

Intapp Connect *Virtual Summit*

Opening Keynote

PRESENTED BY

JOHN HALL

Chief Executive Officer

PRESENTED BY

THAD JAMPOL

Co-Founder and
Chief Product Officer

Welcome

JOHN HALL

The background of the entire image is a photograph of a person walking away from the camera on a narrow suspension bridge. The bridge has a wooden plank deck and is flanked by dark, woven mesh railings. The bridge spans a deep, lush green forest. The lighting is soft, suggesting an overcast day or a shaded forest environment.

“ In the middle of every difficulty lies opportunity.

ALBERT EINSTEIN

Thanking you
on our 20th anniversary



An Incredible Industry

The center of the global economy



We're focused uniquely on your industry



The Five Waves of COVID-19 for Professional Services Firms



The frontier of a new era

Pre-2007

The Traditional Firm

2008

The Efficient Firm

2020 and Beyond

?

The Potential of the Firm



The Connected Firm



Ushering in the Era of the Connected Firm

Pre-2007

The Traditional Firm

2008

The Efficient Firm

2020 and Beyond

The Connected Firm

Becoming the Connected Firm

It's connected

- Data
- Processes and operations
- Teams and people
- Technology
- Experience

Fueled by intelligence
and purpose-built for you



Your Role in Bringing the Connected Firm to Life



The Connected Firm Results



Growth



Profitability



Risk
Management

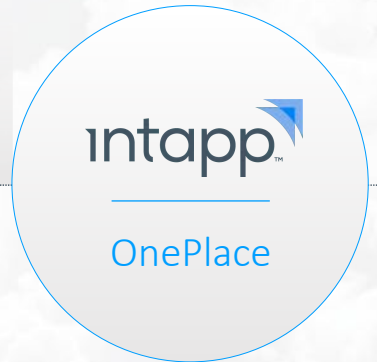
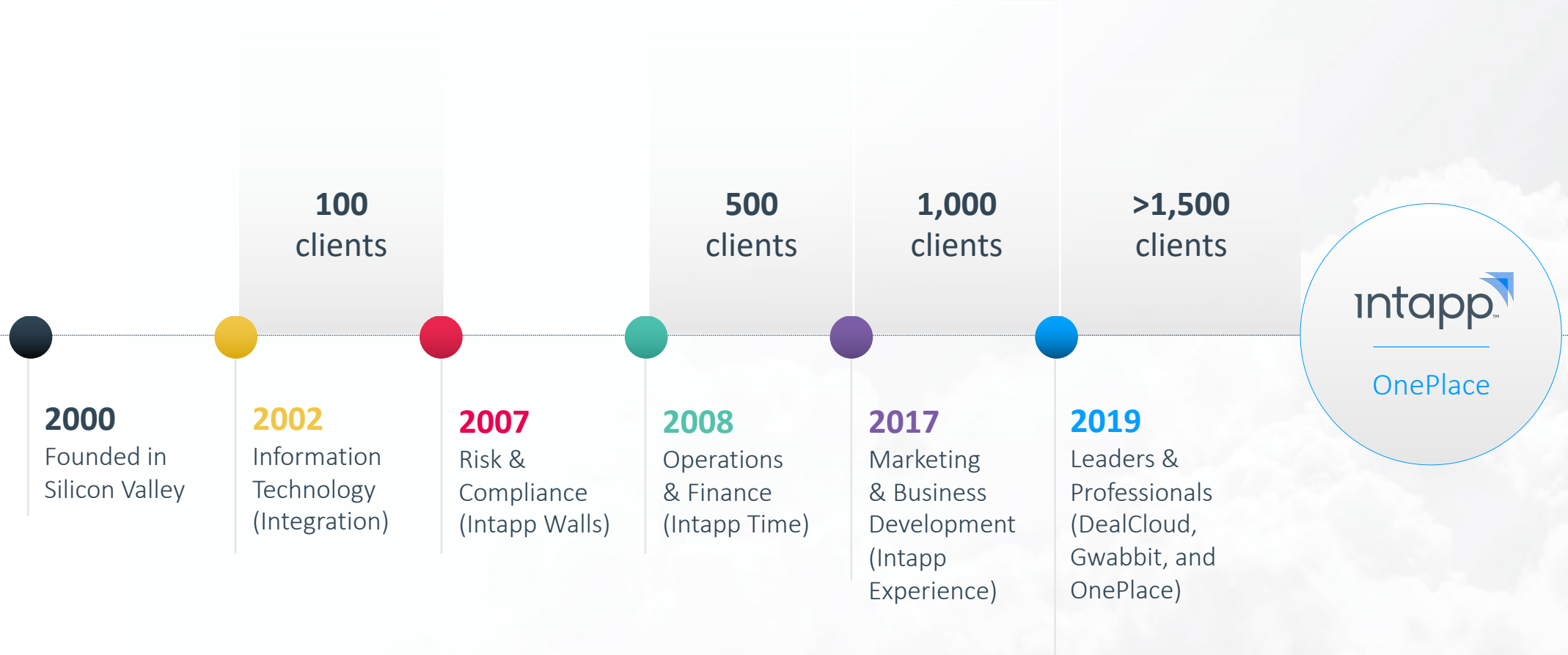


