

Intapp CIO Technical Briefing

Intapp Cloud Strategy

PRESENTED BY

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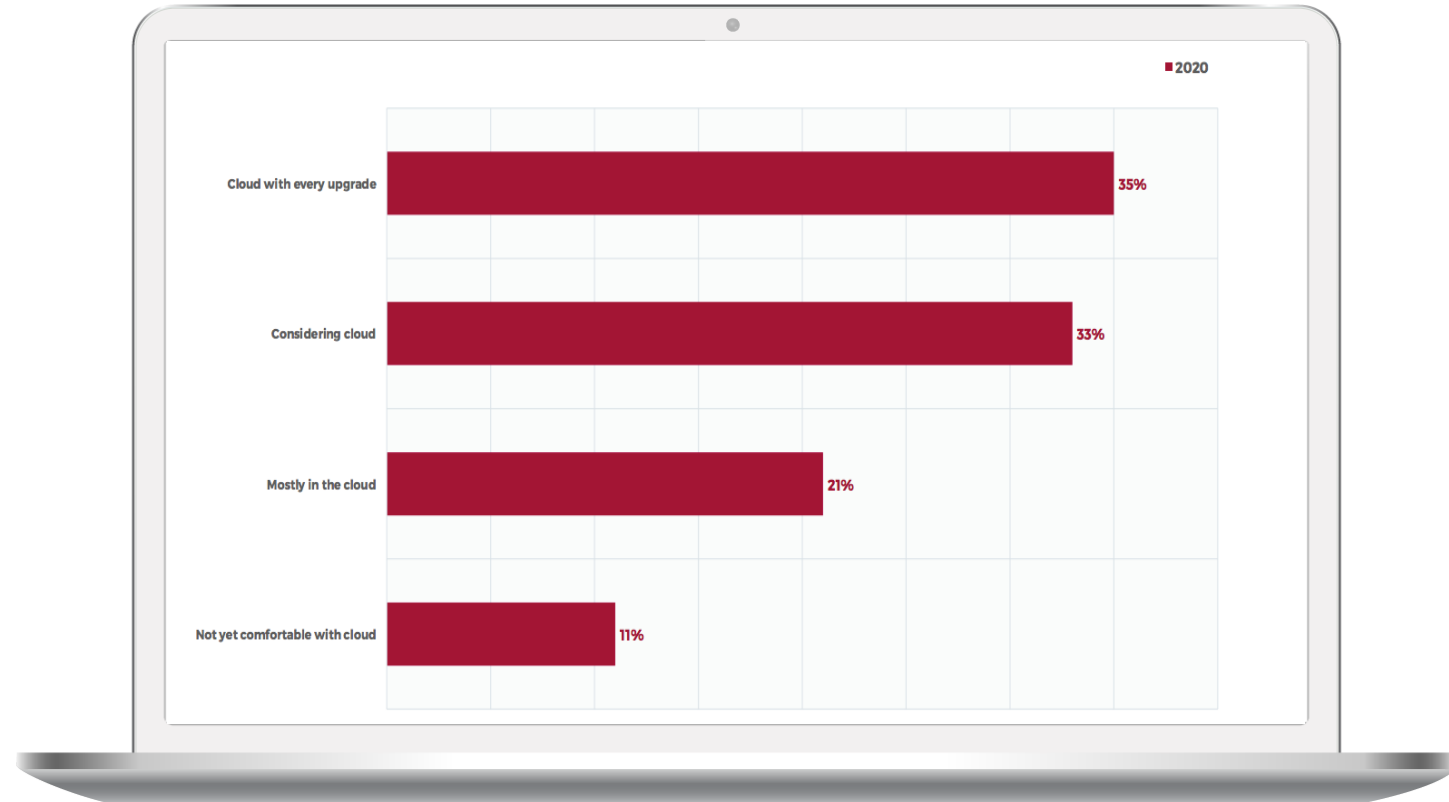
Agenda

- Cloud Momentum in Legal
- Intapp Cloud Strategy
- Cloud Migration Expert Discussion:
 - Moving OnePlace Risk & Compliance and Intapp Time to the Cloud
 - Preparing for Cloud Migrations
- Partner Panel: Approach to Cloud Migrations
- Live Q&A

