

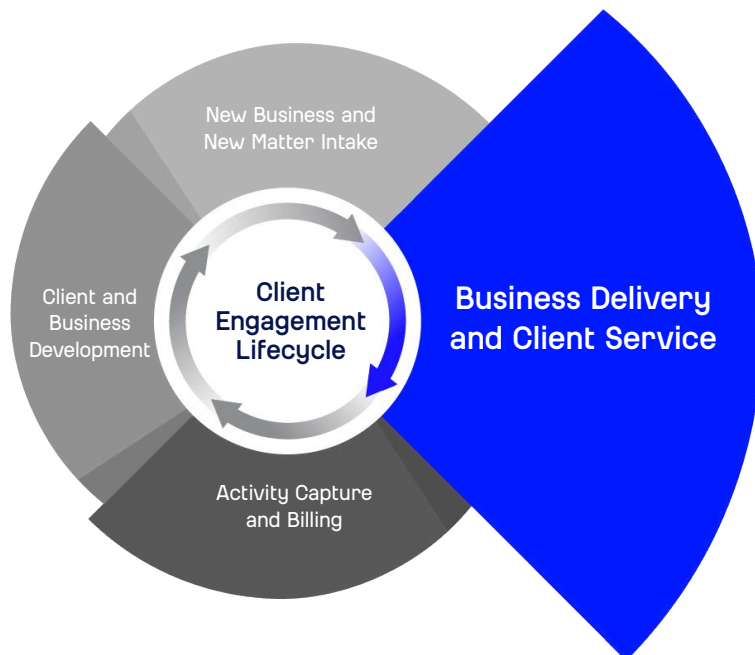
Adopt purpose-built software to manage outside counsel guidelines [OCGs] from intake through billing.

- Accelerate review of OCGs during business intake.
- Centralize client requirements and standardize review and exceptions.
- Identify and manage exceptions to firm policy and client guidelines.
- Enable quick searching and deeper analysis of compliance requirements using existing business intelligence tools.
- Apply accepted terms across matter execution and billing workflows, with related information security controls.
- Incorporate billing requirements directly into time capture software to prevent billing rejections and support faster payment and higher realization.
- Work with experienced advisors on terms management approaches and best practices.
- Improve client satisfaction while reducing operational risk.

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.



Intapp Terms

Capture, communicate, and ensure compliance with client OCGs.

Intapp Collaboration

Add structure and governance to SharePoint and Microsoft Teams.

Intapp Walls

Comply with client and professional confidentiality requirements.
Enable safe and secure AI adoption.

Intapp Terms Implementation and Legacy OCG Data Import Projects

Assess existing OCG data footprint and related risk management practices.

Implement Intapp Terms to enable modern, scalable OCG management.

Remediate historical OCG data by collecting, storing, and categorizing existing terms.

Develop tailored reporting and notification solutions to support ongoing compliance.

Integrate OCG driven compliance controls into downstream systems.

Differentiators

- Process and import legacy OCG documentation using a predefined taxonomy of 99 standardized terms across five obligation categories.
- Integrated expertise spanning contracts analytics, invoice management, and client guideline practices, supported by enterprise delivery experience across the Intapp suite.
- Proven experience embedding OCG rules across business intake, information security, and time entry.
- Extensive knowledge of Intapp solutions, integration, and change management best practices.
- Expertise across the Intapp platform, integrating adjacent firm needs, including conflicts management and the billing lifecycle.
- Ongoing managed service support for terms management workflows, data taxonomy, and training after go-live.