



Intapp  
@ ILTACON



Welcome back to ILTACON! Our team is excited to connect with you this week. We have much to celebrate and even more to share with you. As Intapp continues to grow, we continue to make significant investments in enhancing our solutions, building new software that extends our client success platform vision, and expanding the service and support available to our customers.

It's no secret that the industry faces new demands. Clients are asking for more from their law firms. And they aren't shy about changing firms that aren't delivering — often without notice. To remain competitive, firms must not only offer exceptional service, they also must demonstrate true industry expertise, delivered in close partnership with their clients.

To win today, firms must provide a superior experience and deliver successful outcomes — clients need to feel like they can trust their firms to understand them, to be their true ally, and to work transparently and efficiently. (These are the same principles we strive to apply in our own customer partnerships.)

At Intapp, our vision is to transform and enhance your firm's ability to meet these challenges, with innovative, integrated software solutions that help you:

- Develop and win more business
- Scope and price matters
- Document client requirements and expected outcomes
- Clear conflicts and address compliance requirements (including AML)
- Enhance matter team execution and efficiency
- Deliver expected outcomes and more closely collaborate with clients
- Monitor financial performance and manage risk throughout the lifecycle

There's tremendous opportunity for IT, risk, finance, business development, marketing and other operational leaders to play a critical role in the equation.

To support you, Intapp builds on an unmatched record of bringing meaningful innovation to existing software categories, establishing entirely new categories, and applying cutting-edge technologies — all specifically designed to work in real-world law firm environments

And, as you'll see this week, we're at it again.

I hope you'll take a moment to read about our latest developments and connect with us here at ILTACON.

A handwritten signature in blue ink, reading "Don Coleman".

Don Coleman  
Chief Operating Officer

# Thirteenth Annual ILTA Wine Tasting Reception



Enjoy fine wine, among the finest company.

Wednesday at 5 pm.    By Invitation Only.    RSVP Required.



# intapp<sup>TM</sup>

## ILTACON Highlights

Innovation

Pricing  
Business Acceptance

Insight

Experience  
Management

Intelligence

AI-infused  
Solutions

Inception

Dream Again  
(October 7-10, 2018)



# ILTACON Forecast:



## Continued Clouds...

Intapp continues to set new standards for innovation and quality across multiple software categories, both on premises and in the cloud.

As a software delivery model, the cloud offers real and significant advantages to IT and business users alike — including smoother upgrades, faster innovation, easier integration, and seriously strong security.

Last year, we're introduced cloud versions of [Intapp Open](#) (for intake, conflicts, terms of business, and experience management) and [Intapp Time](#).

These solutions offer what you'd expect from modern cloud solutions, like: strong security, high performance, uptime monitoring, disaster recovery, and more.

This year we've added [Intapp Flow](#) and [Integrate](#) to the mix, and achieved ISO 27001 certification for our cloud solution portfolio (including validating compliance with cloud-specific information security controls ISO 27017 and ISO 27018).

Whether you see clouds on your immediate horizon, or prefer to stay put on premises just a little while longer, Intapp continues to offer software, service and support designed to help you and your firm reach new heights.



...with heavy  
Security



# The Firm of the Future

# Is Intelligent

For nearly two decades, Intapp has enabled law firms to manage their business more effectively, to address client requirements more consistently, and to enhance the ways they work in response to critical trends impacting a highly competitive market.

Offering a unique solution set and acting as a trusted advisor, Intapp has seen significant adoption and success — growing to serve over 700 customers, including some of the largest and most accomplished firms in the world.

Our growth has been achieved because of a commitment to continuous investment in innovation and customer success.

And now, we're taking this commitment to the next level — enabling the next phase in the evolution of the professional services industry — the intelligent firm.

Intapp is focusing the industry's most accomplished cognitive computing experts on leveraging the most sophisticated artificial intelligence technologies to build and extend the most advanced industry-specific AI software solutions on the market.

And this innovation is already here. Today, advanced Natural Language Processing and Machine Learning capabilities have been integrated into our existing software (with completely new and exciting solutions in the works).

