

Intapp Technical Briefing:

Connected Firm Cloud

PRESENTED BY

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Product Management-
Cloud Data &
Integration



Agenda

- The Connected Firm Strategy - Thad Jampol
- The Intapp Platform - Jose Lazares
- Data and Integration - Dan Harsell & Milan Bobde
- Artificial Intelligence – Dan Harsell
- Live Q&A



The Industry at an Inflection Point



Supercharge your people. Unlock your collective knowledge.

Partnering with You to Become a Connected Firm

Connecting your people, processes, and data



The Connected Firm Mandate

- Holistic digital strategy
- Digital transformation
- Data-driven firm/practice



All-in-One-Place Data

Capture the data

Harness the data

Activate the data

intapp™



Meet the One Place to Manage Your Connected Firm

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

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



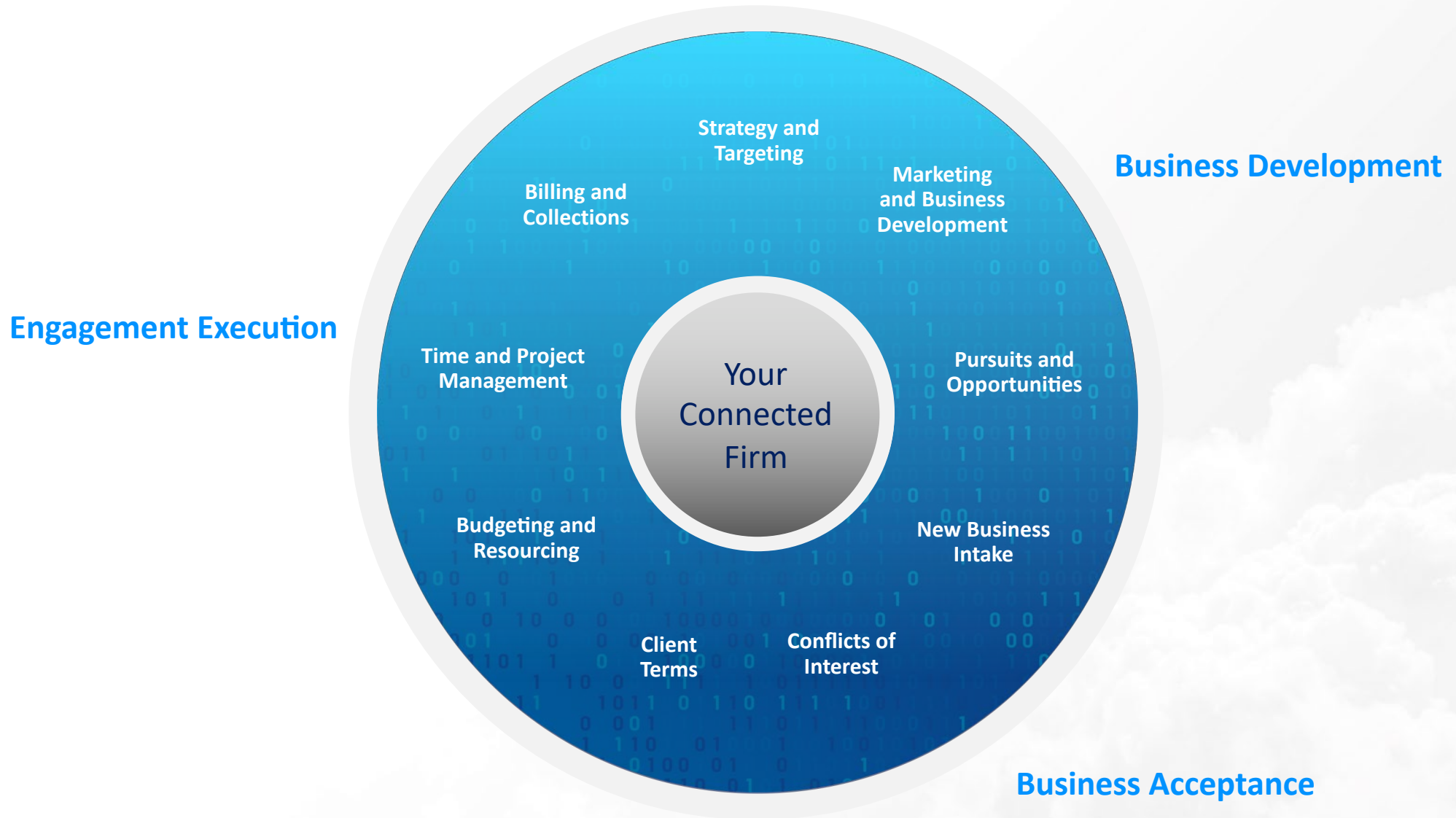
-
- Relationship Intelligence
 - Campaigns and Events
 - Experience and Expertise
 - Key-Client Programs

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

The background of the slide is a photograph of a meeting. A man in a suit and glasses is in the foreground, pointing at a screen. Behind him, other people are visible, some looking at a screen. The image is overlaid with a blue and purple color scheme and various data visualization elements like a network graph in the top left, a candlestick chart, and a line graph with a grid.

The Intapp Platform: Powering the Connected Firm

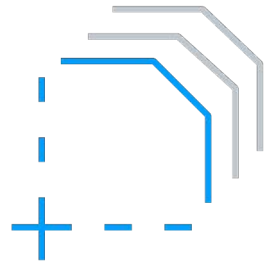
The Connected Firm Lifecycle



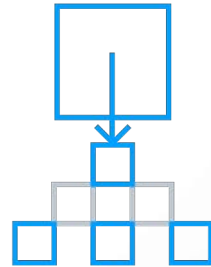
Challenges to Enabling the Connected Firm



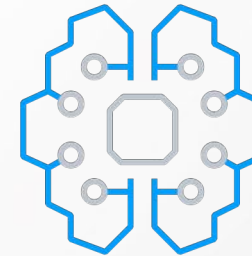
No single place to aggregate and manage your silos of data



Proliferation of applications creates disconnected processes



One off integrations make it hard to keep data in sync across systems and interfaces



Leveraging AI and machine learning to surface insights and lower cost to operate

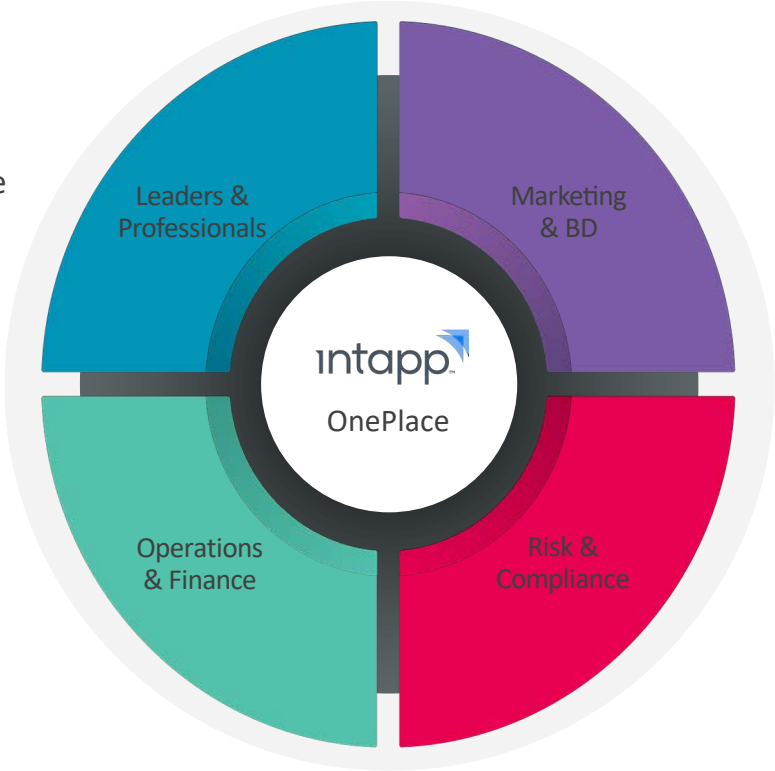


Enabling teams to embrace change

Intapp OnePlace Capabilities for Legal

- Key Client Management
- Unified Sector and Industry Intelligence
- Holistic Client Success Management
- 360° Matter Overview

- Automated Time Management
- AI-Guided Pricing
- Dynamic Profitability Modeling
- Budget, Time, and Billing Compliance
- Firmwide Matter Visibility



- Relationship Insights
- Campaign and Event Management
- Experience Intelligence
- Business Planning and Tracking
- Whitespace Analysis and Targeting

- New Business Intake
- Risk Scoring and Monitoring
- AI-Assisted Conflicts Management
- Client Terms Compliance
- Confidentiality Policy Enforcement

Audience Focused

Connected

Configurable

Mobile

Cloud Native



Intapp OnePlace: Available Now

OnePlace Marketing & BD

Relationship Intelligence
 Unified Mobile
 Microsoft Outlook
 Plug-In
 Enhanced List
 Collaboration
 Enhanced Marketing
 Automation

OnePlace Risk & Compliance

AI-Assisted Conflicts
 Approval
 Management
 Guided Terms Workflow
 Walls iManage 10.3
 D&B Firmographics

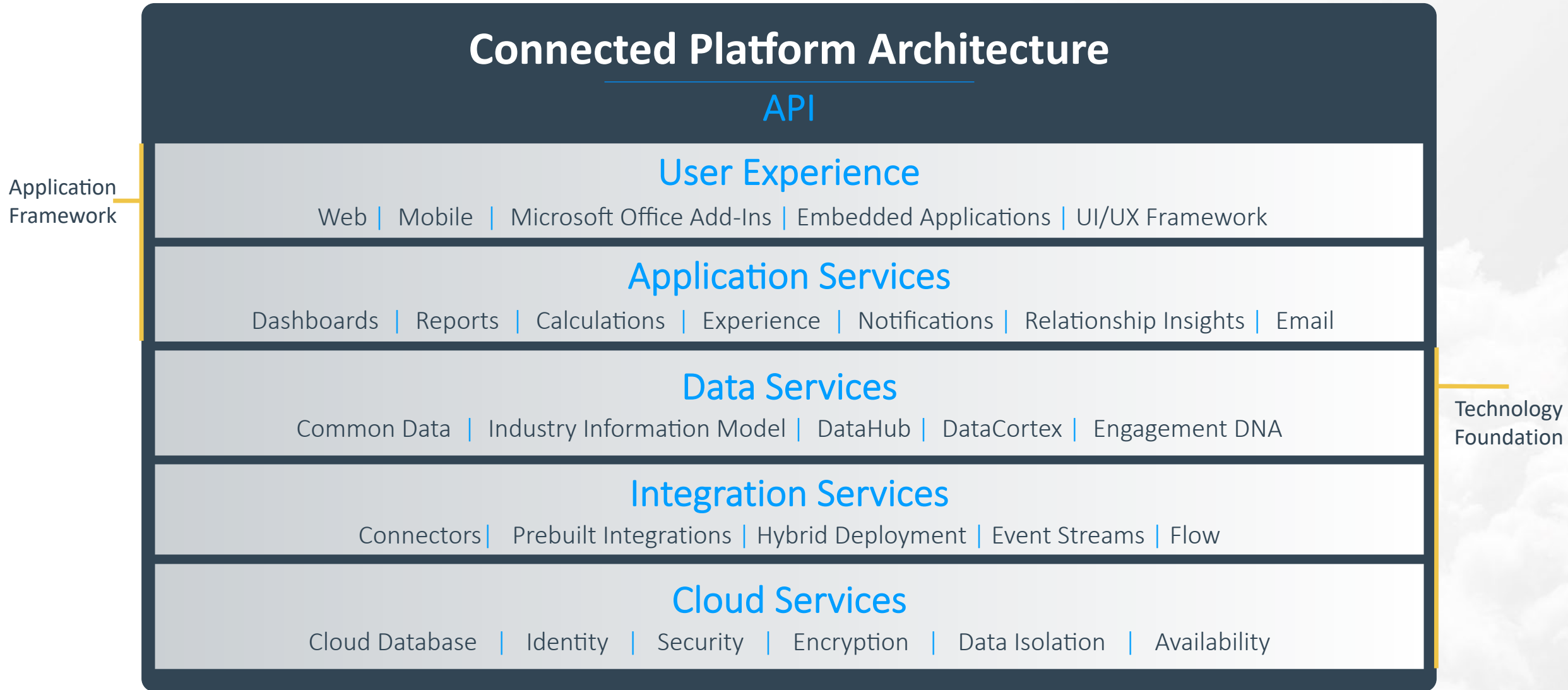
OnePlace Operations & Finance

Time Active Capture
 with Suggestion
 Time
 Terms Enforcer
 Quick Quoting
 for Lawyers
 Enhanced Matter Tracking