Cloud Momentum in Legal and Intapp Cloud Strategy

The Legal Industry's Shift to the Cloud is Happening

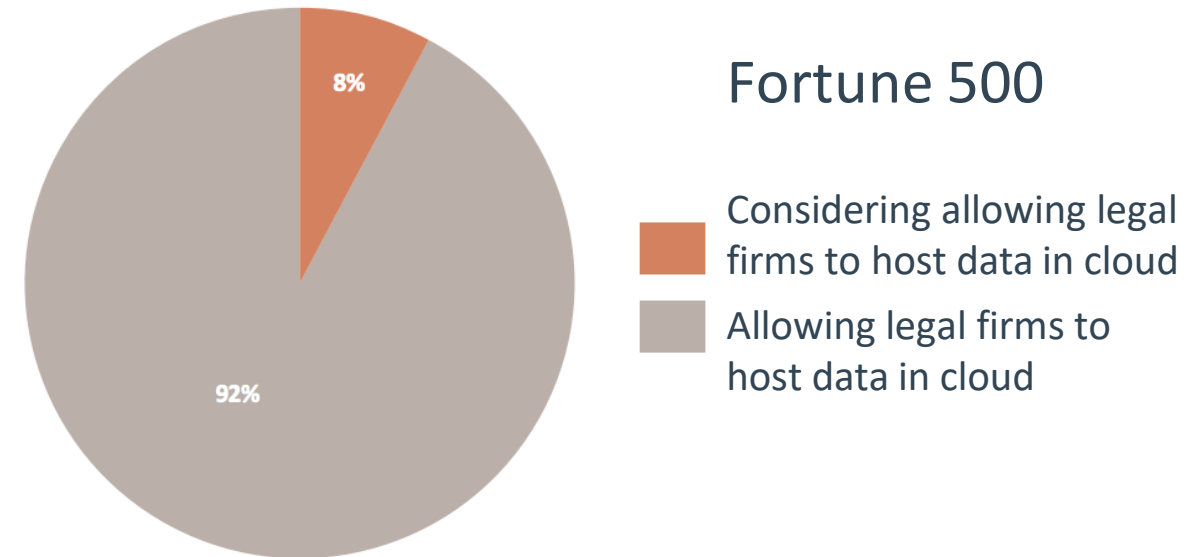
- **78%** store firm and client data in cloud
- **83%** feel comfortable with security
- **56%** report being cloud first or mostly cloud
- **34%** believe “mission critical” apps will move to the cloud in next 2 years



Source: ILTA Tech Survey, 2020

What Lead to the Change?

- Corporate clients' shifting attitudes towards cloud
- Success in shifting productivity and DMS applications to the cloud
- Recent success in leveraging cloud for collaboration
- Shift towards agility and continuous innovation
- Value in moving IT operations to a vendor