Leaders and
Professionals
Experience



Client
Satisfaction

Building the Connected Platform



OnePlace for Your Connected Firm

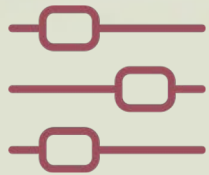
THAD JAMPOL

-
- Holistic digital strategy
 - Unified front office
 - End-to-end experience



Your Tech has been an Obstacle

**Forced-fit generic
CRM and ERP**



Silos of point tools

The Power of the
Connected Platform
to Deliver the Promise
of the Connected Firm

OnePlace

Meet Intapp OnePlace

- Application Integration
- Data and Content Integration
- Workflow Management
- Document Assembly

- Scoping and Pricing
- Budgeting and Monitoring
- Time Capture and Entry
- Billing Compliance



- Practice and Sector 360-Degree Intelligence
- Key Client Management
- Strategy and Planning
- Unified Lifecycle

- Relationship Intelligence
- Campaigns and Events
- Experience and Expertise
- Key Client Programs

- New Business Intake
- Conflicts
- Terms of Business
- Ethical Walls



Connected platforms are set to change the ways that professional services firms conduct business.

Firms have gained an overwhelming preference for integrated suites of applications, reducing silos and working to bring individuals, departments, and processes together.

ZACHARY RABEL
SENIOR RESEARCH ANALYST
SAAS AND INDUSTRY CLOUD

What is Connected?

