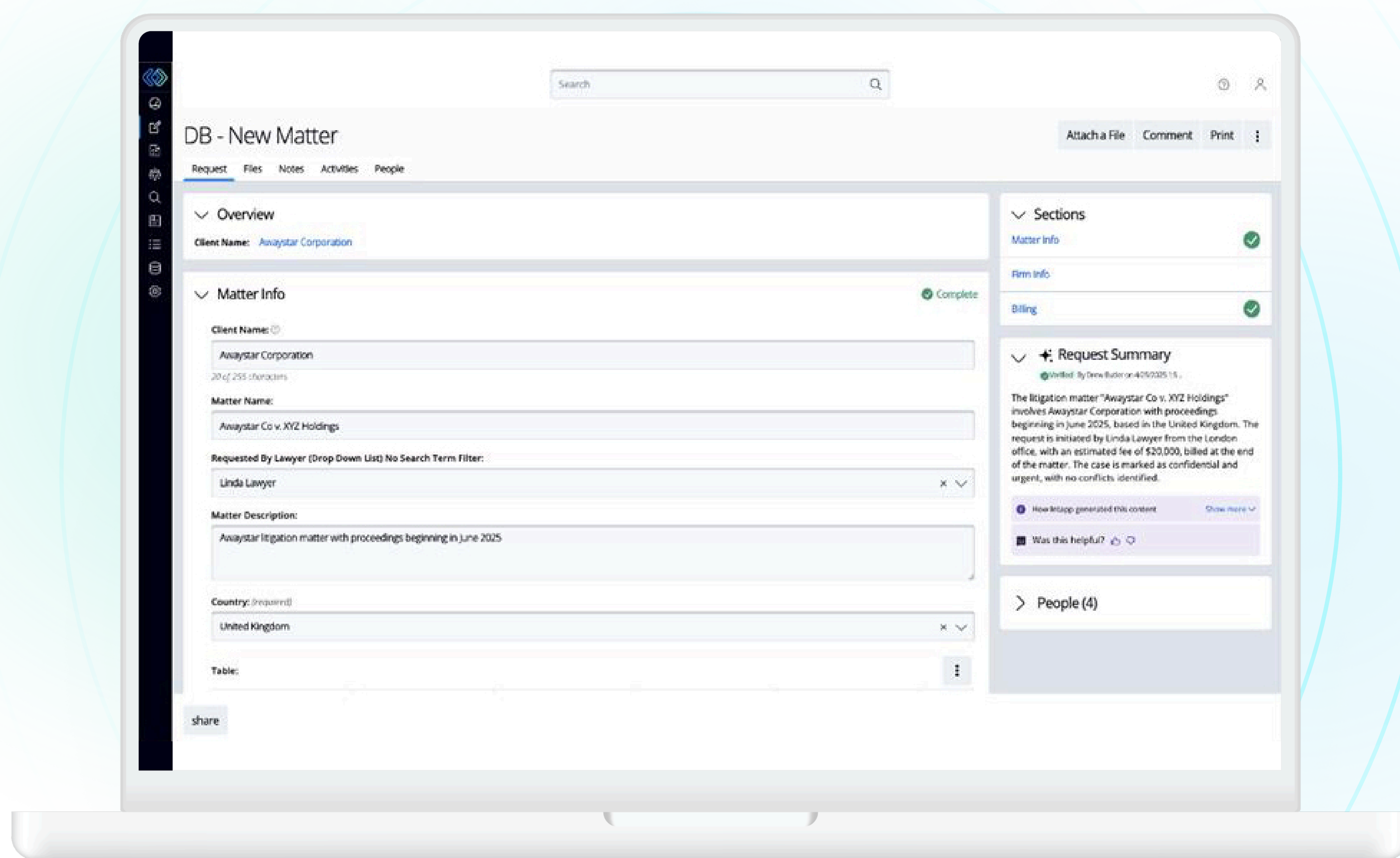


Intapp Intake

Open new business faster and reduce risk as your firm grows

Centrally capture and evaluate critical information to make faster, more informed risk-based decisions with Intapp Intake.



Accelerate due diligence and onboarding



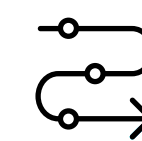
Consistent decision-making

Make informed, data-driven decisions with dynamic workflows, up-to-date data sources, and systematized risk scoring.



Strategic alignment

Get a comprehensive view of overall risk and ensure you're bringing on new business that won't hinder growth in the future.