Source: CLOC (Corporate Legal Operations Consortium) Cloud Survey, January 2020

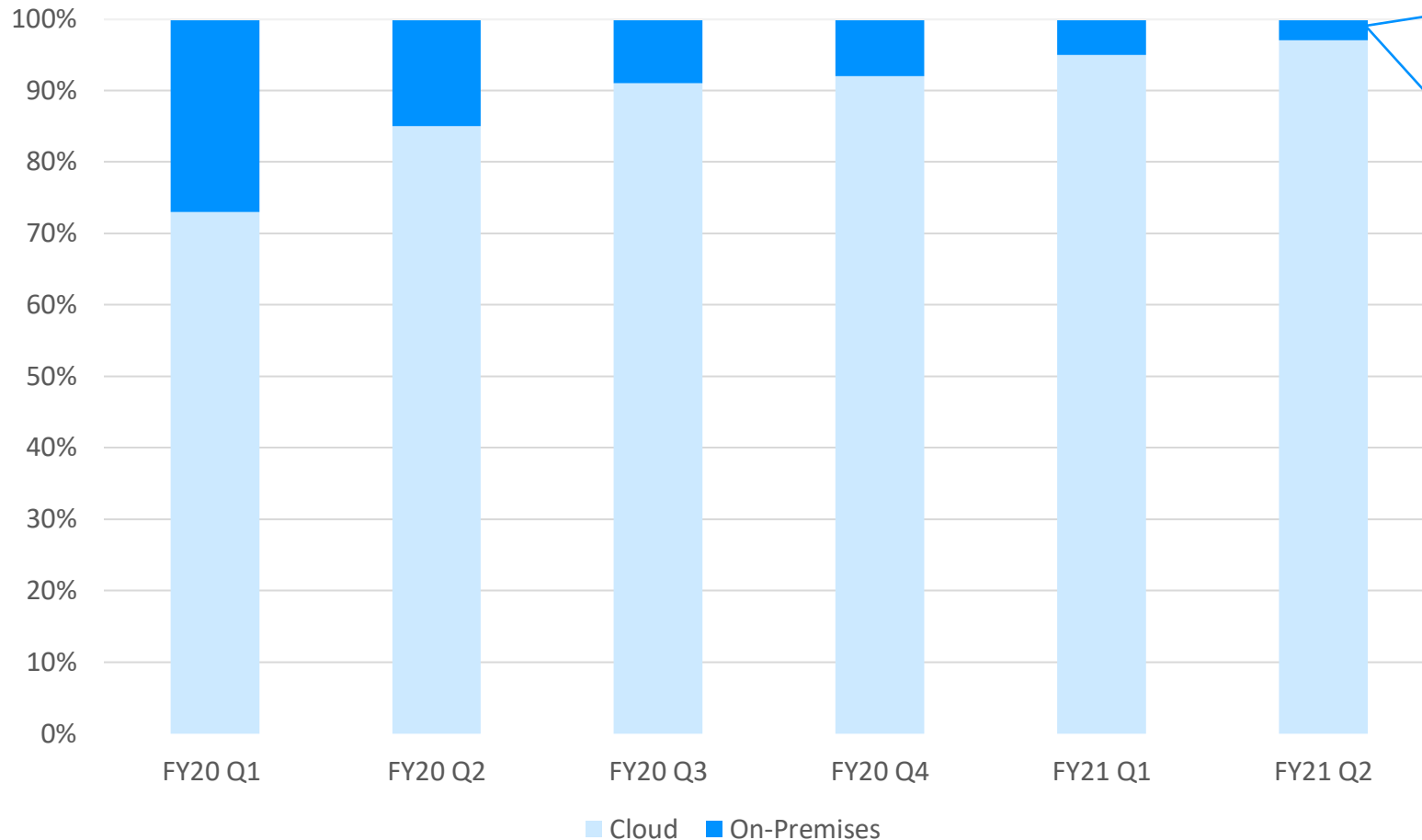
Yet Challenges Remain, as CIOs Strive to Make Progress Toward the Cloud

- Client contractual obligations include “no cloud” or “full control” clauses
- Data access and control concerns around sensitive client data, “silent subpoena”
- Loss of control of release cycle, security and service levels
- High one-time costs associated with migration of custom solutions



Intapp Cloud Momentum in the Previous Year

Cloud Products were **97%** of New-Product Purchases **in Q4 2020**



Cloud in 2020

- 89% of OnePlace Risk & Compliance purchases
- 86% of Intapp Time purchases
- 100% of Intapp CRM purchases

What You're Telling Us You Need to Succeed

Takeaways from Client Responses to the Sterling Client Satisfaction Survey

- 1. A Well-Defined but Flexible Program:** A thoughtful migration plan that you can feel confident about but that also caters to your unique needs and timeframes
- 2. An End-to-End Partner:** An expert team that works with you to ensure the success of your cloud adoption project
- 3. Continued On-Premises Support:** Assurance that Intapp will support your on-premises instances until migration is complete
- 4. A Focus on Delivering Expected Value in the Cloud:** A cloud roadmap and execution that focuses on the promise of delivering the connected firm value proposition while ensuring maximum security of client data

Intapp Cloud Strategy: Key Elements

Innovation Based on Cloud



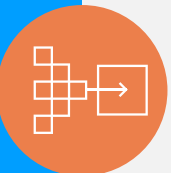
Shift new product development and initial deployment to the cloud

Continued On-Premises Support



Ensure our clients' business continuity by supporting their existing on-premises investments

Client-Defined Migration Timeline



Enable the shift to cloud at a pace that works for our clients, optimized to meet their goals

