Intapp Experience

The Experience Management Challenge

Experience and expertise are key differentiators for legal and professional services firms in today's highly competitive market. Firms are under tremendous pressure to deliver new business proposals that address clients' unique requirements.

Too often, however, firms find it challenging to find the relevant information and respond quickly to RFPs. Many firms rely on personal recollection about who has experience working in particular practice areas, sectors and geographies — or on last-minute scavenger hunts for data which often produce a sub-optimal result.

Others find themselves relying on a small set of manually curated credentials that do not accurately reflect the firm's true capabilities. Many firms already have first-generation systems in place to try to address the problem, but they typically rely on busy lawyers and staff manually entering information after the fact, with little or no understanding of why the information is needed.
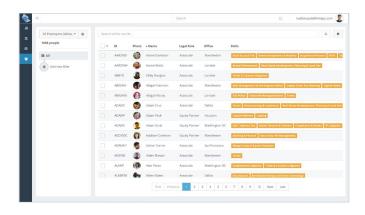
Win More Business

The ability to quickly provide relevant examples of how the firm has delivered value to its clients and identify experts with the right skills, knowledge and experience is critical to winning new business, cross-selling and better serving existing clients.

By integrating data from your firm's directory, HR and finance systems with information captured at key stages such as business acceptance, time entry and matter close, Intapp Experience provides marketing, business development and the practitioners themselves with a robust, comprehensive view of the firm's past experience.

The Intapp Experience management system provides a reliable one-stop source of searchable information on lawyers, matters and clients that allows you to quickly find and organize the answers that you need for RFPs, pitches and capability statements — and articulate the unique value that your firm can deliver to clients and prospects.

Intapp Experience Management – Features and Benefits

The Intapp experience management system brings data together to provide a proactive, structured and consistent approach to a previously ad hoc reactive process.

Key features include:

Embedded workflows: Automating processes

- Capture experience information at the most opportune times in the matter lifecycle

- Easily create pitches, proposals, biography lists, deal sheets, directory submission and other marketing materials from firm-branded templates

- Quickly bring laterals into the fold with automated data uploads

Profiles: Creating a complete picture

- View rich profiles that are automatically compiled to track the relevant expertise and knowledge associated with each lawyer, matter and client

- Leverage powerful analytics on financial performance as well as detailed breakdowns on the type of work performed and timekeepers involved

Depth & breadth search: Find the needle in a haystack

- Find the right person for the job through Google-like search to surface lawyers with a proven track record for a specific skillset in a certain industry and/or practice area

- Uncover even the most obscure experience at the firm through sophisticated filters

Ease of use

- Intuitive user experience for marketers, business developers and lawyers alike

- Enforce security protocol across the platform through ethical walls capabilities and conflicts integration