratives could help firms analyze client profitability holistically, allowing them to provide services more selectively, focus business development efforts on high-value clients, and determine which high-profitability matters could offset losses.