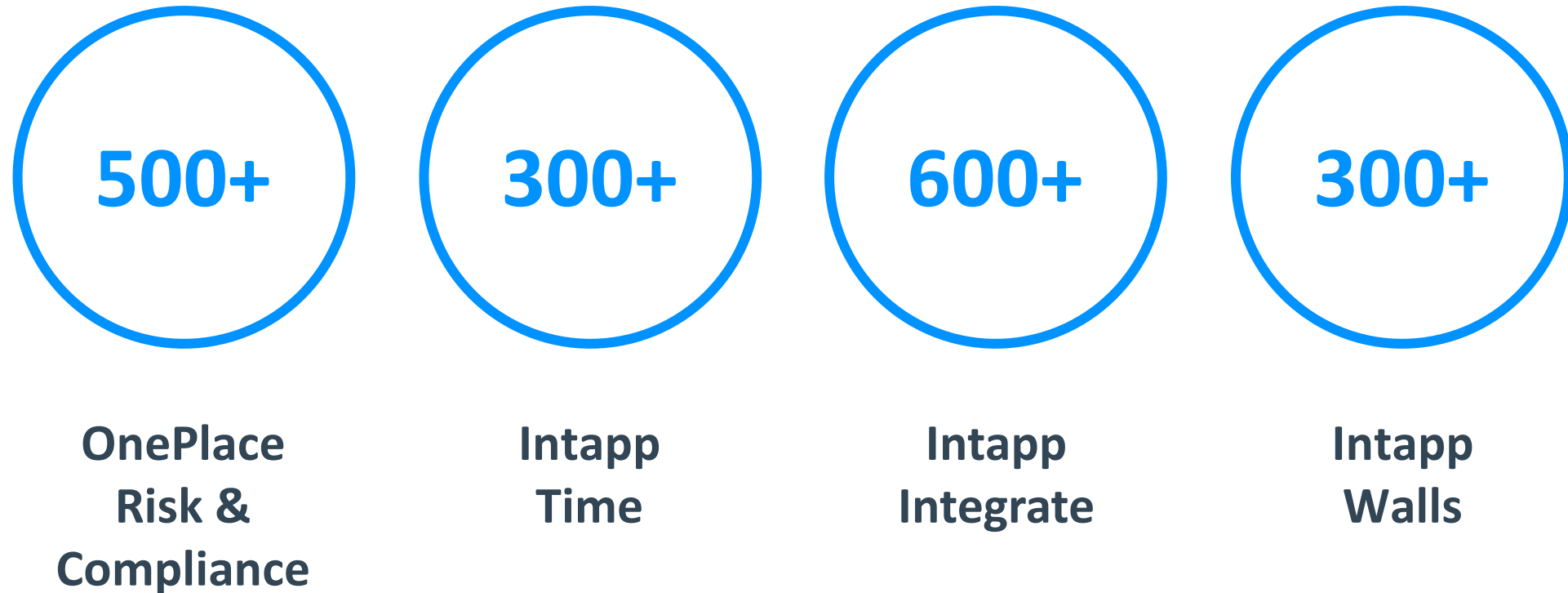
Holistic Migration Support



Provide a comprehensive set of cloud migration tools and services that span the migration lifecycle

Still, There's a Lot of Work Ahead

Cloud Migration Deployment Scope



Different Applications Demand a Different Approach to Cloud Adoption

- Bedrock of our business
- Path to cloud varies across Intake, Conflicts and Terms
- Getting to a hybrid state as a first step
- Already supports both on-premises and cloud apps
- On the roadmap: Intapp Walls as an Intapp Platform service



- Multiple legacy time applications
- Low impact, faster migrations
- Dependency with FMS migrations
- Intapp Integrate to co-exist with Intapp Integration Service
- Only migrate existing integrations opportunistically

What We'll Address Today

- What the Intapp “Cloud First” strategy really means
- Our plan to support Intapp on-premises apps
- The migration services and programs we offer today
- Your options to get started