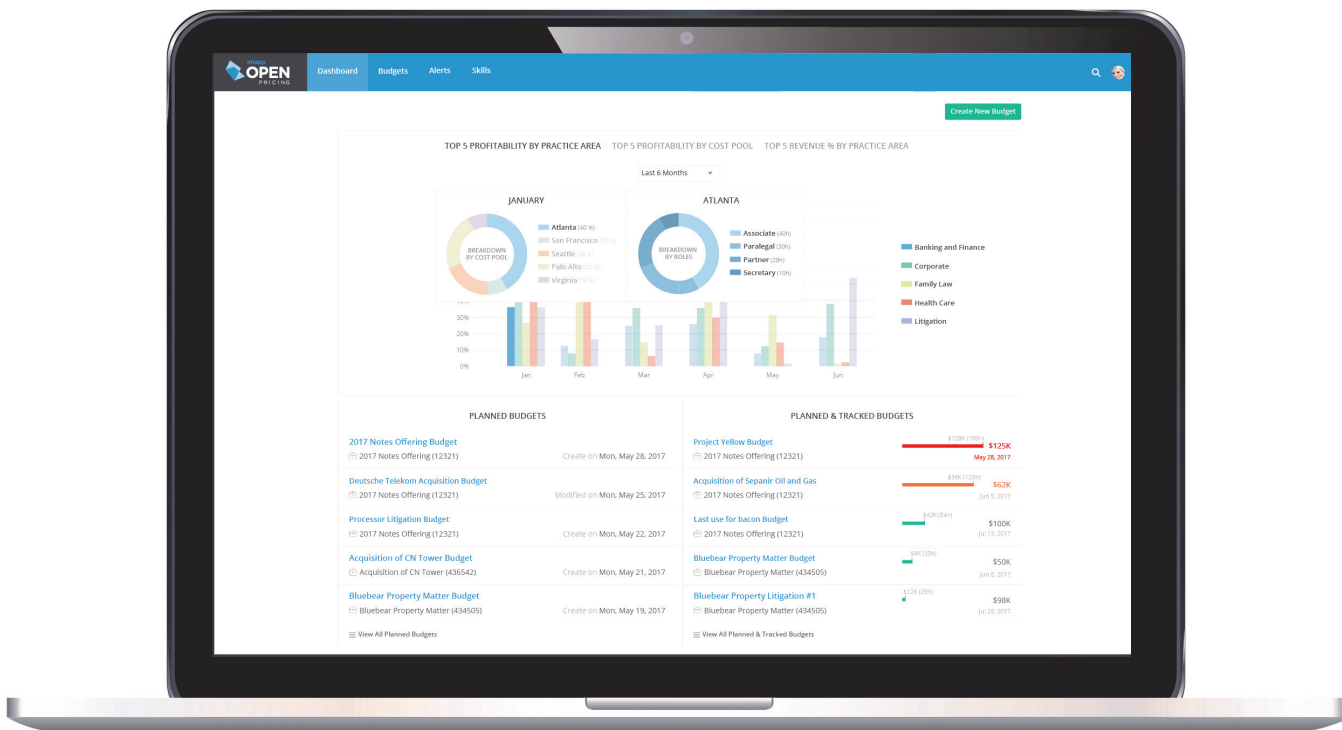
All of these efforts enable firms to achieve even greater visibility, insight, control and profitability. Because Intapp addresses the entire client lifecycle from business development to service delivery — maximizing client and firm success alike.

**Intapp's unique AI vision is unlocking unique potential — the power of the intelligent firm.**



# It's Coming...

# Intapp Open Pricing



Today, clients are putting increasing pressure on firms to clearly and consistently scope, price and resource matters at the point of new business inception.

In response, as firms invest in new staffing to address these complex problems, they're also clamoring for fresh innovation to enhance the practice of pricing and give them a powerful competitive edge in the market.

Which is why so many firms have been *shouting*: "Hey, Intapp! When are you going to do for pricing what you've done for so many other industry categories\*?"

Well, we heard you. And built something special.

(Because existing tools, that don't work in real-world environments, from small vendors lacking resources to implement and support your success, won't cut it.)