Intapp Platform

Common Data Service
 Intapp Integration Service
 Intapp Reporting Service
 Enhanced Third-Party Data
 Engagement DNA

The Intapp Platform



Intapp OnePlace Connected Platform Explained

Platform for “code-free” applications

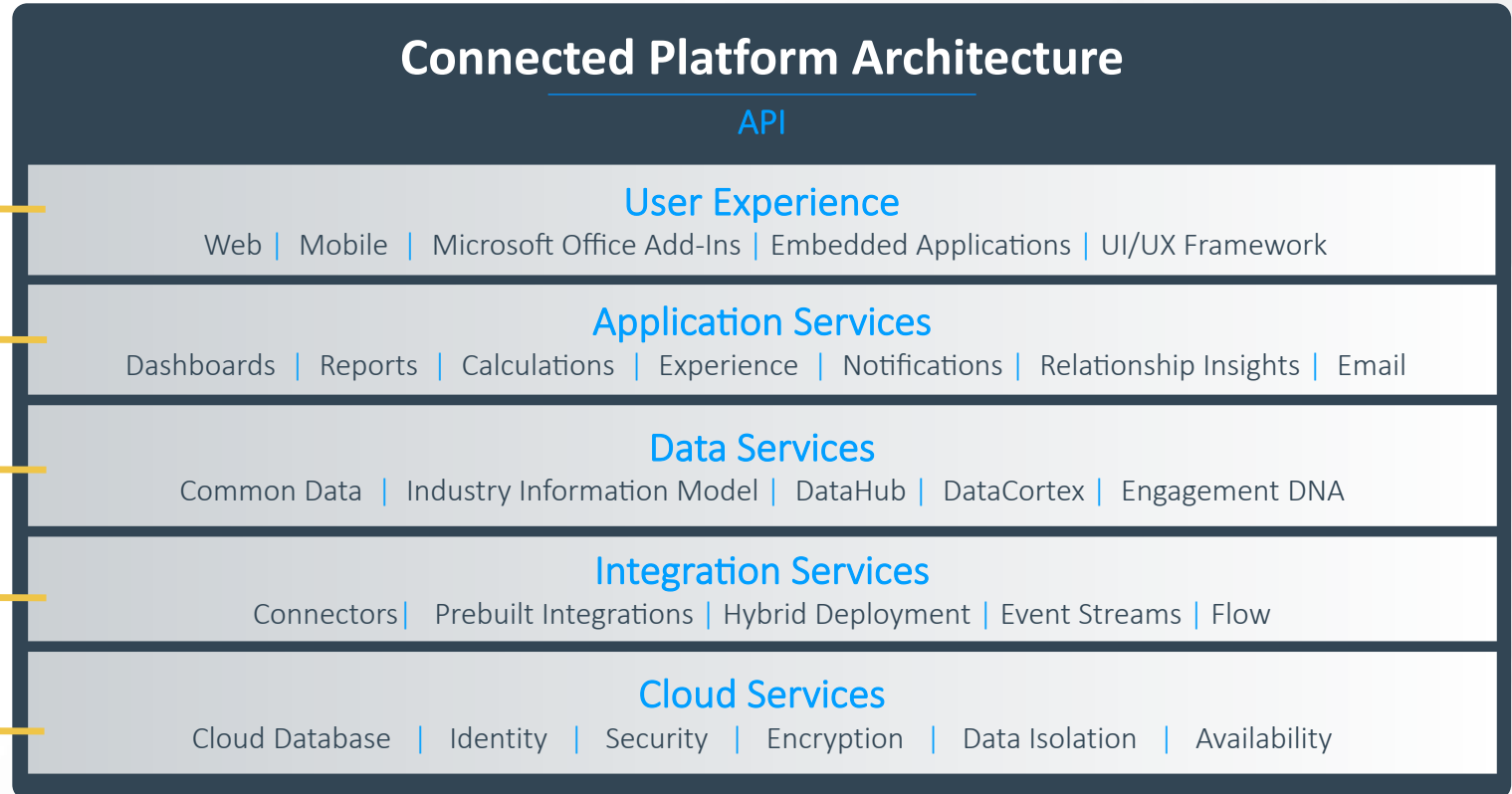
Provide a single experience that spans key user access points

Configure applications with reusable services

Ingest, master and leverage your firm's data

Connect any app or data source, infuse third-party content, and automate work

Scale on demand and protect your data with purpose-built services





Key Performance Indicators

\$7,277,375

\$3,221,164.0

\$25,000.00

\$6,258,543

86.0%

TOTAL BILLINGS

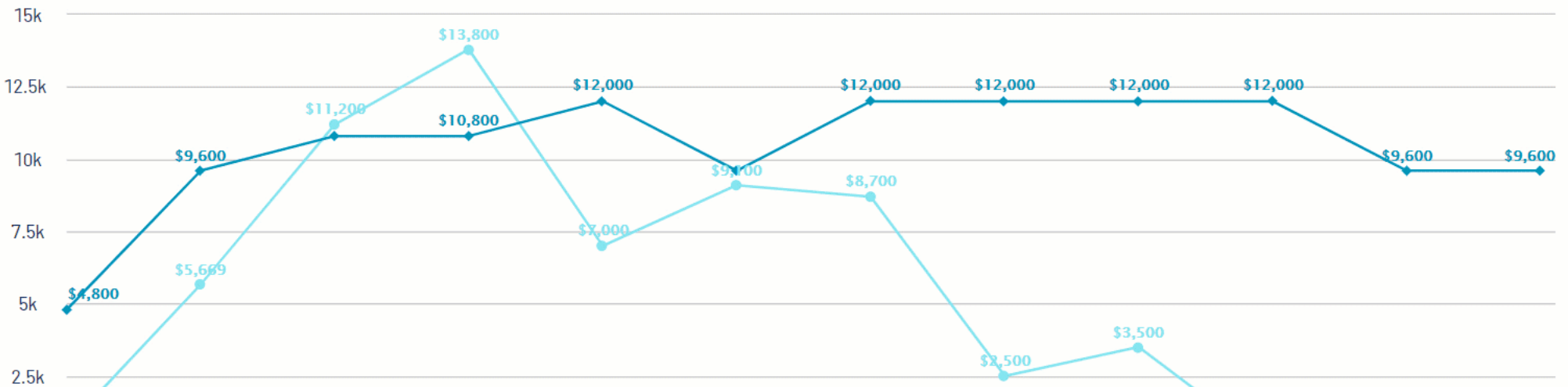
TOTAL PROFIT

YTD COLLECTIONS

TOTAL FEES COLLECTED

REALIZATION

Billings vs Target Month by Month



- Planning
- Firmwide Pipeline
- RFP Management
- Referrals
- Relationships
- Companies
- Activities
- Strategic Clients

- FAVORITES
- Microsoft
- Liberty Mutual Insurance
- Brad Smith
- Technology Merger and Ac...
- Show more...

Add new

Revenue Correlations

All Search OnePlace (alt+s)

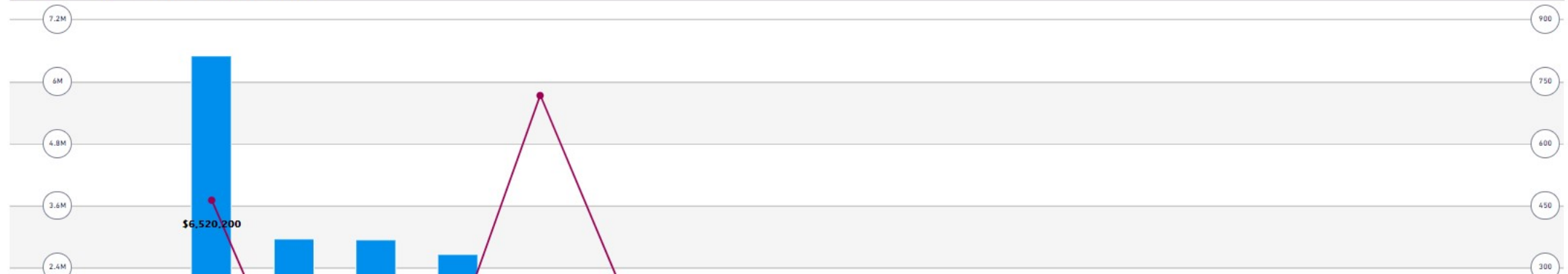


Revenue by Practice Revenue by Sector Profitability Revenue Correlations

Revenue by Practice vs Relationships



Revenue by Sector vs Relationships



Financial Performance

Planning

Firmwide Pipeline

Talent

Activities

Strategic Clients

Cases

FAVORITES

Microsoft

Brad Smith

Microsoft Key Client Plan

Technology Industry Plan

Show more...