Panel Discussion

Today's Panelists



**Chris
Kraft**

General Manager,
OnePlace Operations
& Finance



**Nigel
Riley**

General Manager,
OnePlace Risk
& Compliance



**Madaser
Yousaf**

Director,
Intapp Strategic
Consulting

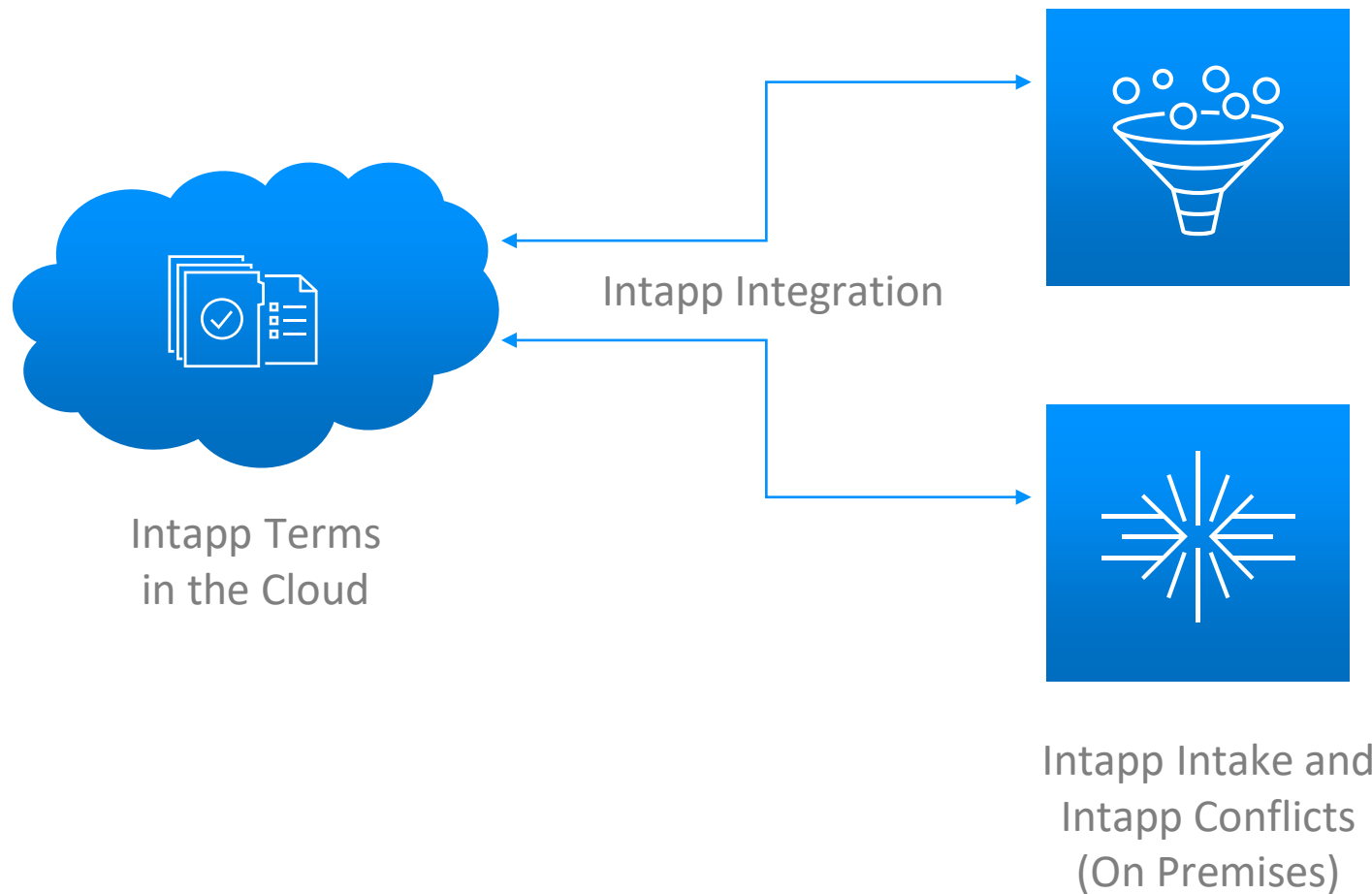
Getting Your On-Premises Intapp Intake Ready for the Cloud

Upgrade to the Latest Version

- Modernize Your API Infrastructure
- Adopt Virtual Tables
- Retire Query Integrations
- Upgrade Every 12 months until Migration to Cloud
- Modernize Integrations with Intapp Integration Service



Intapp Terms Cloud in a Hybrid Environment



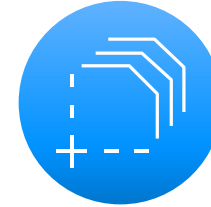
- Upgrade Intapp Intake and Intapp Conflicts to the cloud on your own timeline
- Access the latest features of Intapp Terms
- Experience all the benefits of the Intapp Secure Cloud through Intapp Terms cloud

Supporting your Intapp Time Migrations to Cloud



Intapp Time specific cloud readiness assessment

Estimate level of effort for the cloud migration based upon version, data volumetrics, customization and other factors. Get a custom migration roadmap delivered by our client success team.