It's connected

- Data
- Processes and operations
- Teams and people
- Technology
- Experience

Fueled by intelligence
and purpose-built for you



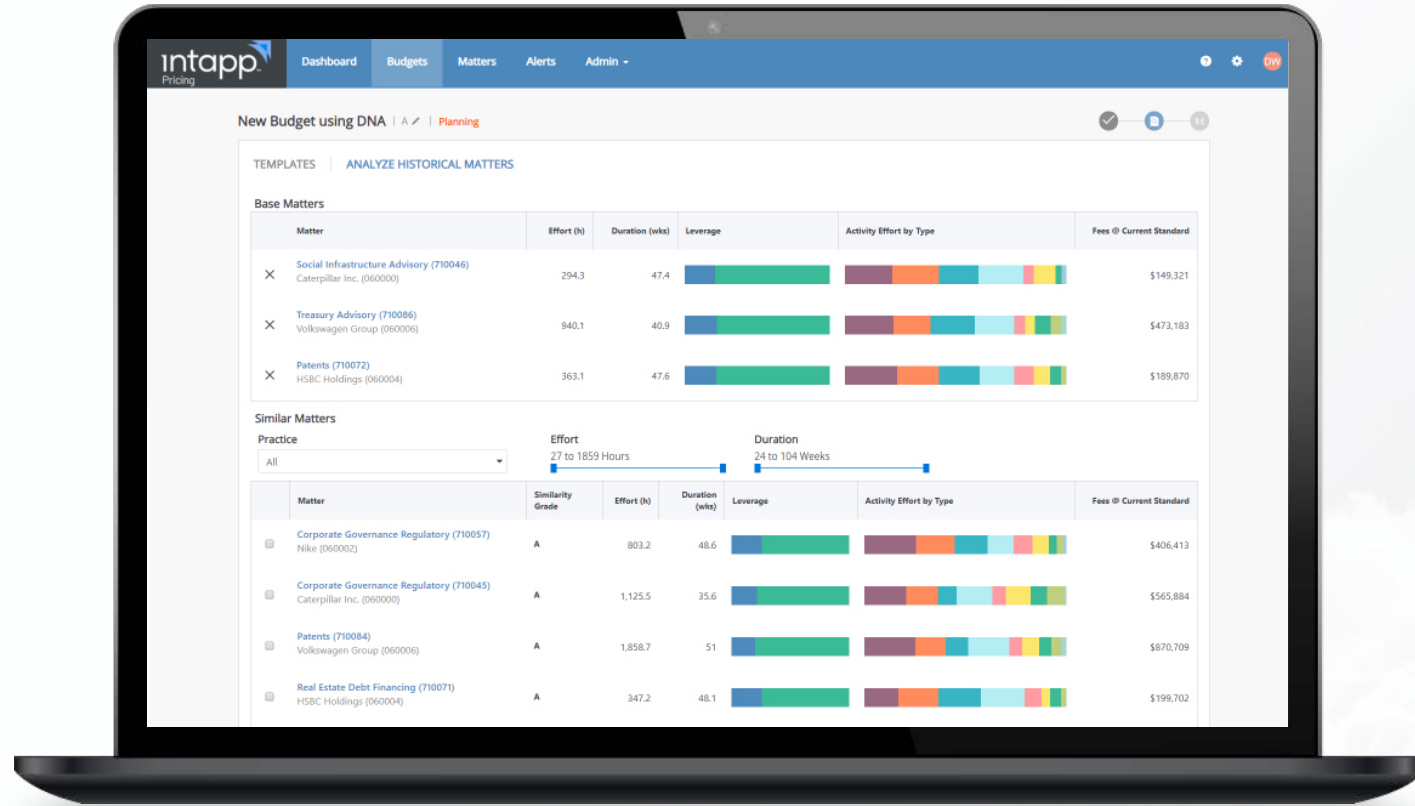
It's Connected... Data



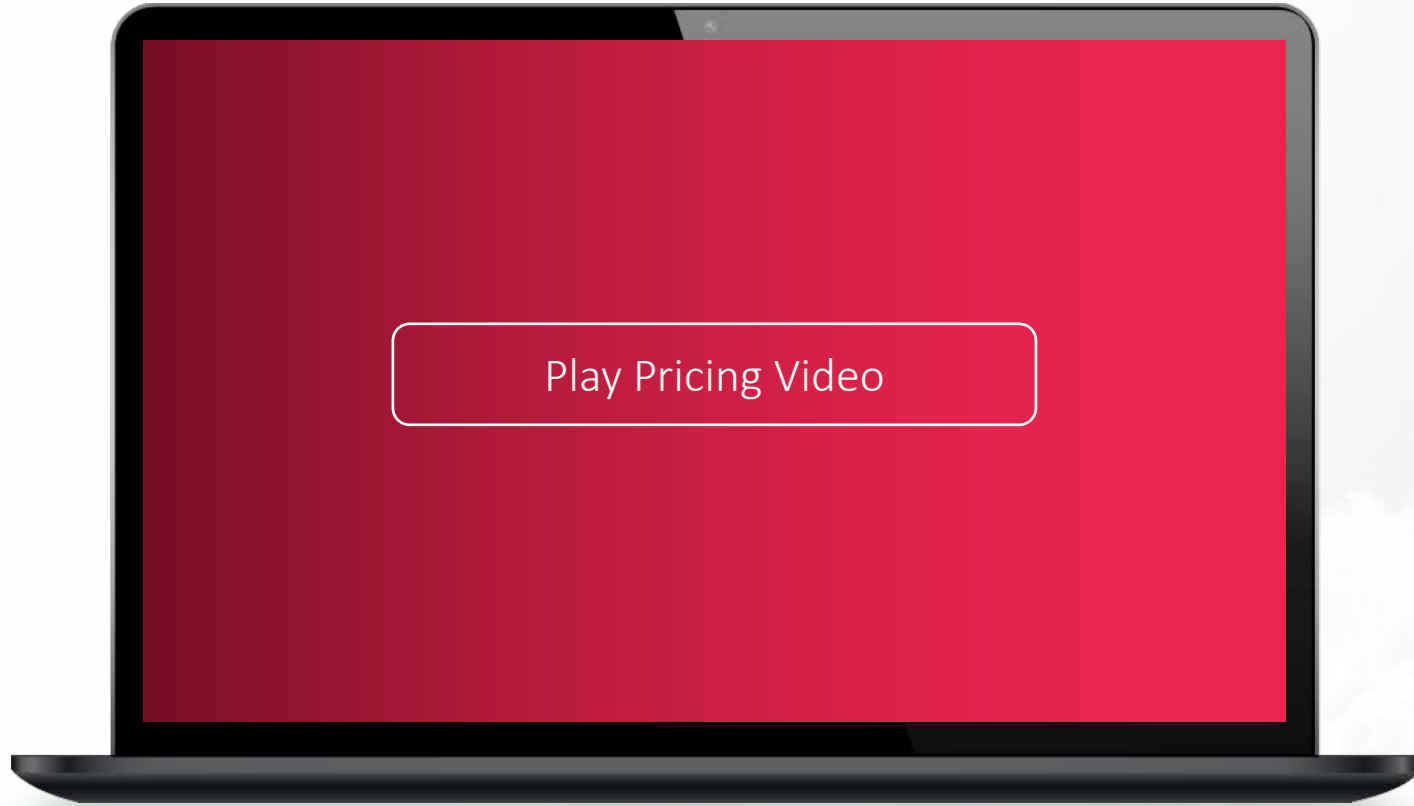


Baker McKenzie.