+ Add new



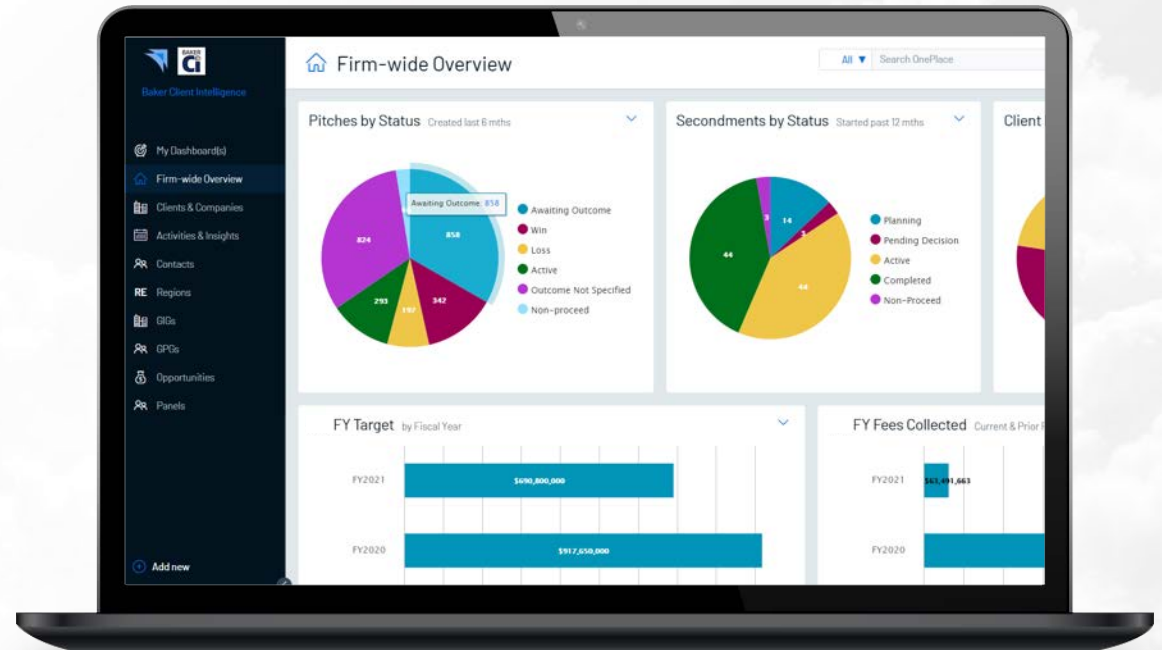
**Baker
McKenzie.**

Dan Surowiec
Chief Information Officer



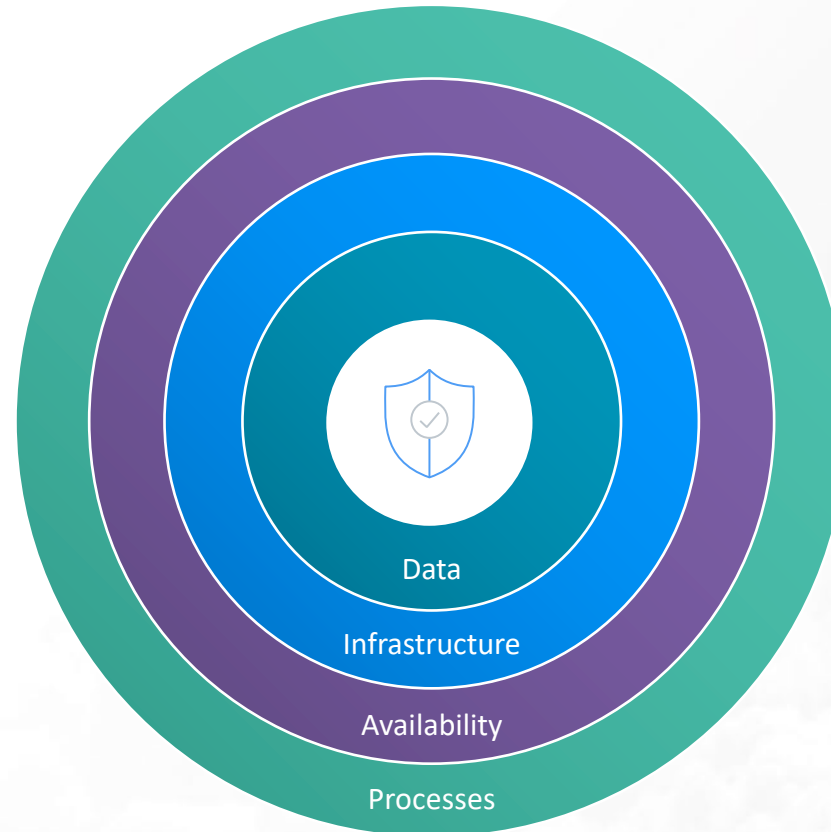
Executing Key-Client Programs via Baker Client Intelligence

- **Connected People**
Collaboration across client teams and roles
- **Connected Data**
A common view of key clients and related activities, all in one place
- **Connected Processes**
Consistent experience for Baker key clients



Intapp Cloud: Secure Foundation for Success

- Isolated data tenant
- Comprehensive data encryption
- High availability with autoscaling
- 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

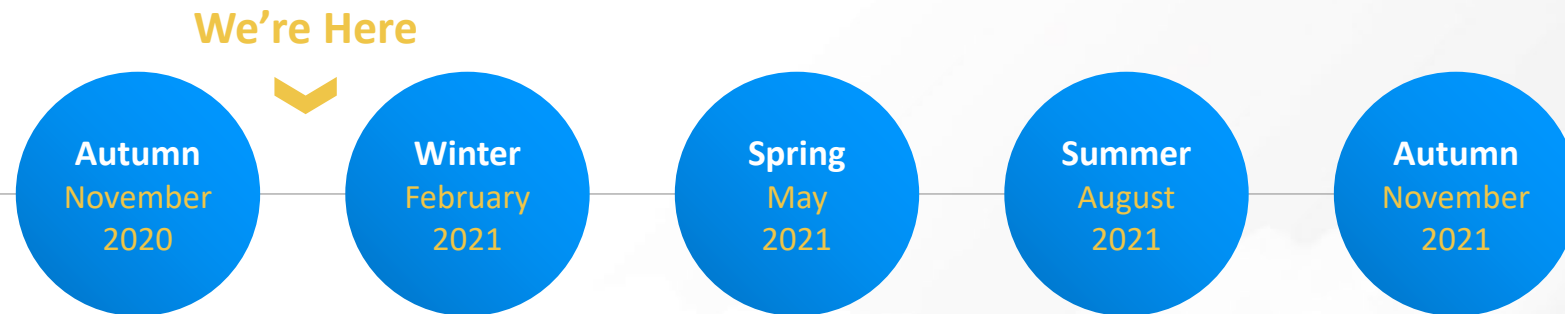
Best-of-Breed Meets Industry-Specific

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

Intapp OnePlace Cloud Release Summary



Seasonal major releases and continuous cloud delivery ensure an agile incremental approach that lowers overall risk



- Quarterly release for major features that impact users
- Monthly minor/non-user-impacting releases
- Biweekly maintenance and defect releases
- UAT environment made available 2.5 weeks prior to release for user testing
- Documented release notes made available both on community and file share

Intapp OnePlace Roadmap

Ongoing Innovation

**Winter
2020**

- Enhanced Marketing Automation
- Relationship Intelligence
- Integration Service: Risk and Time
- Time Enhanced UI/UX and Cloud Reporting
- Terms Dynamic AI Model

**Spring
2021**

- Practice Insights: IP & Litigation
- Microsoft Teams Integration
- Data Quality Automation: Contacts
- Integration Service: Financials
- Terms Billing Enforcement Service
- Enhanced Corporate Tree Management

**Summer
2021**

- Gemstone AI Personal Assistant
- Experience and Expertise Graph
- Integration Service: Marketing
- Massive Scale for 50K+ users
- Investment Banking Blueprint

**Autumn
2021**

- Unified Mobile
- Data Quality Automation- Companies
- Integration Service: Doc Management
- Engagement 360
- Enhanced UI/UX

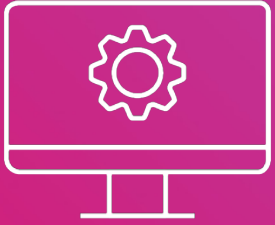
- Leaders and Partners
- Marketing and BD
- Integration Service
- Finance and Operations
- Risk and Compliance

The Intapp Platform Value for your Firm

intapp

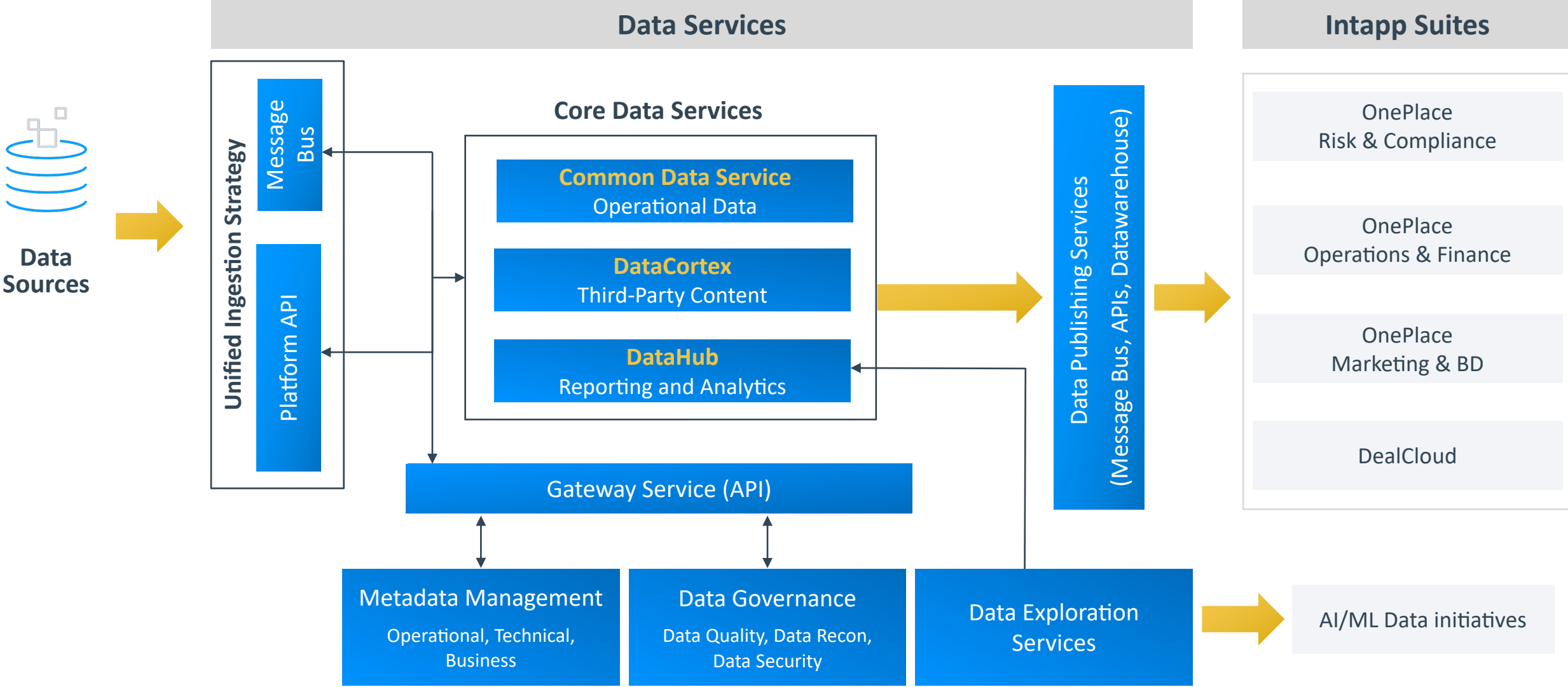


- **Integrated solutions** on a single platform enable access to the full client engagement lifecycle
- **A secure cloud foundation** protects your data and ensures compliance to evolving regulations and standards
- **A core set of data and AI services** allows your firm to unify and leverage data to drive insights and decision making
- **A set of prebuilt integrations and services** speed access to information and lowers the cost to implement



Data Services

Intapp Data Architecture



Intapp Industry Data Model

- Common definition
- Industry-specific focus
- Lifecycle enabled
- Extensible model