Alignment with your FMS strategy

Whether you have just completed an FMS migration or in the process of planning for one, Intapp can support with when, where and how your Time migrations can fit in and show immediate value to the firm.



Entitlements with cloud




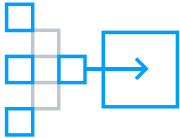
Finding the right OnePlace Operations and Finance package for your firm that fits your needs, unlocks new entitlements and value and provides you with a phased approach to your future needs.



Boosting the value of Time cloud with every release

Constant innovation including AI-based functionality, interoperability, infrastructure and security enhancements to ensure that there is a compelling business case for the move to cloud.

Key Considerations for Cloud Migration

Business	Technology	People and Operations	Data and Security
 <ul style="list-style-type: none"> • Gain buy-in from senior leadership and clients • Develop a cloud strategy in alignment with broader business vision and goals • Clearly articulate cloud design principles, rationale, and business benefits • Understand and counter any internal and client objections • Develop and communicate a robust business case • Set up appropriate governance forums 	 <ul style="list-style-type: none"> • Conduct a cloud technology assessment to identify application opportunities • Develop a technology/cloud adoption roadmap • Create a clear and robust integration strategy • Apply an incremental adoption approach • Define and agree to appropriate SLAs to manage all applications 	 <ul style="list-style-type: none"> • Assess future IT function needs to support cloud adoption • Increased focus on collaboration with the business via IT business partners • Ensure greater focus on the impacts of cloud migration on user experience • Cultivate cloud skills internally • Ensure people are adequately supported in managing cloud service provider (CSP) relationships and associated SLAs 	 <ul style="list-style-type: none"> • Conduct data assessments to identify what data may reside in the cloud • Ensure appropriate access to data is provisioned • Embed data management and governance as a firmwide activity • Verify security and policy-based compliance • Maintain cloud security parity across all distributed environments (e.g., multicloud, on premises, hybrid)

How our Strategic Consulting team can help

We have a global Strategic Consulting advisory team that includes Big 4 Consulting trained professionals who work with executive management and C-suite of leading firms

Strategic Consulting delivers digital and operational transformation providing sector specialist expertise to firms. Key support areas include:

- Cloud readiness assessment and roadmap design
- IT strategy review and roadmap design
- Data management and governance framework
- Case for change development and stakeholder alignment
- Change management and adoption support

Key contacts:



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VP & Head of Strategic Consulting

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Madaser Yousaf

Director, Tech Strategy & Architecture

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Map Your Journey to the Intapp Secure Cloud

500+

**OnePlace
Risk &
Compliance**

300+

**Intapp
Time**

Assess



Plan



Prep



Test



Migrate



**Intapp
Secure Cloud**

Intapp Services and Partner Panel Discussion

Panelists



**Mark
Burgard**

Senior Director,
Architecture - Client
Services, Intapp



**Lindsay
Barthram**

Director, Client Development
and Intake Practice,
Wilson Allen



**Curtis
Russell**

Chief Operating Officer,
Aurora North



**Eric
Mosca**

Director of Operations,
InOutsource

Key Recommendations

- Intapp Certified Implementer
- Cloud Assessment
- Make On-Premises Cloud Ready
- Decouple process improvements from migration
- Migrate to the Intapp Cloud
- Monitor & manage Intapp Product Releases



Engage with our Partners

Cloud Readiness Assessment

- ✓ Understand and audit
- ✓ Estimation of effort to migrate
- ✓ Insights to current deployment
- ✓ Recommendation and best practice

OnePlace Risk & Compliance (Intake, Conflicts)

- ✓ Refactoring
- ✓ Data transition
- ✓ Integration modernization
- ✓ Introduction of IIS

OnePlace Operations & Finance (Time)