Jason Marty
Chief Operating Officer



Engagement DNA™ – Available Now



Play Pricing Video

It's Connected... Processes and Operations

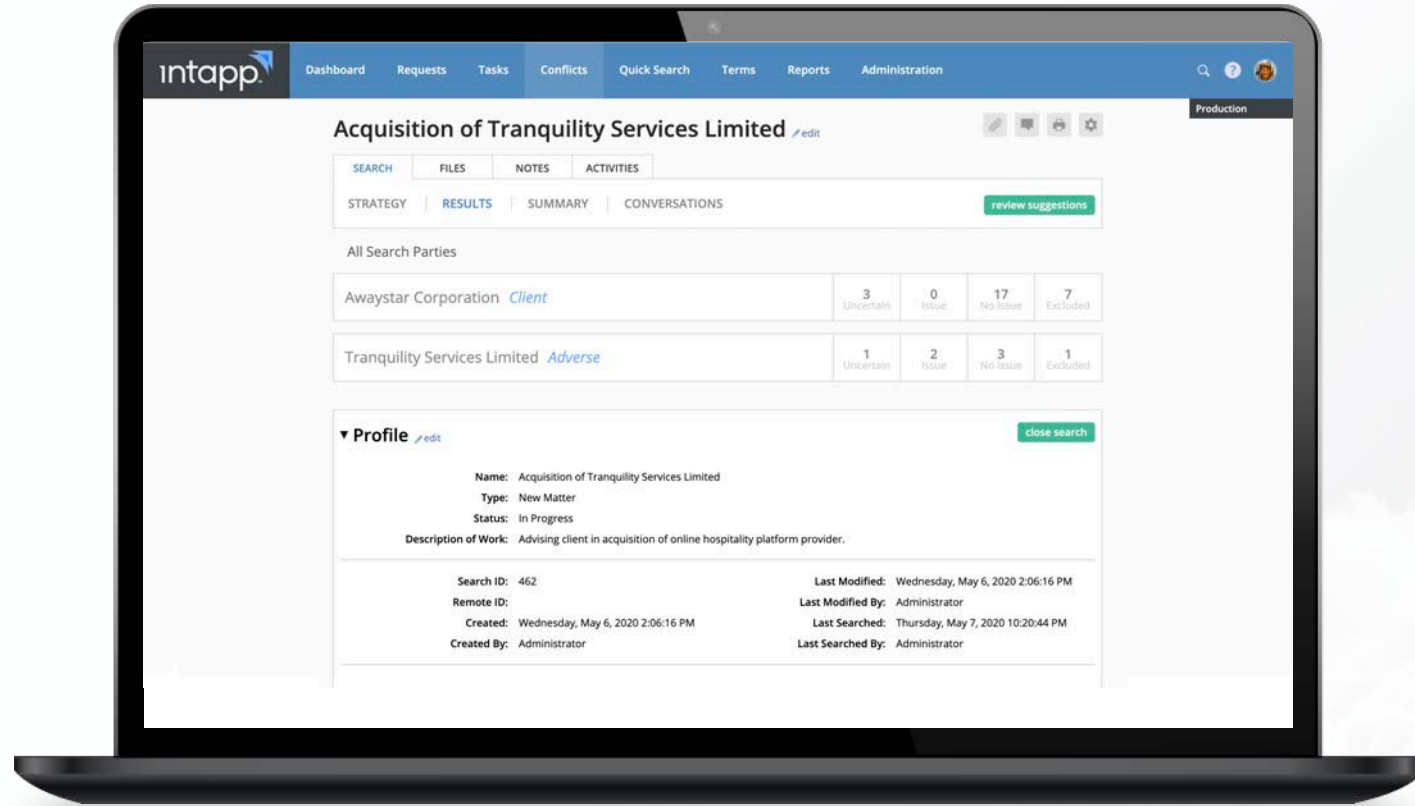




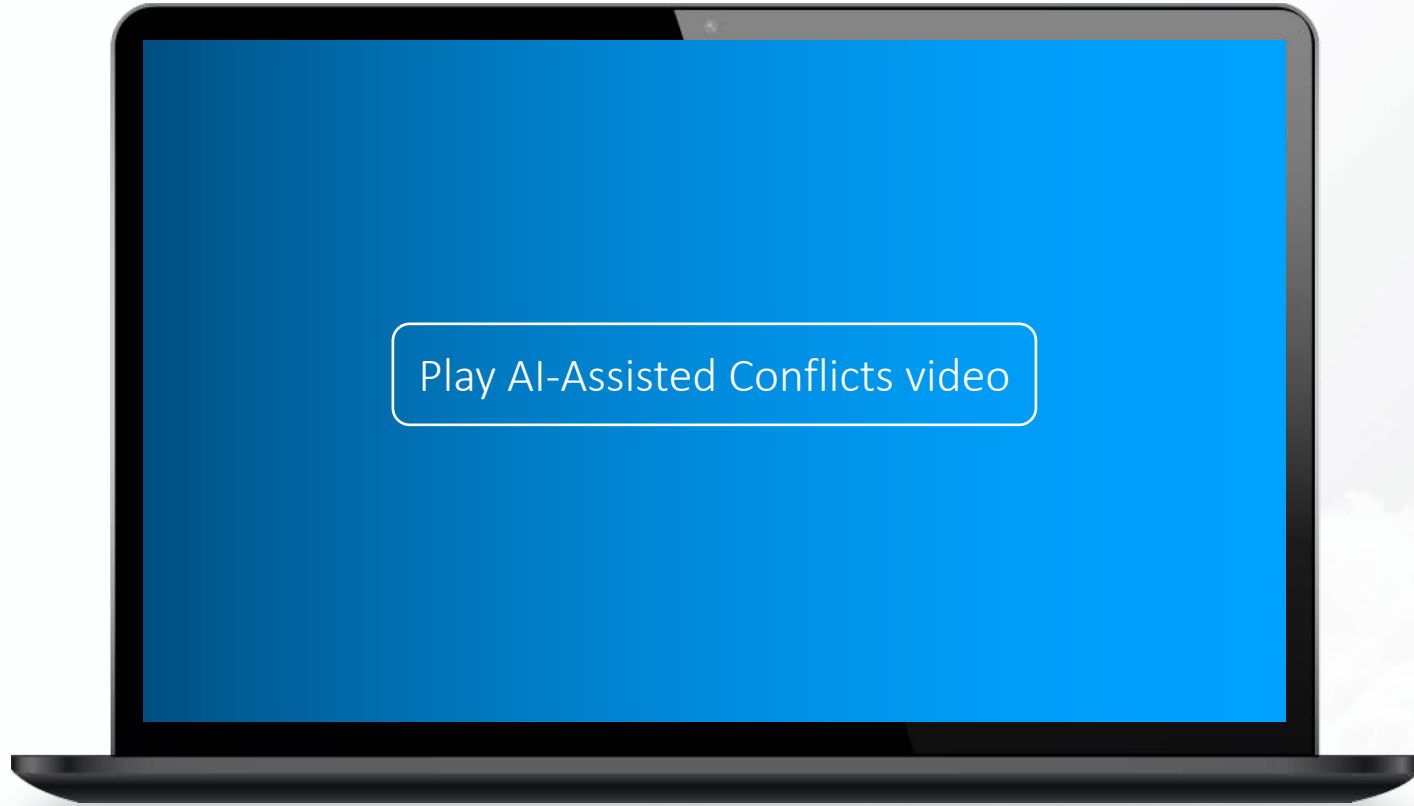
RSM

Craig Butler

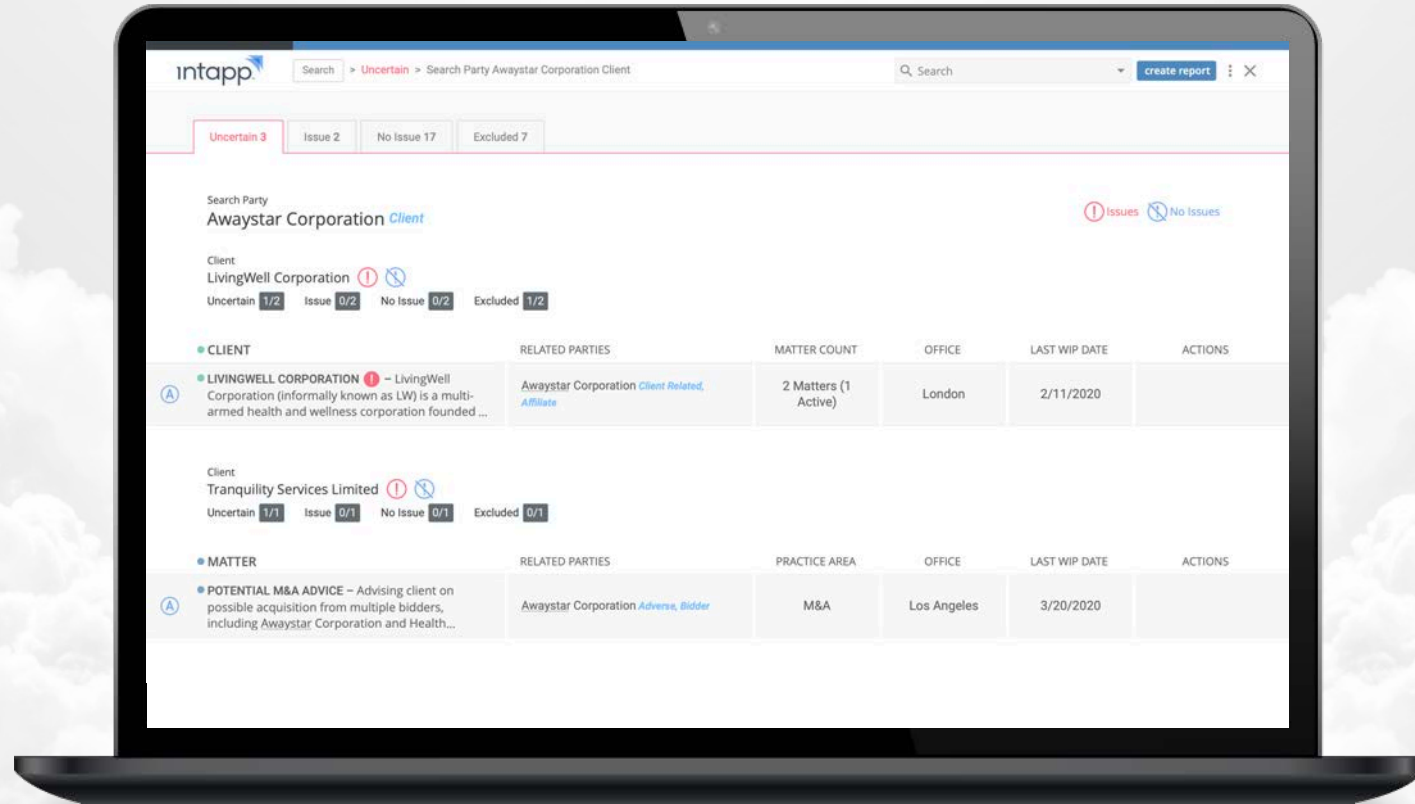
Senior Director of Audit Technology US



Meet AI-Assisted Conflicts Clearance



Play AI-Assisted Conflicts video



AI-Assisted Conflicts Clearance