Marketing

Due Diligence

Maintenance

Close

EngKey
EngID
EngName
EngDescription

CreatedOn / By
ModifiedOn / By
PracticeAreas
Departments

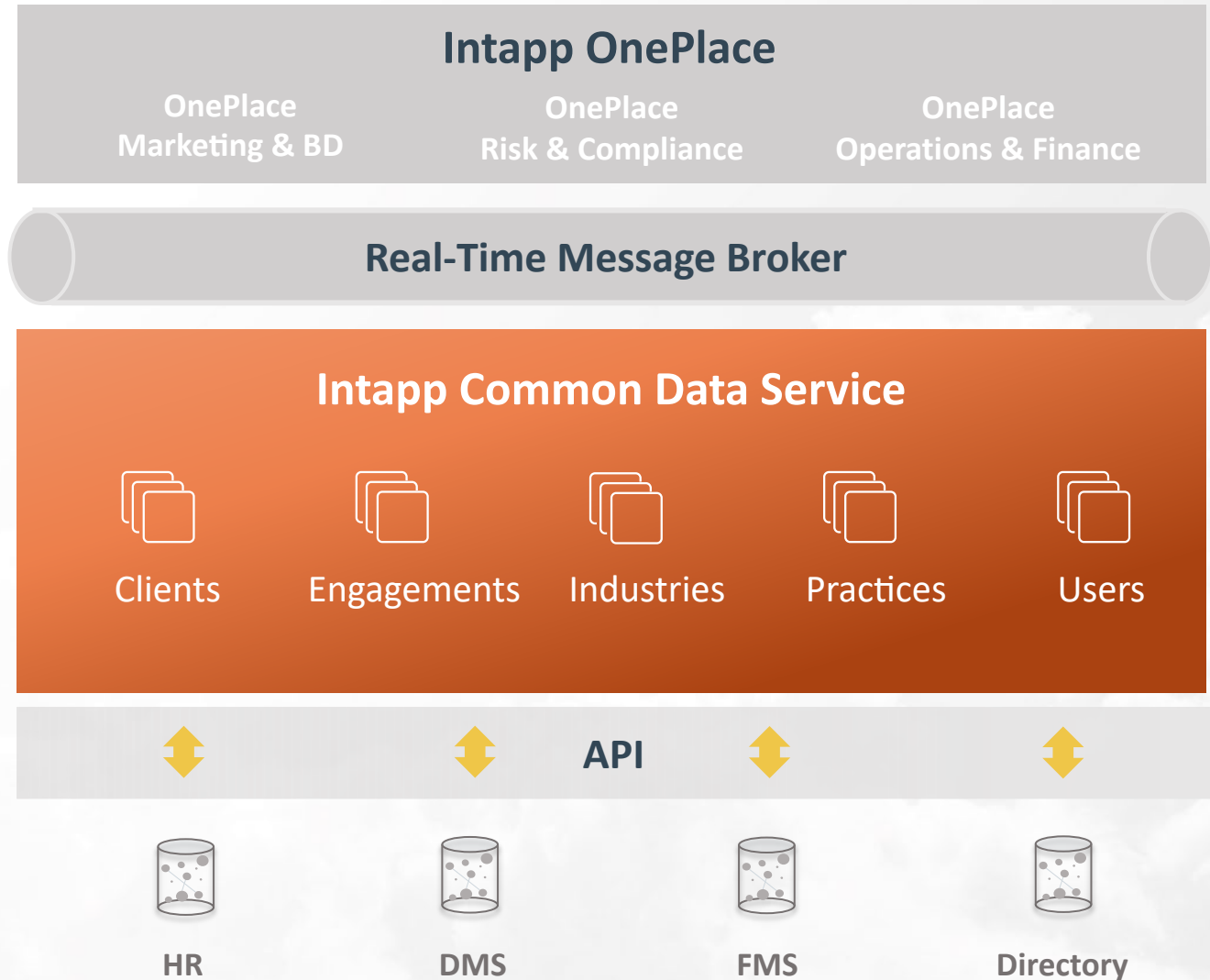
Locations
Regions
Work
Financials

customFields
Attachments
Security

EngType	Project, Billable Matter, Non-Billable Matter
EngStatus	Active, Inactive, Pending, Declined, Closed
EngStage	Opportunity, Pre-Matter, Matter
EngParent	Optional Link to a "Parent" Engagement

Intapp Common Data Service: Unify and Share Your Data

- Creates a single source of truth
- Synchronizes your firmwide data
- Provides real-time operating updates
- Accelerates time to deployment
- Enables connected processes



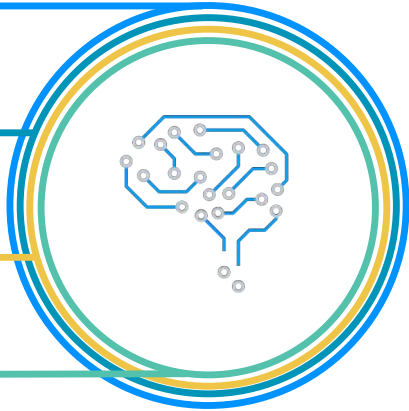
Intapp DataCortex

Clients/Companies

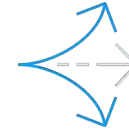
Opportunities

People

News



DataCortex



Corporate Tree View



Comprehensive Search



Networking



Composite Match

We continue to grow our network of data providers

Available now:

PitchBook

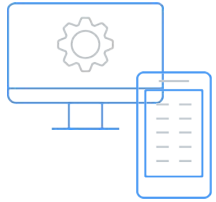


FACTSET

S&P Global

Leverage your third-party data across Intapp's platform

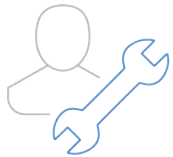
DataCortex Quick Facts



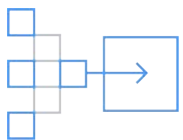
Accessible from desktop and mobile



Allows for custom workflows



Can be permissioned on a team or individual basis



Maps third-party fields to your taxonomy



Extends data across the platform, including reports



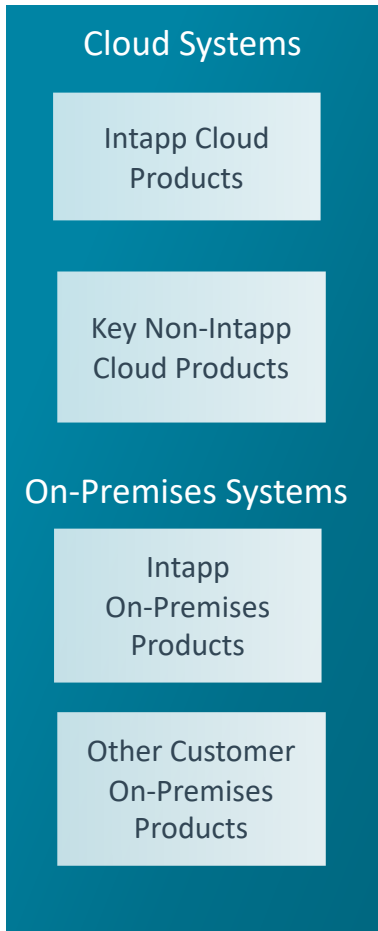
Automatically matched, enriched, and refreshed



Includes user-friendly tools for matching and linking

DataHub: Under the Covers

Data Sources



Message Bus

Platform API

Data Ingestion

Raw Zone



- Staging for data from all sources

Curated Zone



- Supports AI and machine learning
- Data exploration

Unified Data Repository

Unified transactional data store across all data sources

Publishing Data

APIs

Audience Data Marts

Business, Technical, and Operational Metadata Management

Data Quality and Data Governance

Presentation Layer

360-Degree Client Dashboard

Risk Dashboard

Matter Dashboard

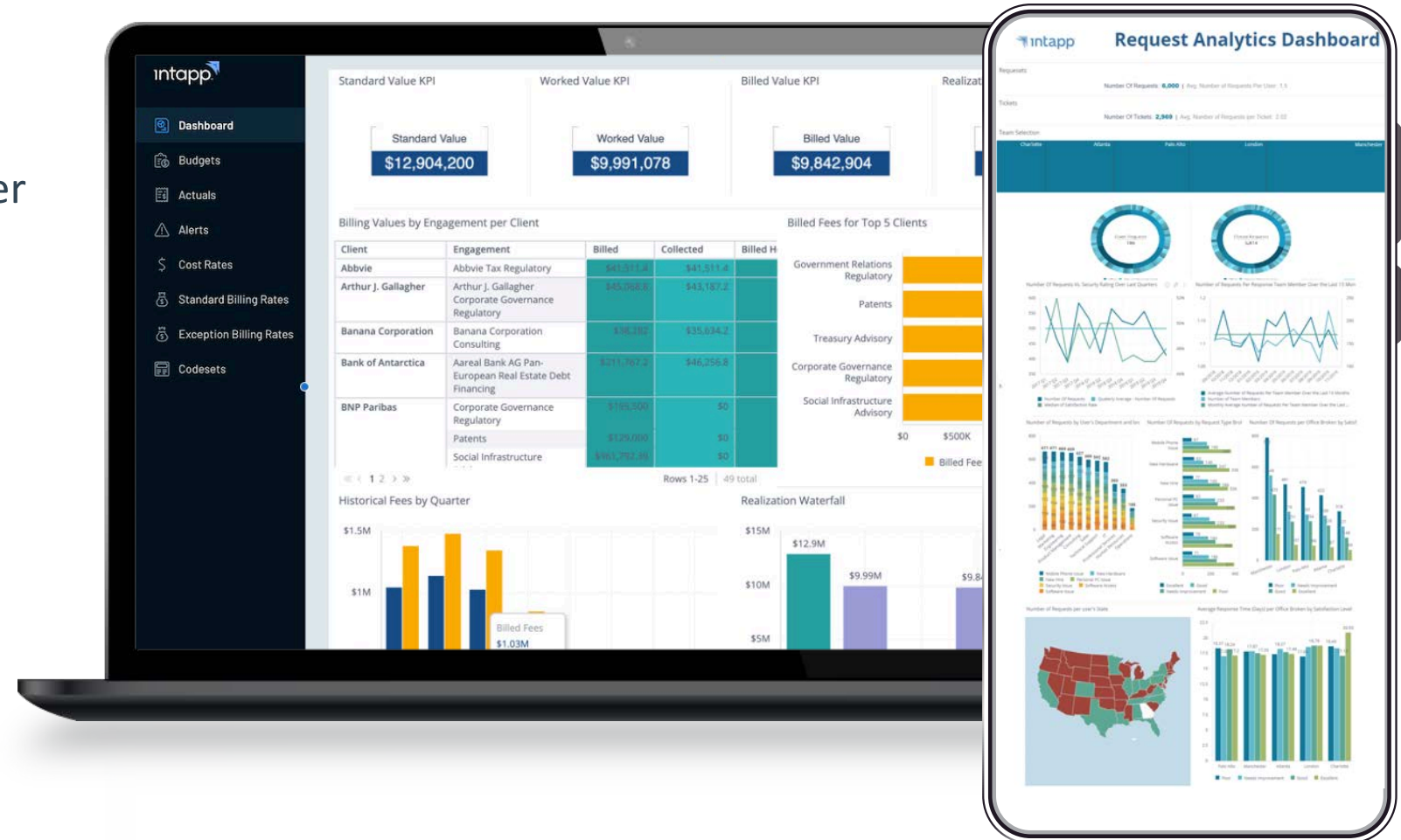
Unified In-App Cloud Reporting

Standardized

- All Intapp products leverage the same reporting service ensuring a consistent end-user experience