- ✓ On-prem migration/upgrade
- ✓ Rekoop/DTE transition
- ✓ Introduction of IIS



wilsonallen.com



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InOutsource

Your Best Partner for Intapp Risk Projects

New Business Intake | Conflicts | Terms | Cloud Migrations | Flow for Risk



Unmatched Talent

- Certified Intapp team
- 14 full-time experts
- 4 integration specialists
- 3 lawyers



Unmatched Experience

Deep Intapp history, understanding and collaborative partnership



Unmatched Results

100+ Intapp Projects

100% Success Rate

Contact: emosca@inoutsource.co

Intapp, Inspired

Enabling the greatest ROI from your Intapp investments

Over the past fifteen years, Aurora North has made an unmatched investment in developing unique Intapp expertise and unrivaled track record of success.

We apply that knowledge, experience and best practices to serve clients across the globe. Our seasoned team focuses only on law firms.

We bring deep familiarity with firm business applications and systems — and the policies, people and processes that must be addressed in order to most effectively execute projects and deliver successful outcomes.

That is why our project management approach emphasizes human factors, training and change management.

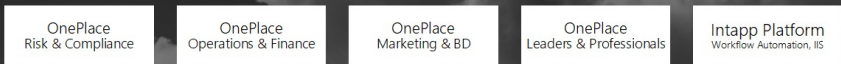
We have close relationships with Intapp and are certified to work across their entire product portfolio. As they grow, we continue to invest in growing our skills and experience across their evolving platform and solution set.

Cloud Migration and Upgrade Specialists

Now delivering solutions 100% in the cloud, Intapp enables law firms to achieve new levels of productivity and client service.

Whether your firm is looking to implement new Intapp solutions, or migrate existing products to the Secure Intapp Cloud, Aurora North stands ready to assist.

We've worked with many firms to navigate the choices, challenges and opportunities these projects present. We know the issues, particularly around mapping existing processes, integrations and requirements to the Intapp Cloud.



Contact:

Curtis.Russell@auroranorthsoftware.com

AURORA NORTH

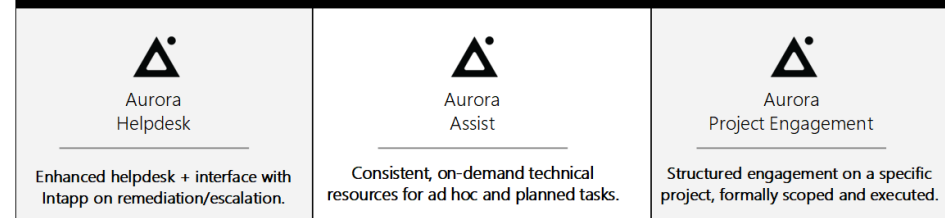
Introducing Aurora Assist ("Intapp Service as a Service")

This new offering fills a critical niche between standard Intapp helpdesk support and formal project engagements that typically focus on tackling more substantial initiatives like product implementations or cloud migrations.

With Aurora Assist, firms get predictable, consistent access to skilled consulting resources — Intapp-certified experts ready to help in multiple ways, including: answering questions, designing solutions, providing advice, training, and co-development help — and even executing common tasks and projects.

It's like having another skilled in-house resource on your Intapp team that you can turn to whenever you need assistance — because you can. The net result is you can move farther, faster — making consistent progress on your Intapp journey, without the overhead associated with scoping one-off consulting engagements on a per-project basis.

Enriching the Intapp Ecosystem



A Small Sampling of How Firms Can Use Aurora Assist:

- System upgrades (non-cloud applications)
- On-demand training and education
- Collaborative development (CID/CWID)
- Conflicts search training
- Building Integration rules and connectors
- Designing and implementing business process workflows
- Developing analytical reports
- Creating ethical walls
- Adding block billing to Time
- Modifying Intake/Flow forms
- Integrating Walls/Conflicts/Intake

The background of the slide is a blurred photograph of a meeting. In the foreground, a man with glasses is pointing at a screen with a pen. The image is overlaid with a semi-transparent blue and purple filter. Various data visualization elements are superimposed on the image, including a candlestick chart, a line graph with a white arrow pointing upwards, and several vertical bars in red and green. The overall aesthetic is professional and tech-oriented.