Available now to all cloud-based Intapp Conflicts clients

It's Connected... Teams and People





FINNEGAN

Terra Liddell
Chief Marketing Officer

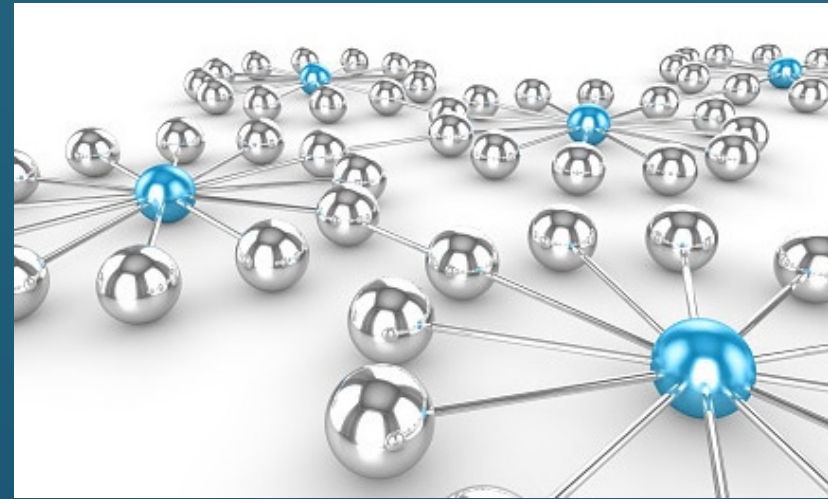
Relationships-aware Marketing

BEFORE



Contacts Out of Context

AFTER



Focused Targets

It's Connected... Technology



And One More Thing... Well, Three Actually

1

Client-Managed Key
(CMK)

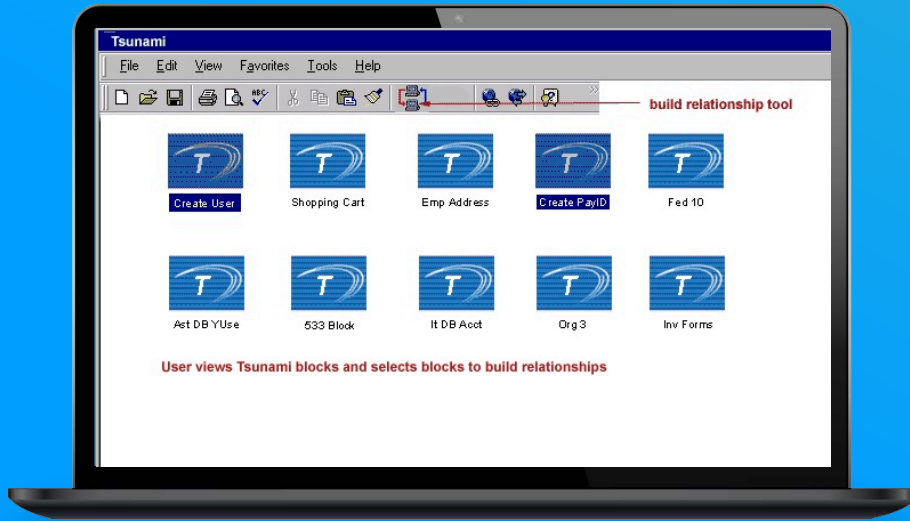
2

Common Data Service
(CDS)

3

OnePlace
Integration Service

The Foundation of the Connected Platform



Integration Builder, 2001



OnePlace
Integration

750

Intapp Integration clients

2000+

Integration instances

250,000

Total number of rules

350

Templates in rule library

1.8M+

Number of daily executed rules

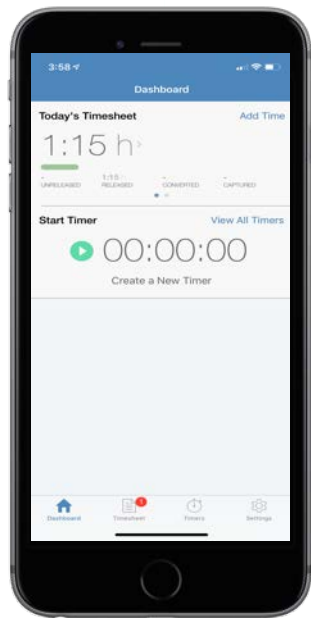
The Connected Platform in Action

[Play Demo](#)