Embedded

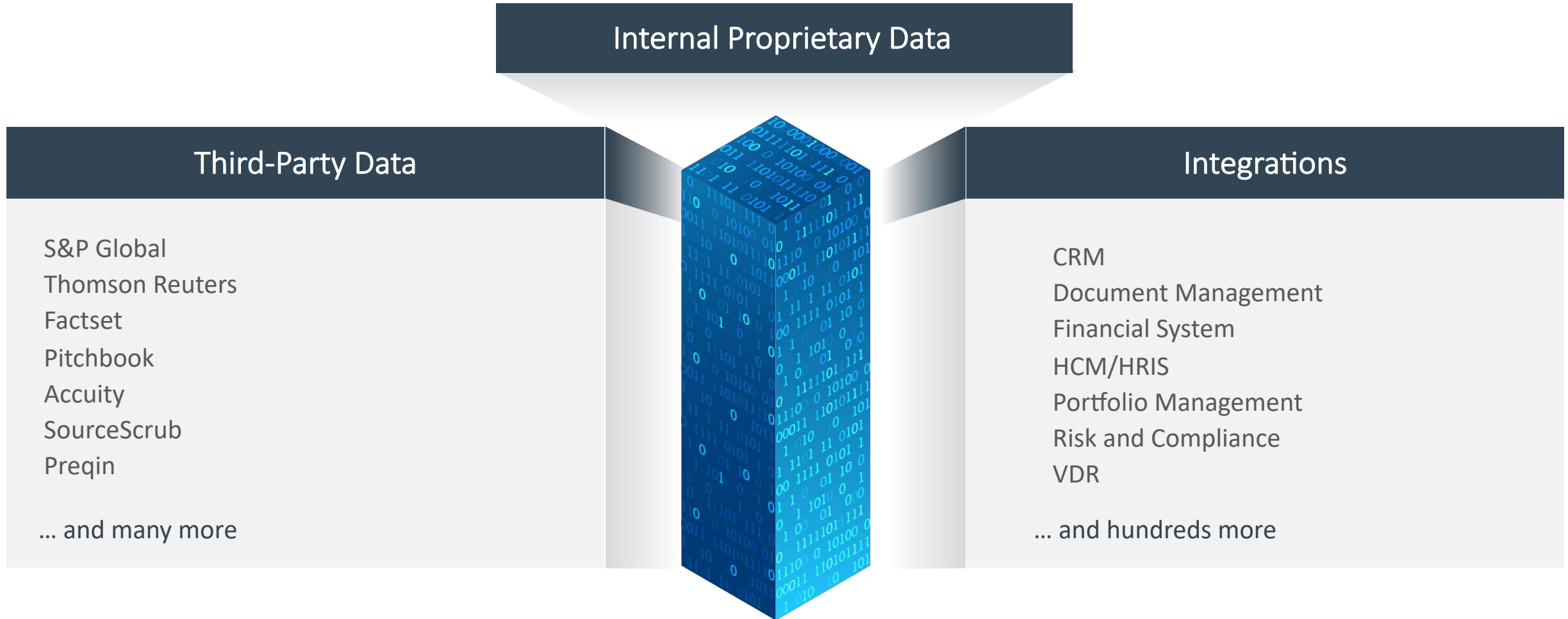
- In-app reporting service built on data cubes
- Modern and powerful tool with comprehensive self-service capabilities





Integration Services

Intelligently Combine Proprietary Data and Market Data in One Place



No Other Company is Better Positioned to Drive Digital Transformation

Intapp Integrate: In a Nutshell

Intapp Integrate Portfolio

- 750+ customers
- 300 enterprise customers
- 400+ product use customers
- 6,000+ appliances (total) deployed
- 500M+ rules executed in the previous 12 months

Continued Investment

- Part of our core portfolio
- Release cadence
 - Four releases a year: February, May, August, and November
 - Aligned to Intapp release schedule

The Real-Time Connected Firm Has New Requirements

A large blue circle containing white text.

An enterprise-grade
integration service
that powers
Intapp OnePlace

Cloud Native

Integration middleware that embraces cloud-native principles

Big-Data Support

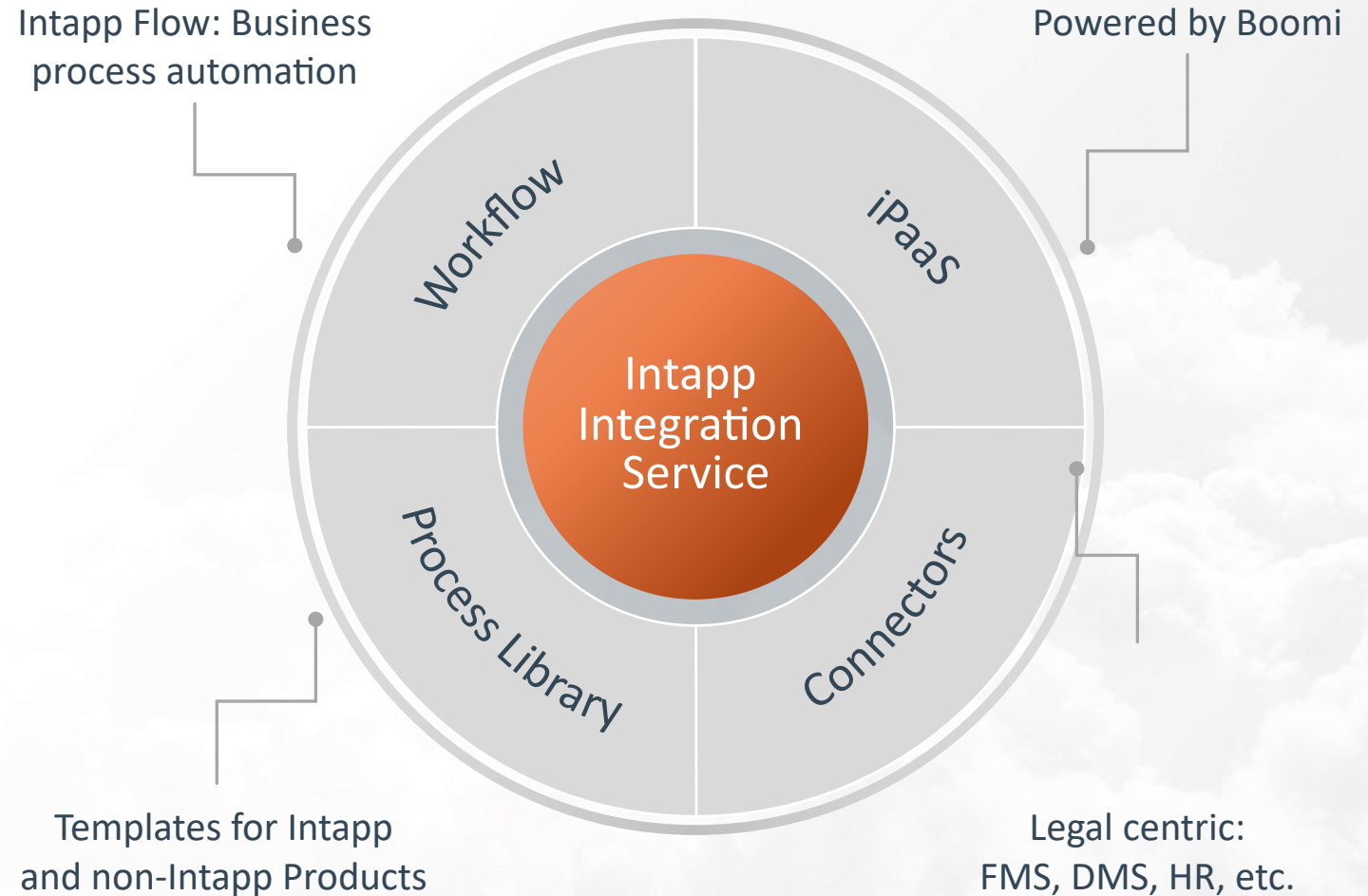
Support exponentially growing data volumes

Real-Time Data Sharing

Enable to access and share data in real time

Intapp Integration Service: Enabling Connected Platform

- Zero-code design
- Hybrid deployment
- Big-data enabled
- Event-stream ready
- Open API Enabled
- Included workflow

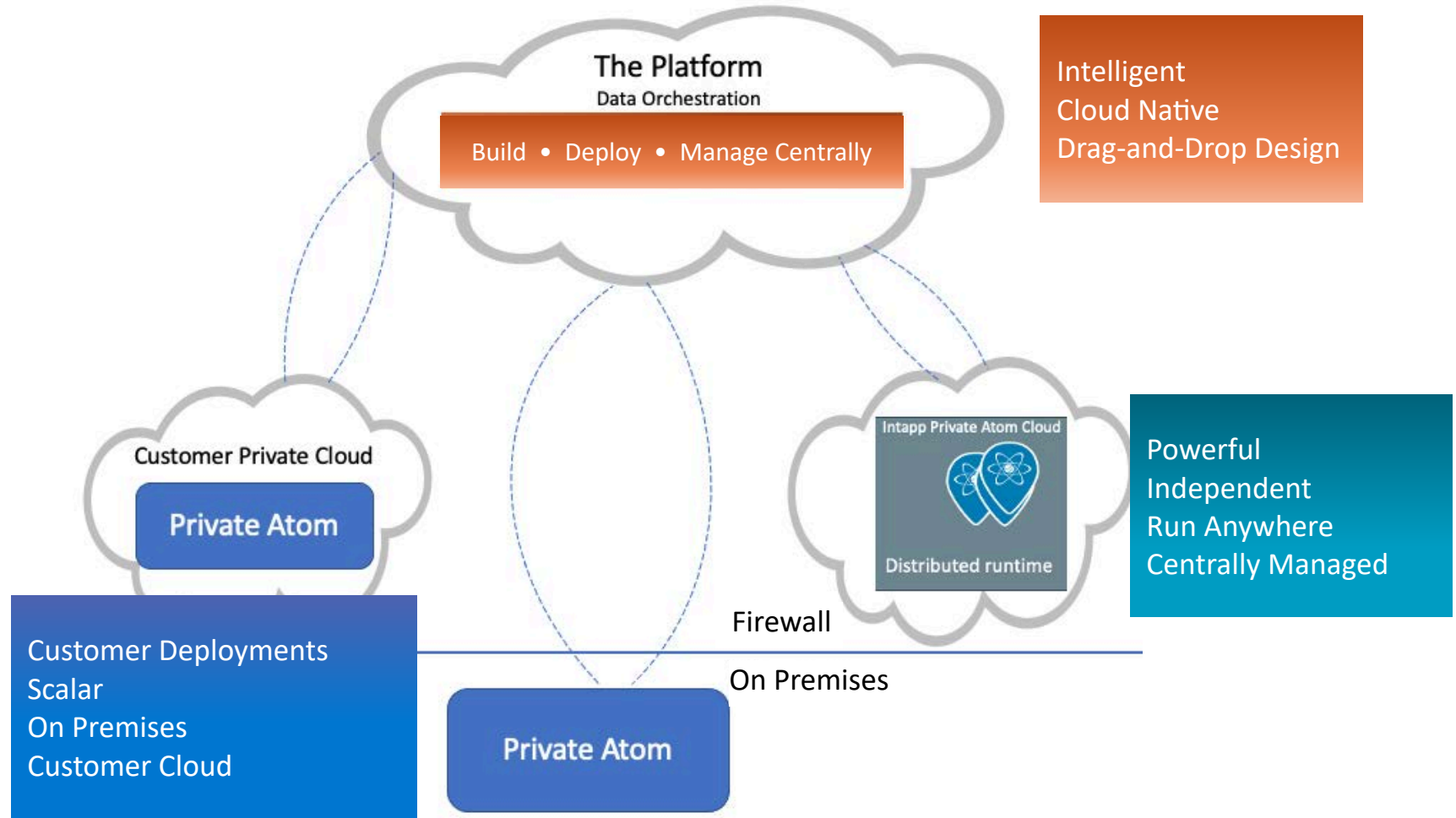


Intapp Integration Deployment

Metadata sits with the platform (Cloud)

