

# Align risk and document management systems to operate as one firm.

Stabilize post combination operations on Day One by aligning document management systems [DMS] and enforcing ethical walls. Protect client confidentiality, preserve firm knowledge, and scale systems ready for AI.

- Strengthen document management and access controls while improving data governance, knowledge sharing, and security.
- Surface risks early before finalizing strategy and operating model decisions.
- Guide pre-combination assessment, integration planning, and post-combination execution.
- Coordinate data, experience, knowledge, and intranet platforms to reduce disruption.
- Preserve knowledge and provide access to guidance and work product through shared systems, governance, and aligned controls.

### 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.

### Our Partners



### Differentiators

- Bring together Intapp risk expertise and leading DMS advisory, migration, and implementation.
- Combine law firm specific expertise with implementation capabilities and an independent planning perspective across complex integrations.
- Extend the roadmap beyond core systems into data, experience, knowledge, and intranet to support long term integration and value creation.

**Start with a clear  
combination strategy.**

**Visit the Website**

Key Features

Integration, Risk, and System Alignment

Combination Readiness  
and Integration Roadmap

System Discovery and  
Combination Assessment

Data Platform and  
Reporting Alignment

DMS Combination Strategy  
and Execution

Intapp Walls, Conflicts,  
and Time Integration

Conflicts, Risk, and  
Ethical Wall Planning

Records and Information  
Governance Alignment

Client, Matter, User, and  
Security Dependency Planning

Collaboration, Knowledge, and Future Enablement

Experience Management Combinations

Collaboration and Operating Model

Knowledge Strategy

Intranet and Digital Workplace Design

AI Content and Data Readiness

AI Coaching and Literacy



North America

Partner of  
the Year 2025

Customer Success  
Leader 2024