The ROI of Intapp Secure Cloud

Exclusive Cloud-Only Capabilities such as Unified In-App Cloud Reporting

- All Intapp products leverage the same reporting service ensuring a consistent end-user experience
- Modern and powerful tool with comprehensive self-service capabilities



Highly Secure and Purpose-Built

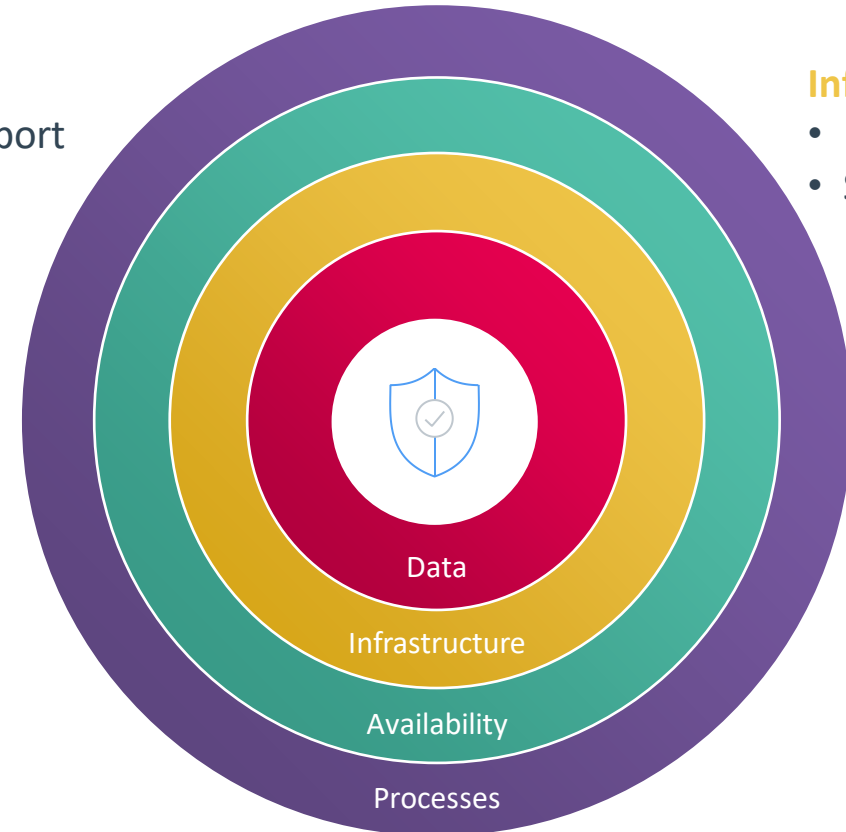
- Isolated data tenant
- Comprehensive data encryption
- High availability with auto scaling
- Unmatched process certification

Data

- Global location support
- Per-tenant data isolation

Infrastructure

- Data encryption
- Single Sign-On


































Availability

- High-availability architecture
- Disaster recovery

Process

- Awarded CSA STAR
- ISO and SOC2 certified

Best-of-Breed Meets Industry-Specific

	ISO Certified (27001/17/18)	SOC 2 Report	CSA Gold Star	Trust and Public Status Site	Industry-Specific
					
Salesforce					
Microsoft					
NetDocuments					
Aderant					
Elite					

An Agile Approach that Lowers Overall Risk



Rapid and iterative updates rather than an annual cadence that can cause disruption and soak up time and resources



Predictable Release Cadence

- Quarterly release for major features that impact users
- Monthly minor, non-user-impacting releases
- Biweekly maintenance and defect releases

Best-in-Class Release Practices

- UAT environment available 2.5 weeks prior to release
- Release notes made available on community and file share
- Feature flags for distribution control

Deliver on the Operational Benefits of Cloud

- **Reduced IT Costs:** No additional cost for Intapp cloud vs. on-premises version
- **Autoscaling:** Intapp cloud will autoscale resources based on data volume and usage
- **Faster support:** Rapid response and resolution to issues with direct access to the system
- **Better SLAs:** With 99.9% availability commitment
- **Zero-downtime upgrades:** No need to schedule downtime for most upgrades



Now there are no surprises lurking behind the curtain. We're always working with the latest version of everything, and have a very good feel for what our software actually costs.

- Karen Lockhart, Director of Business and Practice Applications, Baker Botts

Move to cloud-based deployment of Intake and Conflicts enabled the firm to budget proactively and avoid unpredictable expenses.

Thank You