Whether you're a pricing manager, financial manager, legal practitioner, business developer, or the IT expert chartered to support all of the above — [Intapp Open Pricing](#) brings practical innovation that will make you and your firm shine, including:

- Budget building wizards, that make the process easy for lawyers and pricing professionals alike
- Budget modeling tools, that make it easy to build and evaluate different profitability and delivery scenarios
- Budget tracking and monitoring, via native time entry integration, for real-time critical threshold alerts

Delight clients. Increase profits. Reduce write-downs.

[Contact your Intapp account manager to learn more.](#)







intapp

**INCEP**

**DREAM**





# **CEPTION 18** **AGAIN**

San Francisco | Oct 7 — 10

[inception18.com](http://inception18.com)

# Win More Business

## (Experience Matters)



Delivering true client success requires understanding each client's "big picture" objectives, and mobilizing your firm's unique experience to provide service and results that meet and exceed them.

Today, any firm looking to deepen client relationships and consistently win new business must be able to demonstrate its unique skill and value proposition quickly. [Intapp can help — on all fronts.](#)

It's no secret that there are a few legacy experience management tools on the market. Your firm may even own one... but is it working?

Legacy tools that rely on manual data entry, collect incomplete, poorly-structured information, and deliver a fire hose of raw search results (including that one lawyer who billed an hour to a complex matter, who is now an "expert") aren't up to the challenge.

What's needed is a fresh approach: built specifically for real-world environments; that delivers automated, integrated data management, intelligent metrics, filtering and ranking; that's from a vendor with an ambitious vision, and proven track record of delivering fresh innovation — so your firm can win more business.

[Contact your Intapp account manager to learn more.](#)

# It's time for: Modern Time Management



Intapp's time recording software has evolved over the years to become the industry's most advanced, with proven popularity illustrated by its 200,000 users across more than 400 firms.

The latest iteration represents the ultimate alignment of our software with today's progressive thinking around timekeeping — and the biggest shift in how time is viewed and valued by today's law firms.

Together, we are moving beyond the traditional relationship between time and billing, encouraging firms to extract greater business value from their time data and helping them gauge the true costs of service delivery — an approach we call Total Time Management.

Today, firms are increasingly looking to update legacy time entry software (often as part of broader initiatives to upgrade or migrate practice management systems).

For example, your firm may be looking to move away from discrete components (entry, capture, desktop and mobile) to embrace a unified solution.

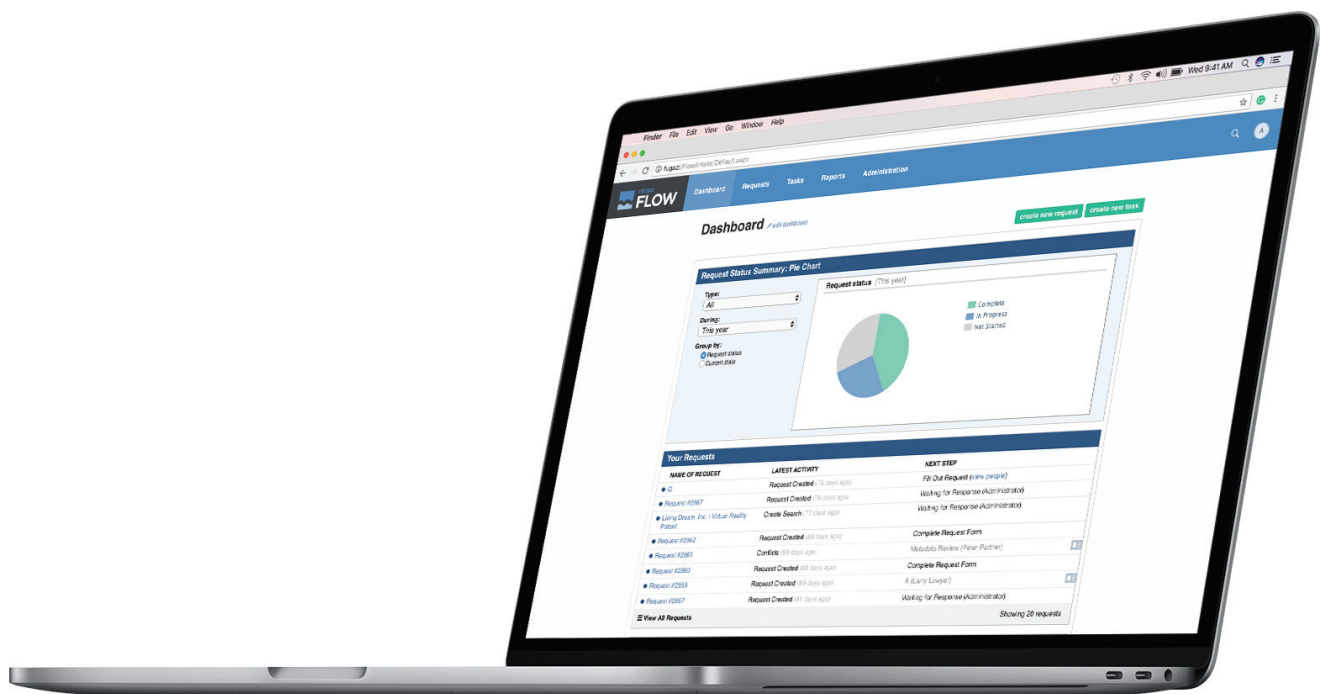
Or, you may prefer a phased approach to modernization, and upgrade individual components in stages.

