

Implement a modern client relationship management [CRM] solution to enhance client relations and accelerate business development.

Adopt a next-generation CRM to enhance marketing productivity, business development, and improve lawyer satisfaction:

- Improve target marketing outreach to increase team productivity, refine segmentation, and enhance engagement and reporting.
- Create a centralized experience management repository to support proposals, requests for proposal [RFPs], and client acquisition.
- Leverage internal relationship data and marketing intelligence to identify new business and cross-sale opportunities.
- Achieve a complete 360° view of client profiles and activity.
- Apply AI to automate workflows and surface actionable insights.

Why Epiq Legal Solutions

Experience the advantage of solutions from a partner specializing in legal.

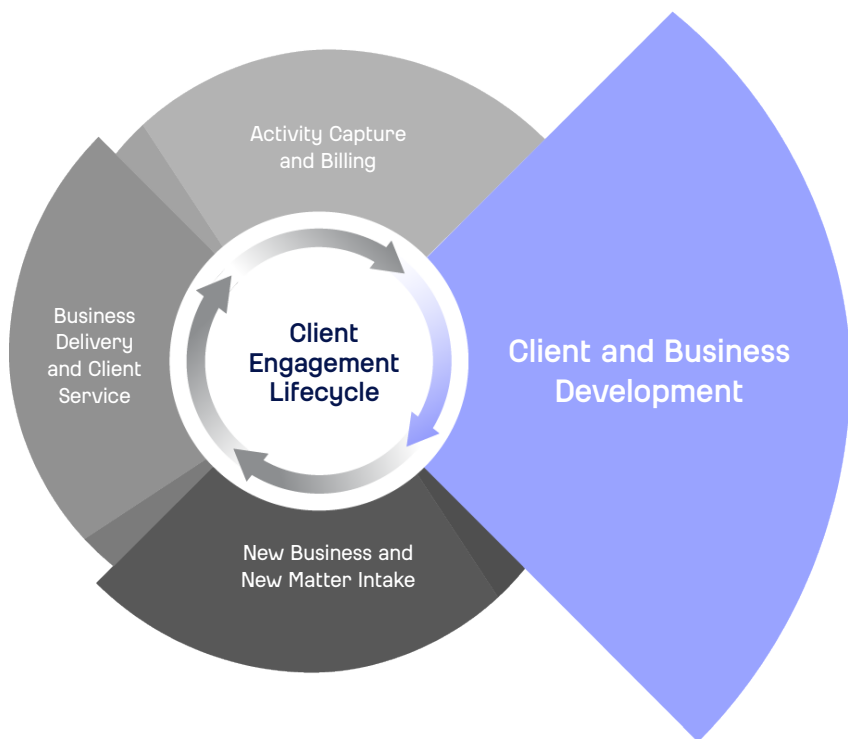
Drive decisions with AI solutions that combine people, process, technology, and data.



Over

1000

successful Intapp projects executed



Intapp DealCloud

Enhance firm business development with a modern, effective CRM.

Comprehensive Consulting and Support for Intapp DealCloud Software Projects

Assessment

Review current CRM and business development processes to identify gaps and define improvements.

Solution Design and Adoption Planning

Create plans that align with firm goals, user needs, system requirements, and timeline.

Feature and Module Enablement

Configure priority features such as relationship and market intelligence, analytics, and reporting.

Change Management, Testing, and Training

Prepare users through communications and readiness activities to support consistent adoption.

Administrator Enablement and Managed Services

Provide training, configuration support, and ongoing managed services to ensure continued stability and growth.

Post-Deployment Enhancements

Extend platform capabilities with new modules, feature improvements, updated reporting, expanded integrations, and expanded user adoption support.

Differentiators

- Platform specialists who developed the blueprints, training, and certification materials used by Intapp today.
- Our cross-functional team includes former Intapp product managers, law firm operations leaders, technology, business process, and subject matter experts.
- Extensive knowledge of Intapp software, product best practices, system and data integration requirements, and change management approaches.
- Ongoing managed service support for feature adoption, administrator training, and report creation after go-live.