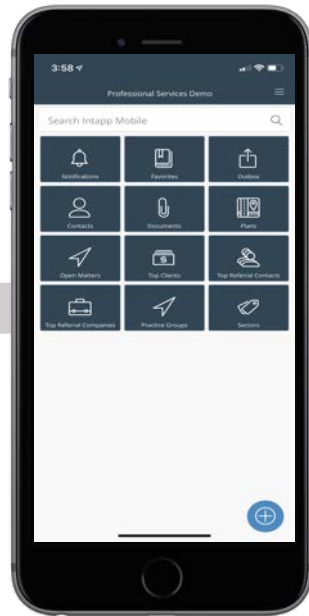


It's Connected... Experience

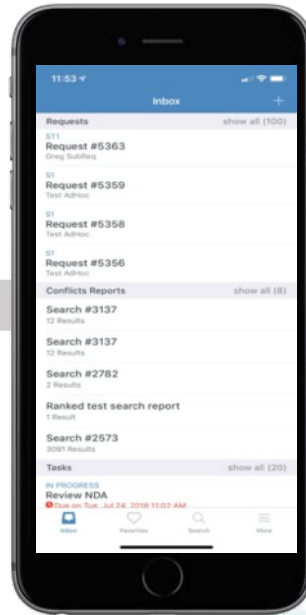
Connected Mobile Experience



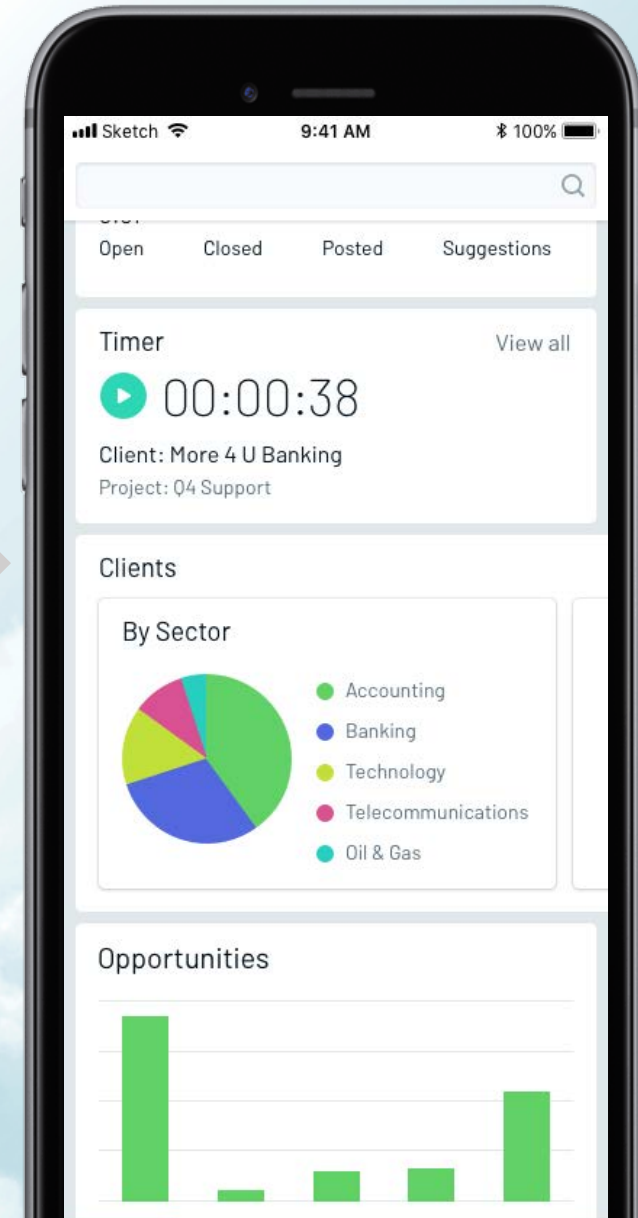
Time



Marketing



Business
Acceptance



Today's Announcements

Now Available

- Pricing and Engagement DNA
- AI-Assisted Conflicts Clearance
- Unified CRM + Relationship Intelligence
- Customer Managed Keys
- Next Generation Integration

Stay Tuned

We can't wait to share the next steps
in our connected platform with you!



Thank You for Taking
This Journey with Us

Explore Further

May 13
Wednesday

Marketing &
Business
Development session

May 14
Thursday

Operations &
Finance session

May 18
Monday

Risk & Compliance
session

May 20
Wednesday

IT & Innovation
session