Regardless of your chosen approach, Intapp is ready to help you enhance time management at your firm.

[Contact your Intapp account manager to learn more.](#)



# The Future of Legal Practice Automation



Legacy approaches to business process management and LPA are slow, expensive, error-prone, and hard to maintain over time. [Intapp offers a better way.](#)

Chosen by firms ranging in size from 45 to over 4300 lawyers, Intapp Flow offers a fresh approach to workflow and legal practice automation. (And an interface designed for actual human beings to use and enjoy.)

With advanced data and task management capabilities, templates built specifically for law firm environments, and a marketplace connecting firms with over 80 solutions offered by our partner network, Intapp delivers workflow that really works (in minutes, not months) and legal practice automation (that's actually practical).

[Learn more: intapp.com/flow](https://intapp.com/flow)

# INTAPP MARKETPLACE

The Intapp Marketplace opens new opportunities for our customers to get even more out of Intapp Flow by taking advantage of the skill and expertise of our growing partner network.

Now firms can adopt a single platform for workflow, business process, and legal practice automation — instead of pursuing an assortment of point-solutions, custom development, and one-off tools.

Showcasing over 80 solutions across a broad range of categories and topics, the Marketplace offers firms new ways to improve internal efficiency, lawyer productivity and overall client service.

**Featuring Solutions From:** Aurora North, Askew Network Solutions, Feynbrook, HBR Consulting, Hyperion, InOutsource, Pinnacle, Stickleback, and Wilson Legal

[intapp.com/marketplace](https://intapp.com/marketplace)



IP PRACTICE  
AUTOMATION



MATTER  
MANAGEMENT



MARKETING &  
BUSINESS DEV



PROFESSIONAL  
COMPLIANCE



KNOWLEDGE  
MANAGEMENT



DMS / WORKSPACE  
MANAGEMENT



FINANCE



EMAIL



DOCUMENT  
SERVICE CENTER



ADMINISTRATIVE  
REQUESTS



RECORDS  
MANAGEMENT



SOFTWARE  
APP-SPECIFIC



IT / STAFF REQUESTS



TRANSPORTATION



VENDOR MANAGEMENT



RISK MANAGEMENT



HUMAN RESOURCES

(AND MORE COMING...)





## Experience Management: Win More Business

Any firm looking to deepen client relationships, win new business, and cross sell effectively must be able to quickly demonstrate its unique skill and value proposition.

Approaches that rely on manual data entry collect incomplete, poorly structured information and deliver a fire hose of raw search results that aren't up to today's challenge. Intapp has developed a fresh approach — one that's built specifically to address real-world environments; one that delivers automated, integrated data management, intelligent metrics, filtering and ranking — from a vendor you know and trust. [Attend the session to experience the future of experience management.](#)



**Monday, August 14**

1:00pm — 2:00pm

(Room: Oceanside Ballroom B )

**Wednesday, August 16**

8:00am — 9:00am

(Room: Surf F)

## Business Acceptance: Introducing Intapp Open 4.0

Intapp Open is the clear industry standard for business acceptance. And now it offers new business management capabilities that help firms actively monitor their client relationships and take immediate action in response to negative events or developments. With this latest release, Intapp Open enables firms to improve profitability and protect revenue across the full client lifecycle.