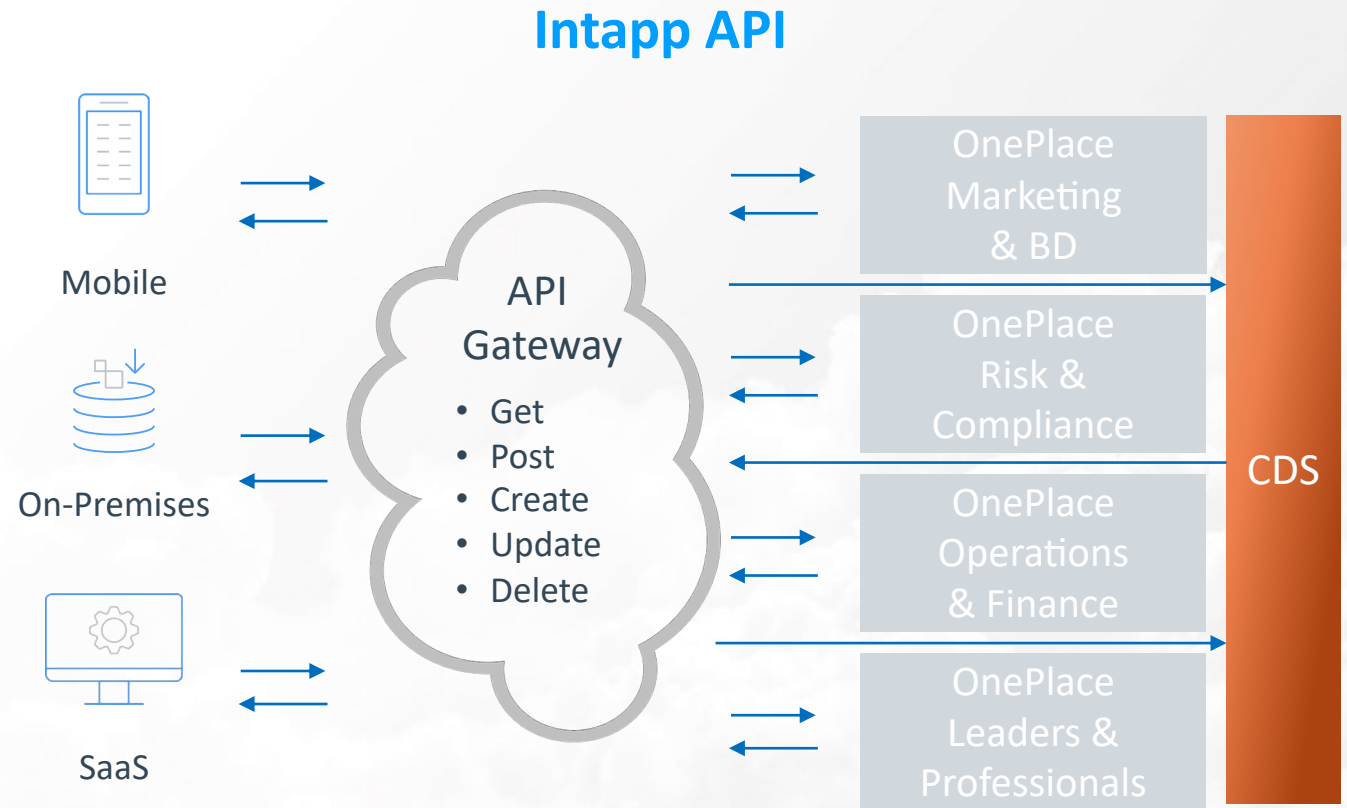
Run-time (Atom) can be deployed independently in one of three locations: Intapp Secure Cloud, customer on-premises, and customer cloud

Customer data — like logs, connection strings, etc. — always sits with Atom

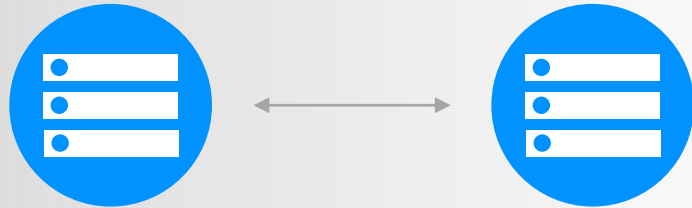


Extend Your Data Across the Firm with Intapp Open API

- Modern REST and JSON standards
- Centrally managed via API gateway
- Swagger-based documentation
- Intapp Open API

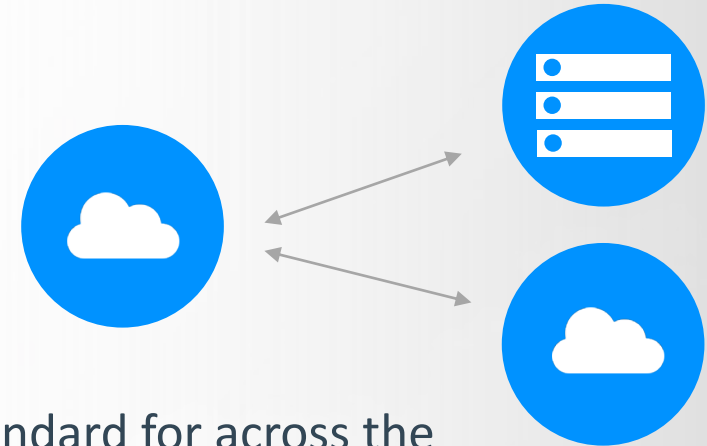


Intapp Integrate and Intapp Integration Service Coexist



- Standard for on-premises deployment
- Continued R&D investment
- Optional upgrade when ready

**Intapp
Integrate**



- Standard for across the Intapp connected platform
- Supports cloud, hybrid, on-premises
- Purpose-built integration processes

**Intapp
Integration Service**

Where We Are Today, and the Road Ahead

	Fall 2020 (November)	Winter 2021 (February)	Spring 2021 (May)	Summer 2021 (August)
Platform AI	AI-Assisted Conflicts	Engagement DNA	Relationship Intelligence	Enhanced Terms Model
Data Services	Common Entity Support Client Matter Security	Data Flow Controls Purge and Delete Controls	Expanded Definition: Accounts Updated Data Model	Expanded Definition: Engagements Unified Platform APIs
	Advanced Search Screen against all providers	Change Tracking Show users what changed	Entry Form Search and Populate Faster data entry	Extend Support to Long Tail Evaluate a partner-driven framework
	Unified Data Repository	Client-Engagement Analytics Finance & Risk Metadata Management	Client-Engagement Analytics Finance Risk and CRM Automated Data Reconciliation	Full Client-Engagement Analytics CRM, Risk, Finance, Operational data
Integration Services	Broader GA Availability IDM Integration	White Labelling Support CDS Integration & Publish to library	Intapp Process library Processes for Intapp Products Connector Packs (3E, NetDocs)	Intapp Process library Processes for non- Intapp Products Streamline Implementations Extensions / Library Support
	Swagger UI for Integrate REST API	Master Backup Password Enforcement	UI/UX - Search by Action Type	Upgrade to Ubuntu 20.04 LTS
	Intapp Cloud Connector Enhancement (DAS)	Support for Oauth2.0 for the HTTP Datasource	Improve Event Scheduling	Security Updates



Platform AI

Bringing AI to the Connected Firm



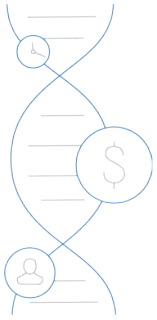
Intapp Platform AI

Zero-Entry Capture

Machine Learning

Natural Language Processing

Data Science

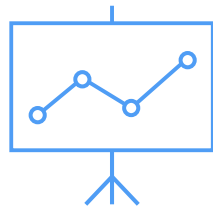


Intapp Engagement DNA

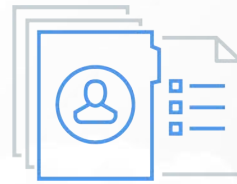
A methodology for finding similar engagements based on shared characteristics for predictive intelligence based on historical data



Leverage
Disparate Datasets



Clean
and Normalize



Profile and
Derive Attributes



Cluster
Similar Engagements



Analyze
and Predict

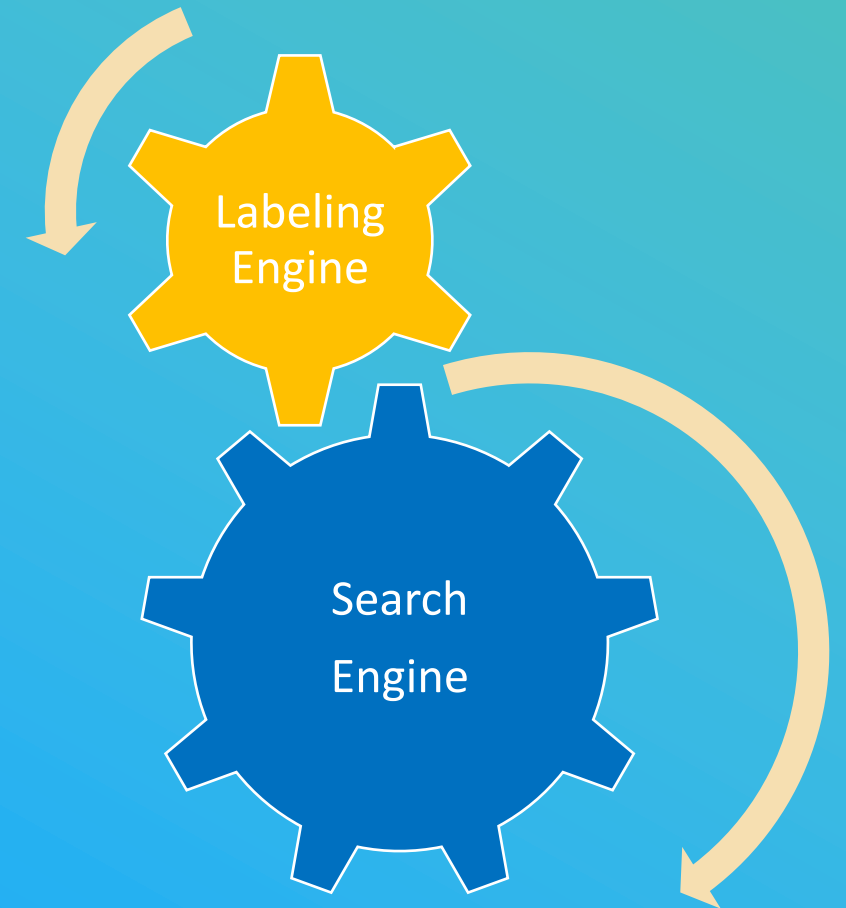
Engagement DNA: How It Works

Labeling Engine

Use semisupervised learning and active learning approaches to assign labels to timecard narratives based on a given taxonomy and code set

Search Engine

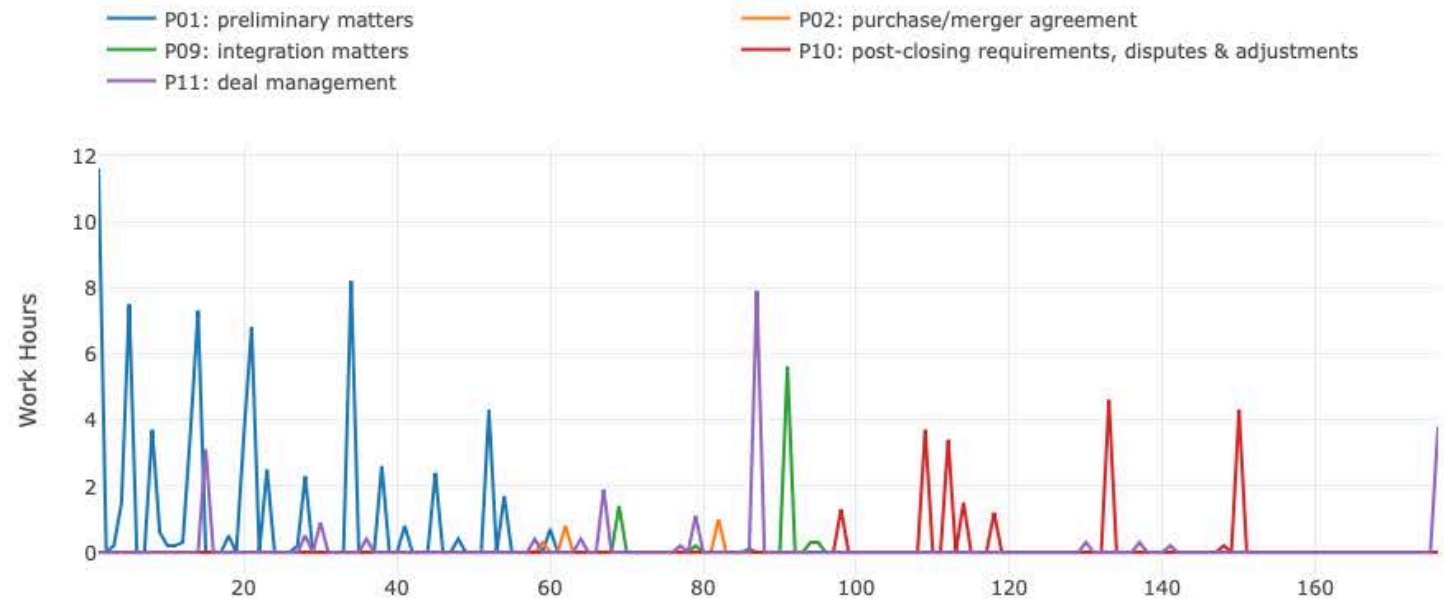
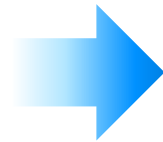
Use a set of attributes (including labels generated by the labeling engine) to retrieve engagements that are relevant to a given information request or reference engagement



Engagement Similarity

Representing the work breakdown by type as an input to the engagement similarity search

Date	WorkHrs	Narrative
2018-09-01	0.4	reviewed doc for water melon llc.
2018-09-04	1.3	revised documents with the w&m lawyer
2018-09-06	0.7	conducted searches regarding litigation history
2018-09-14	0.7	revised documents for wmh llc
2018-09-27	0.4	attended management presentation
2018-10-05	0.8	prepapred questionnaires
2018-10-10	0.3	discussed issues
2018-10-10	0.5	drafted discussion minutes
2018-10-11	1.3	prepared e-mail regarding integration matters
2018-10-12	4.2	drafted memo regarding the transaction
2018-10-12	0.4	presented latest results
2018-10-16	0.2	discussed action plan
2018-10-21	3.7	sent emails to the attorneys and the w&m team
2018-10-28	1.4	discussed issues regarding transfers within th...



Engagement DNA for Budgeting

Phase/task and activity effort distributions are useful to identify similar engagements

Centerpoint Energy Government Relations Regulatory

TEMPLATES **ANALYZE HISTORICAL MATTERS**

Base Matters

Matter	Effort (h)	Duration (wks)	Leverage	Phase Effort by Type	Activity Effort by Type	Fees @ Current Standard
Government Relations Regulatory (710091) NestlÃ© (060007)	371.7	52	<div style="width: 100%; height: 10px; background-color: #4CAF50;"></div>	<div style="width: 100%; height: 10px; background-color: #9C27B0;"></div>	<div style="width: 100%; height: 10px; background-color: #00BCD4;"></div>	\$190,518

Similar Matters


PRACTICE:

EFFORT: to hours

DURATION: to weeks

Matter	Grade	Effort (h)	Duration (wks)	Leverage	Phase Effort by Type	Activity Effort by Type	Fees @ Current Standard
<input type="checkbox"/> Real Estate Debt Financing (710085) BP (060003)	A	831.6	36	<div style="width: 100%; height: 10px; background-color: #4CAF50;"></div>	<div style="width: 100%; height: 10px; background-color: #9C27B0;"></div>	<div style="width: 100%; height: 10px; background-color: #00BCD4;"></div>	\$411,275
<input type="checkbox"/> Social Infrastructure Advisory (710070) HSBC Holdings (060004)	A	1,028.3	49.9	<div style="width: 100%; height: 10px; background-color: #4CAF50;"></div>	<div style="width: 100%; height: 10px; background-color: #9C27B0;"></div>	<div style="width: 100%; height: 10px; background-color: #00BCD4;"></div>	\$528,904
<input type="checkbox"/> Social Infrastructure Advisory (710064) BP (060003)	A	703	46.6	<div style="width: 100%; height: 10px; background-color: #4CAF50;"></div>	<div style="width: 100%; height: 10px; background-color: #9C27B0;"></div>	<div style="width: 100%; height: 10px; background-color: #00BCD4;"></div>	\$370,884
<input type="checkbox"/> Real Estate Debt Financing (710071)				<div style="width: 100%; height: 10px; background-color: #4CAF50;"></div>	<div style="width: 100%; height: 10px; background-color: #9C27B0;"></div>	<div style="width: 100%; height: 10px; background-color: #00BCD4;"></div>	\$190,518

Engagement DNA for Experience Search


Work

Windstream Holdings, Inc. Acquisition

Work Profile

▼ WORK INFORMATION

Experience Name
 Windstream Holdings, Inc. Acquisition of Fusion Telecommunications Cloud Services Business

Short Description
 Advised Windstream Holdings, Inc. in the acquisition of its cloud and business serv

▼ EXPERIENCE CLASSIFICATIONS

Tags

- Acquisition & Leveraged Finance
- Chambers Matter Hourly
- Mergers & Acquisitions Preferred Stock
- Stock Purchase