Attend this session to learn more about the new monitoring and alerting capabilities, as well as other exciting new features such as improved conflicts reports, personalization options, and engagement letter document assembly.



**Tuesday, August 15**

8:00am — 9:00am

(Room: Surf F)



## AI + Terms of Business: It's Real

A lot of vendors are spending a lot of energy and ink these days talking about Artificial Intelligence. But is it “real” or just another popular buzzword?

Well, at Intapp we’re making significant investments in applying cutting-edge technology — including AI — to address real-world problems facing law firms.

Attend this session to learn more, and see how the infusion of human-assisted AI machine learning capabilities enables firms to automate and streamline categorization, negotiation, management, analysis and compliance with client outside counsel guidelines and terms of business.



**Tuesday, August 15**

10:00am — 11:00am

(Room: Surf F)

**Thursday, August 17**

8:00am — 9:00am

(Room: Surf F)

## Time is on Your Side: (Intapp Time)

We introduced Intapp Time with a unique vision for “Total Time Management” comprising time entry, automated activity capture, mobility, analytic insights and compliance. In this session, we’ll explore how to get the most out of the complete Intapp Time suite. Whether your firm is:

- an existing Intapp Time customer looking to get more out of your investment
- running on legacy software (including Time Builder or DTE) and looking to upgrade
- or planning a PMS update and looking to provide lawyers with a better time management experience before the back end accounting systems change

you’ll leave this session with a new perspective on time.



**Wednesday, August 16**

2:30pm — 3:30pm

(Room: Surf F)

**Thursday, August 17**

10:00am — 11:00am

(Room: Surf F)



## Client Collaboration: Unlocking the Flow Advantage

Collaboration is good. When it comes to law firms and their clients, those that work closely together achieve clear and mutual benefits, including greater efficiency, visibility, clarity and end-of-day results. But there are real impediments to effective collaboration, and too often technology is a barrier instead of benefactor.

But not with Intapp. Attend this session to discover new possibilities for firm-client collaboration on matter execution with Intapp Flow.

With the accessibility (and security) of the cloud, sophisticated but straightforward task management, and new native document assembly capabilities, Intapp Flow opens new opportunities for client collaboration and success.



Tuesday, August 15  
2:30pm — 3:30pm  
(Room: Surf F)

## Don't Hesitate, Team Integrate: Why Flow is For You

The saying goes: "If you build a better mousetrap, the world will beat a path to your door." That certainly holds true for workflow. For years, Intapp Integrate users have clamored for the natural counterpart to the "magic box" for data integration — the ability to create and manage the form and process side of automating work.

A few years ago, we delivered — with a fresh approach to workflow designed specifically for this community.

Since then, many have pursued and achieved moments of IT Nirvana, combining the power of Intapp Flow and Intapp Integrate.

Come — see what you're missing, and why you should join your peers on this path to process perfection and End-to-End Automation.



Wednesday, August 16  
10:00am — 11:00am  
(Room: Surf F)

# It's Here: Intapp Open 4.0



(And It's Amazing)

With an unmatched record of adoption and real-world success, Intapp Open has become the acknowledged industry standard for business acceptance.

Now, **Intapp Open 4.0** takes things to the next level.

This major update adds advanced active engagement monitoring capabilities. These enable firms to improve profitability and protect revenue through integrated, event-driven alerts tied to the entire matter lifecycle.

It also offers advanced AI-powered terms of business management, enabling firms to automate and streamline categorization, negotiation, management, analysis and compliance with client outside counsel guidelines.

And it brings great usability enhancements, including brand new interactive conflicts reporting that simplifies matter evaluation and review. And a fresh UI that makes it even easier to manage the entire lifecycle.

Whether as part of a strategic push to improve client analysis and firm profitability, a program to reduce risk, or an initiative to speed matter opening and improve lawyer productivity (and satisfaction), Intapp Open has something to offer every firm. **Including yours.**

**Learn more: [intapp.com/Open](https://intapp.com/Open)**

# intapp™



"We always recognized Intapp as a leader in the industry from both an innovation perspective and equality perspective. All the products that we've ever purchased from Intapp and implemented have been very, very good. I think if you're going to work with Intapp, it's important to look at the full suite of products that they have. They've really spent a lot of time studying the industry and determining the suite of applications that help us run the business from various aspects.