Practices

Corporate

Relationship Intelligence

Historical Data

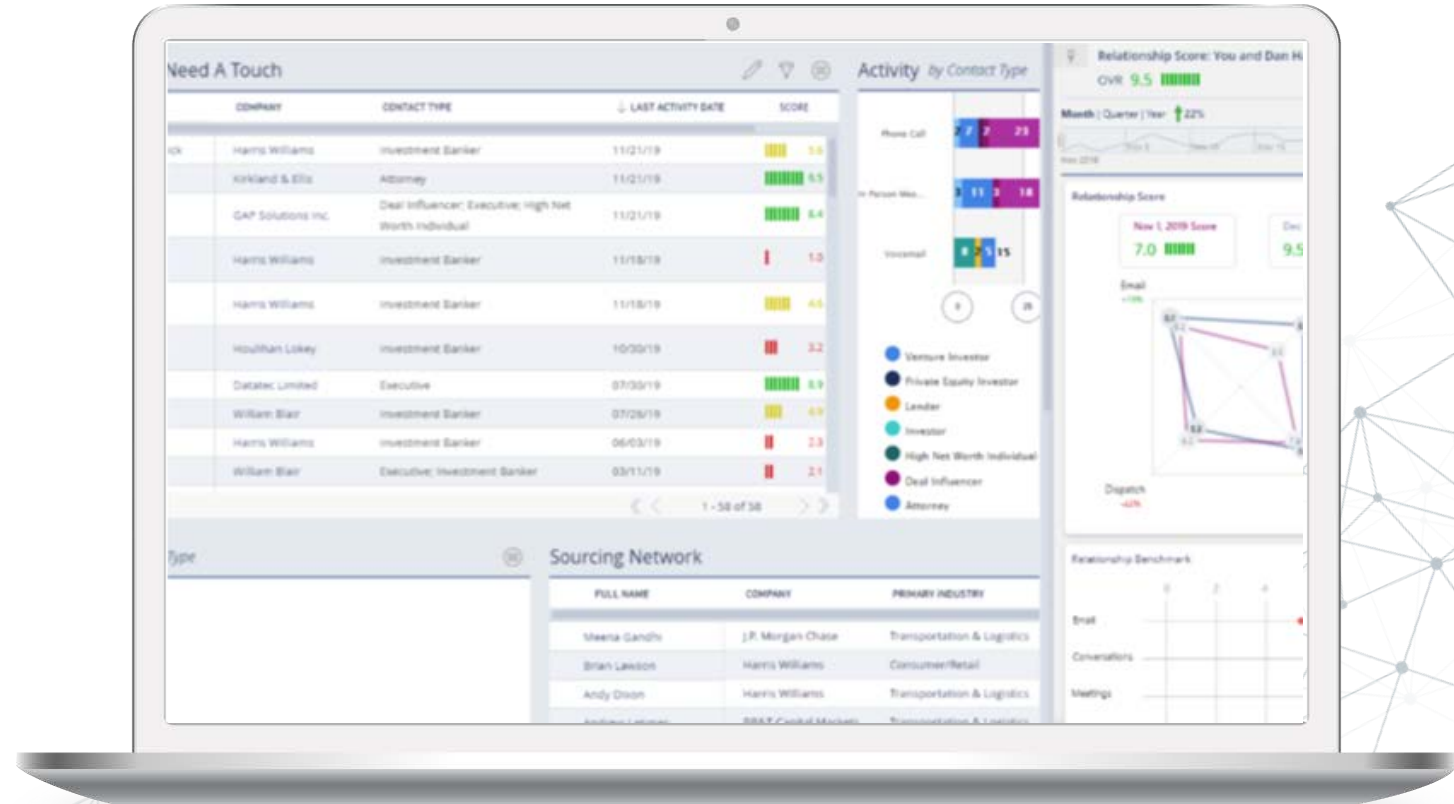
Score aging, trend analysis

Visualizations

Historical trends, snapshots, Sankey charts

Configurations

Score weighting, sync settings, filters






Relationship Insights

Quantify Relationships to Drive Business Outcomes

Calculated with configurable parameters

- Emails
- Meetings
- Phone Calls
- Contact Data



-  Relationship strength
-  Who knows whom
-  Firms and contacts



Leverage Strong Relationships

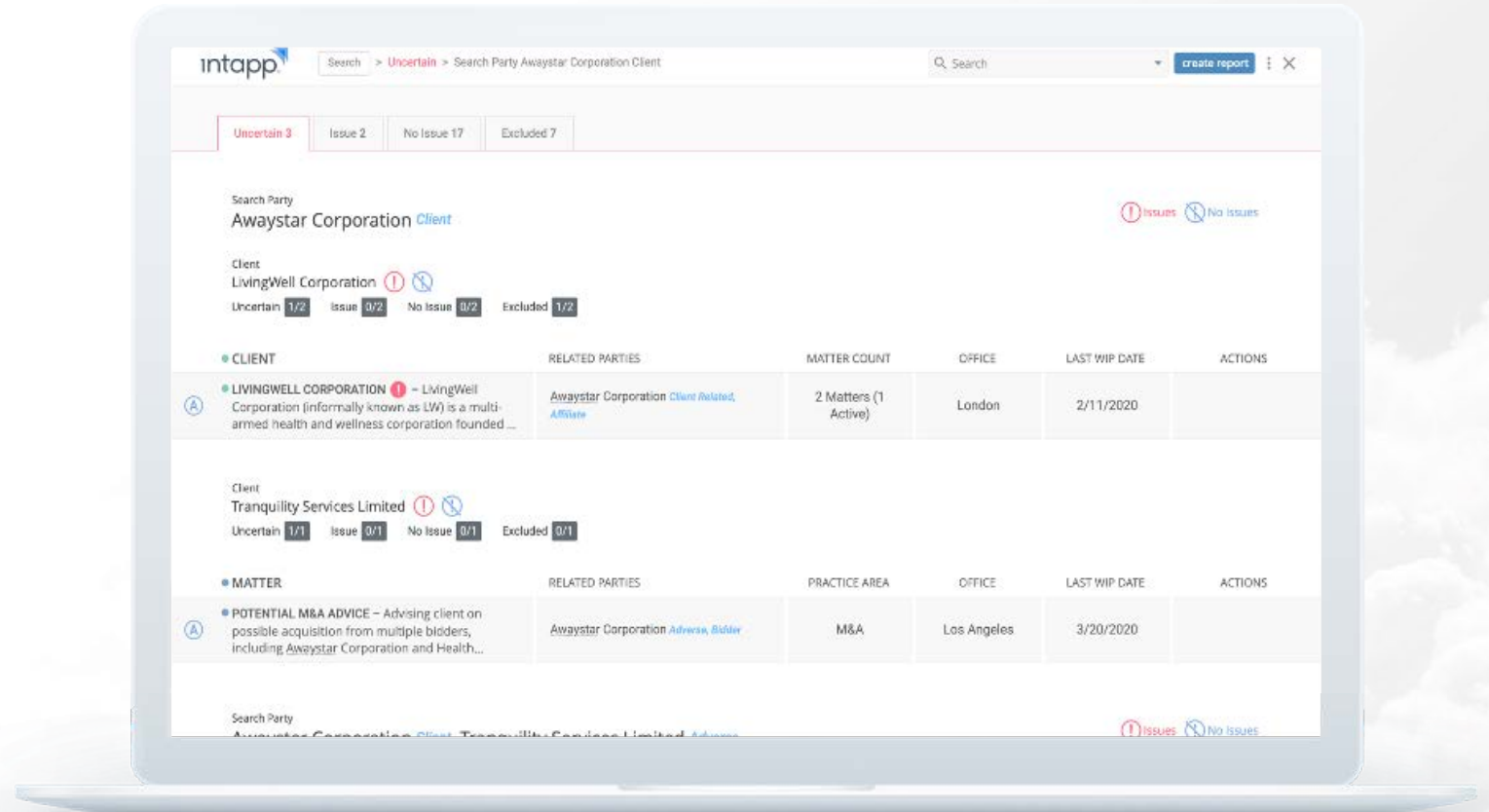


Prevent Decay of Key Relationships

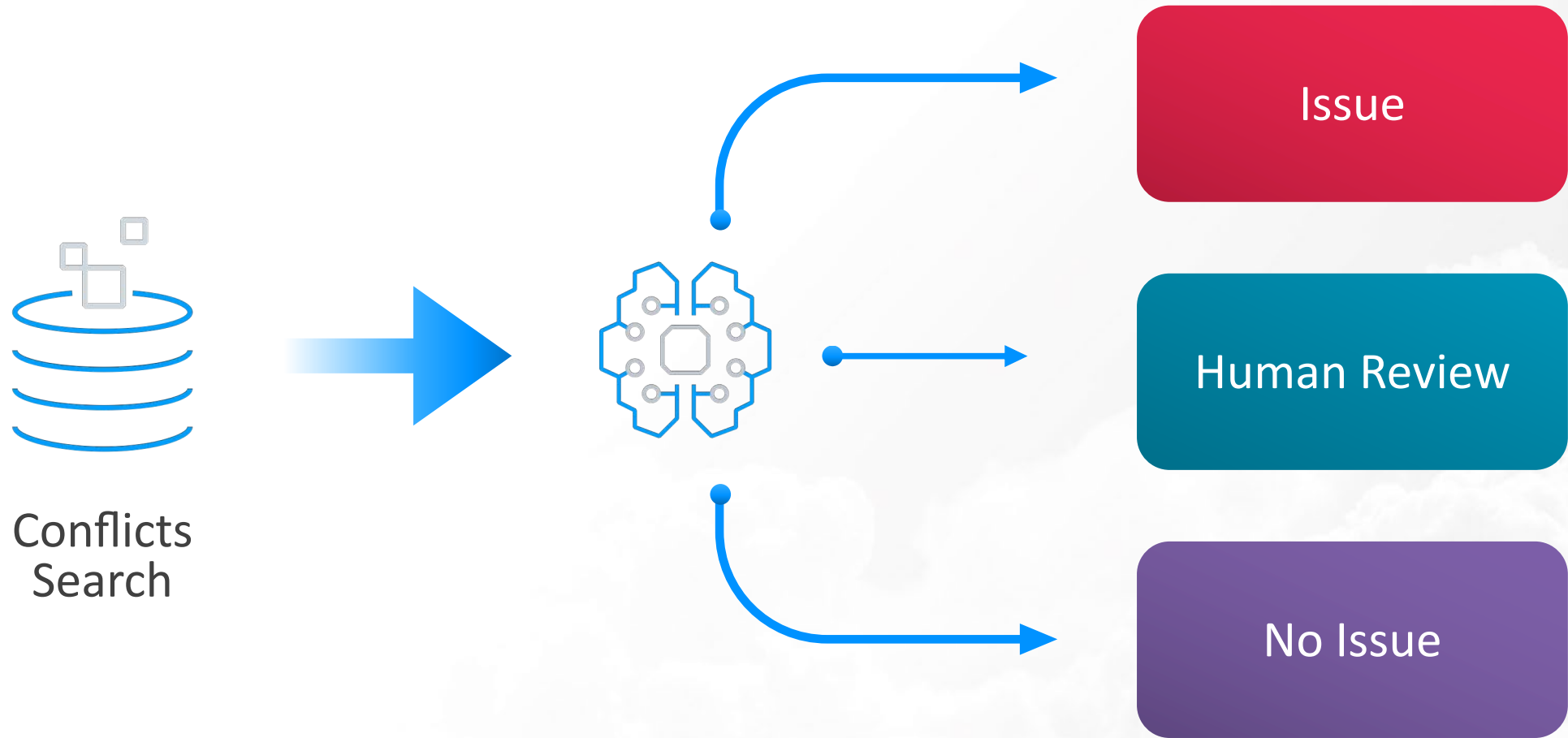
Intapp Conflicts AI: Assisted Clearance

Faster, More Accurate Clearance

- Learns from past decisions and human behavior
- Prioritizes results to allow analysts to focus on items that need further review
- Highlights most relevant results
- Groups results to simplify review
- Deprioritizes low-impact and noise results



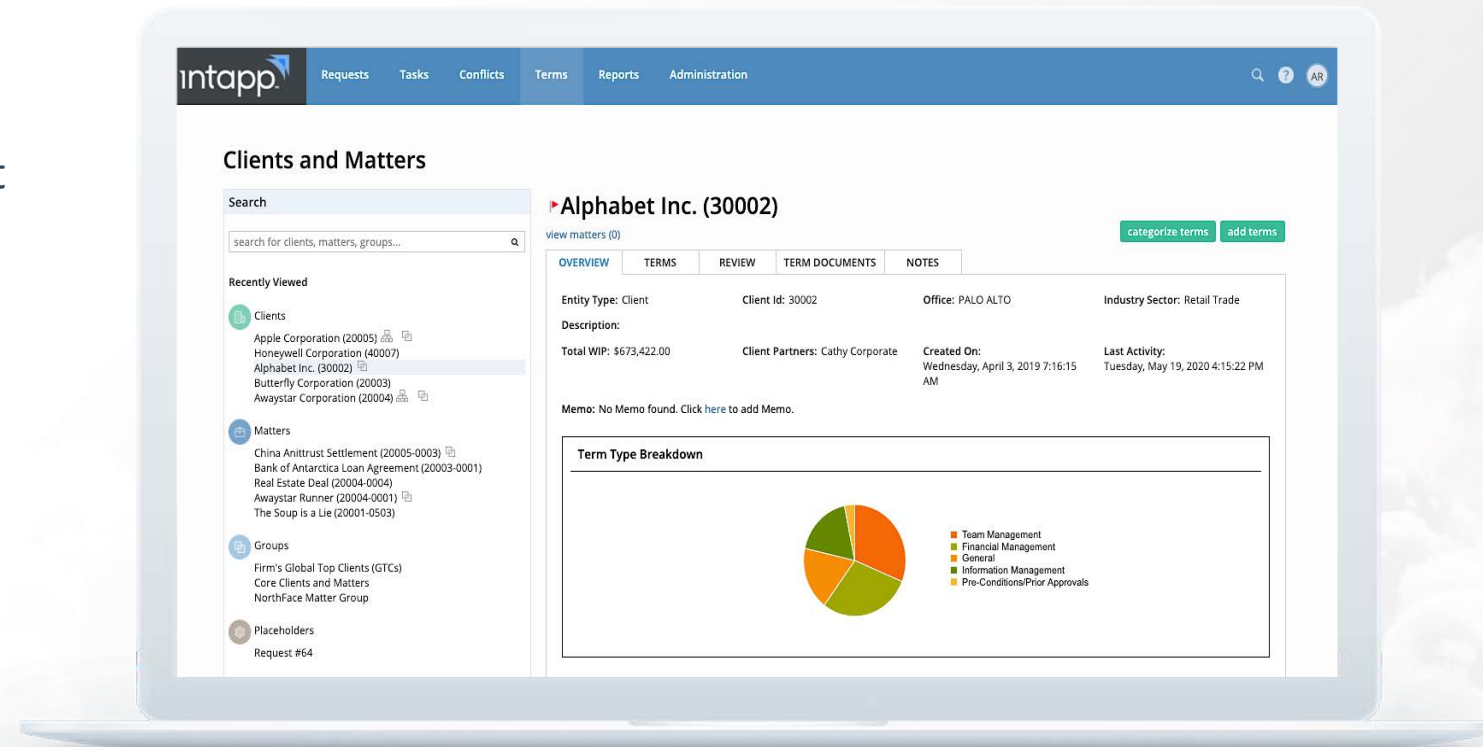
How It Works



Intapp Terms: Client Commitment Management

AI-Accelerated Identification of Client Commitments

- Natural language processing extracts relevant commitments
- AI is trained by user-match reinforcement
- Rules engine sends alerts when important or required information is missing
- Version-change management detects and highlights differences between documents



Contact Data Quality



✓ Harini Sridharan <Harini.Sridharan@intapp.com>

To: José Lazares; Dan Harsell; John Schneider; Pam Smith

You replied to this message.

Jose, Dan, John, Pam: Our Fall 2019 release announcement is ready for your final review. Please see the document in the document itself or via an email to me? [Here is the link.](#)

Please let me know if you have any questions.

Thanks!
Harini

Harini Sridharan
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note

Enabling the Connected Firm



**Data at Your Fingertips
Enhanced Insights
Improved Data Quality
Interoperability**

Next Technical Briefing – January 27

Save the Date –
January 27, 2021

Developing &
Implementing your
Cloud Strategy

- Developing your Cloud Strategy
 - Intapp's Hybrid Cloud Solution
 - Migrating to the Cloud - What will it take
 - What can your firm do now? How do you get started?
 - How to bring over your legacy systems
- Cloud migration process and Consulting solutions
- Client Service Implementation
- Cloud Migration Panel Discussion