"If you really look at how it's all stitched together, it can really be a compelling story from many facets to help you run the business, just to provide compliance, to open new matters, to managing time. It's really a well-thought-out strategy for the industry. Intapp is one of those companies that I think is easy to do business with."

— Andy Jurczyk, Chief Information Officer, Seyfarth Shaw



"We recently went live with [Intapp Open](#). We started this project because we had a product that was basically at end of life. Run by a very small company, it was hard to get enhancements. It really wasn't state of the art and we felt given, obviously, the growth of business and the importance of conflicts, that we needed to get a better system in. It was also a very cumbersome process. It took quite a while to get, from the lawyers perspective, to get matters opened and we really needed to totally streamline and redefine the process around opening matters.

"In thinking about Intapp compared to other vendors — the reason we like working with them is that they are integrated into the risk industry in the legal community. They hold their Risk Roundtables. They drive discussion on a lot of the issues, which we find that very helpful because not only does it get us thinking, but it also gives us a forum to be discussing those issues with our peers."

— Mara Nickerson, Chief Knowledge Officer, Osler



"As we've dealt with Intapp as a company over time, it's always been one pleasant surprise after another. With [Intapp Time](#), we've gotten great feedback from our lawyers. Prior to this, they did not have the use of timers, and I would say half of them are now fully embracing timers, which makes their time that much more accurate, and much easier for them to keep track of. As a firm, Intapp Time was a major success. We then went to [Intapp Walls](#), because we had such great success with Intapp Time."

— Mark Stanley, Chief Information Officer, Beveridge & Diamond



# Insights



"I'm really proud that here at Zelle we provide our attorneys with a top-notch user experience. The type of litigation that we do puts us in competition with some of the largest firms in the world, and we have to give them the same toolset. And we have to deliver it in a fashion that is always available and always performing. When we've had other attorneys join from some of these bigger firms, they're always very pleasantly surprised at how well we can deliver those applications to them.

"When Zelle decided to start moving applications to the cloud including [Intapp Open](#), there was hesitation and some uncertainty as it relates to security. Security is a huge factor of consideration for us here at the firm – making sure that our data and our clients' data is as secure as it is possible.

"And once we started digging in to the security around Intapp and the ability to have it tie in to our multifactor authentication and provide a seamless way to log in from inside our walls, we realized that not only as easy as having it on premises, but it was also more secure than what we can do, without having a budget that would be far too cost-prohibitive.

"My experience with the Intapp team has been wonderful. The responsiveness of everyone involved in the project has been great. I feel like I have access the people than I need at any time, and any question I have ever had has been resolved, answered and taken care of in a very timely fashion."

— Bryce Husted, Director of Information Technology, Zelle



"We were on a very old version of LegalKEY. We went through the process of a formal RFP, both for our conflicts system, as well as our new business intake system. What we found with [Intapp Open](#) was that it would provide us with a framework to be able to maintain the system ourselves. S

"So instead of waiting for a developer to write a report that was part of the executable, now we had the power to create the reports ourselves. If we needed to make modifications to forms or even the workflow, we now had the power to do that ourselves. It was a logical choice for us. In addition to the conflicts system, there were a lot of features that we could take advantage of, such as the Dun & Bradstreet integration, Hoovers integration, that lead us to purchase the solution. And we've been very happy with it.

— Lisa Mayo, Director of Data Management, Ballard Spahr



"Intapp as a company — as a culture maybe is the better word — has some of the most pleasant people I have ever had the pleasure of working with. They're kind, they're patient, they're thorough. At this point, I know many of them on a first name basis. Many of my relationships with many of the employees go back many years. As a company, I really enjoy doing business with Intapp, and I wouldn't hesitate to do it again.."

— Mark Manoukian, IT Director, Kegler Brown

# Thirteenth Annual ILTA Wine Tasting Reception



Enjoy fine wine, among the finest company.

Wednesday at 5 pm.    By Invitation Only.    RSVP Required.