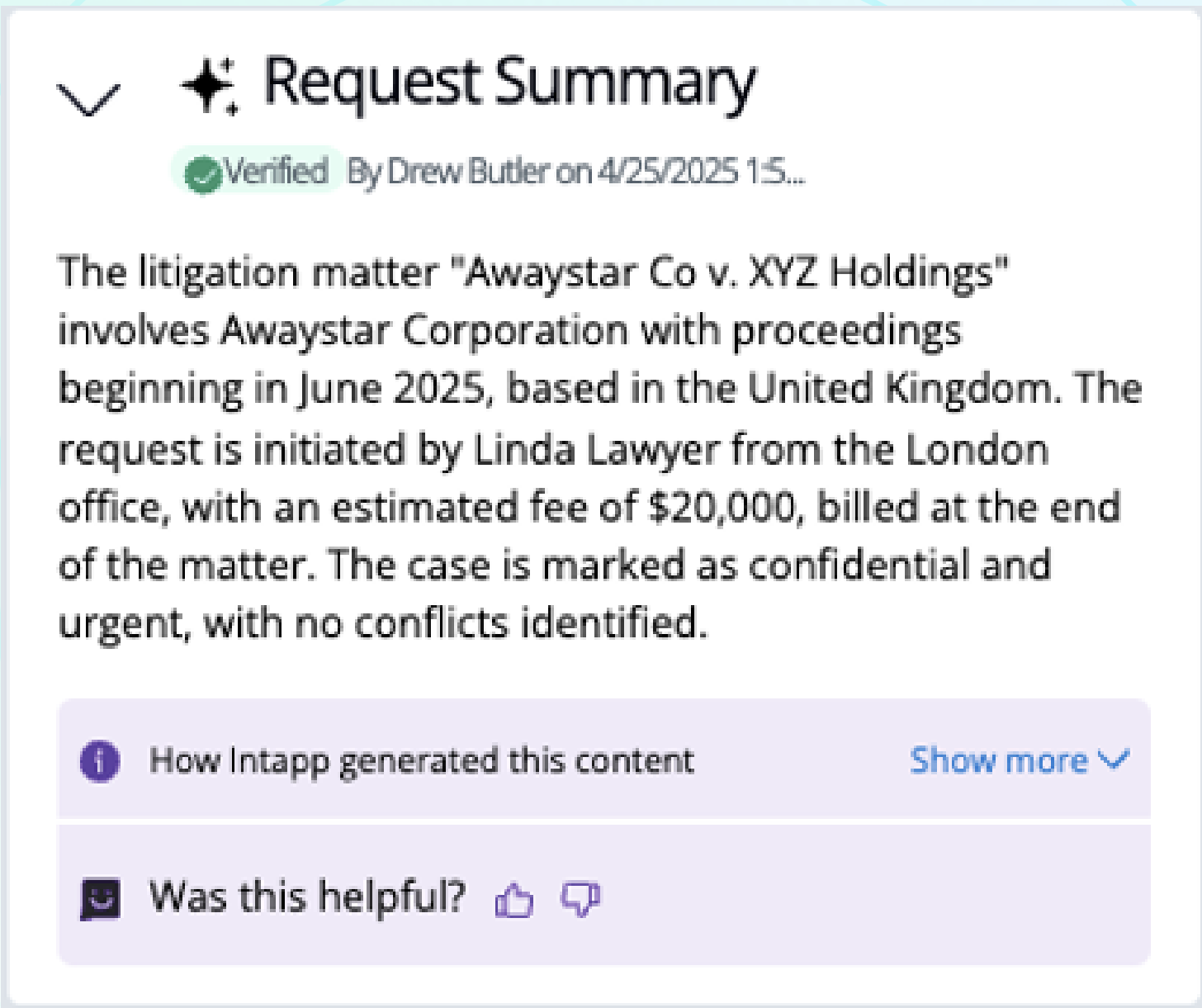
Integrated processes

Efficiently complete due diligence and manage risk with connected, related risk processes and workflows like conflicts checks and terms reviews.

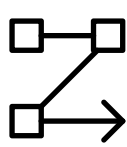
Save time with persona-driven request summaries

With every new business intake form, multiple stakeholders must review the entire form to identify which information is relevant to their assessment. This process is time-consuming and often delays matter openings.

Intapp Intake solves this problem. It sends intake reviewers tailored generative AI summaries of the form that contain only the information relevant to their review – saving approvers significant time and hassle.



Key features of Intapp Intake



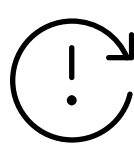
Configurable forms

Create onboarding questionnaires that include the specific questions and language your firm wants.



Risk scoring

Generate risk scores based on key criteria and business rules, then automatically escalate or resolve issues using automated approval routing.



Ongoing monitoring

Automate real-time monitoring and notifications of evolving client or market conditions that may impact risk assessments.



Engagement letter automation

Streamline your onboarding process with templates and auto-generated engagement letters.



Intapp Data

Enrich your new business intake requests and accelerate client and lateral hire onboarding using key firmographic data.

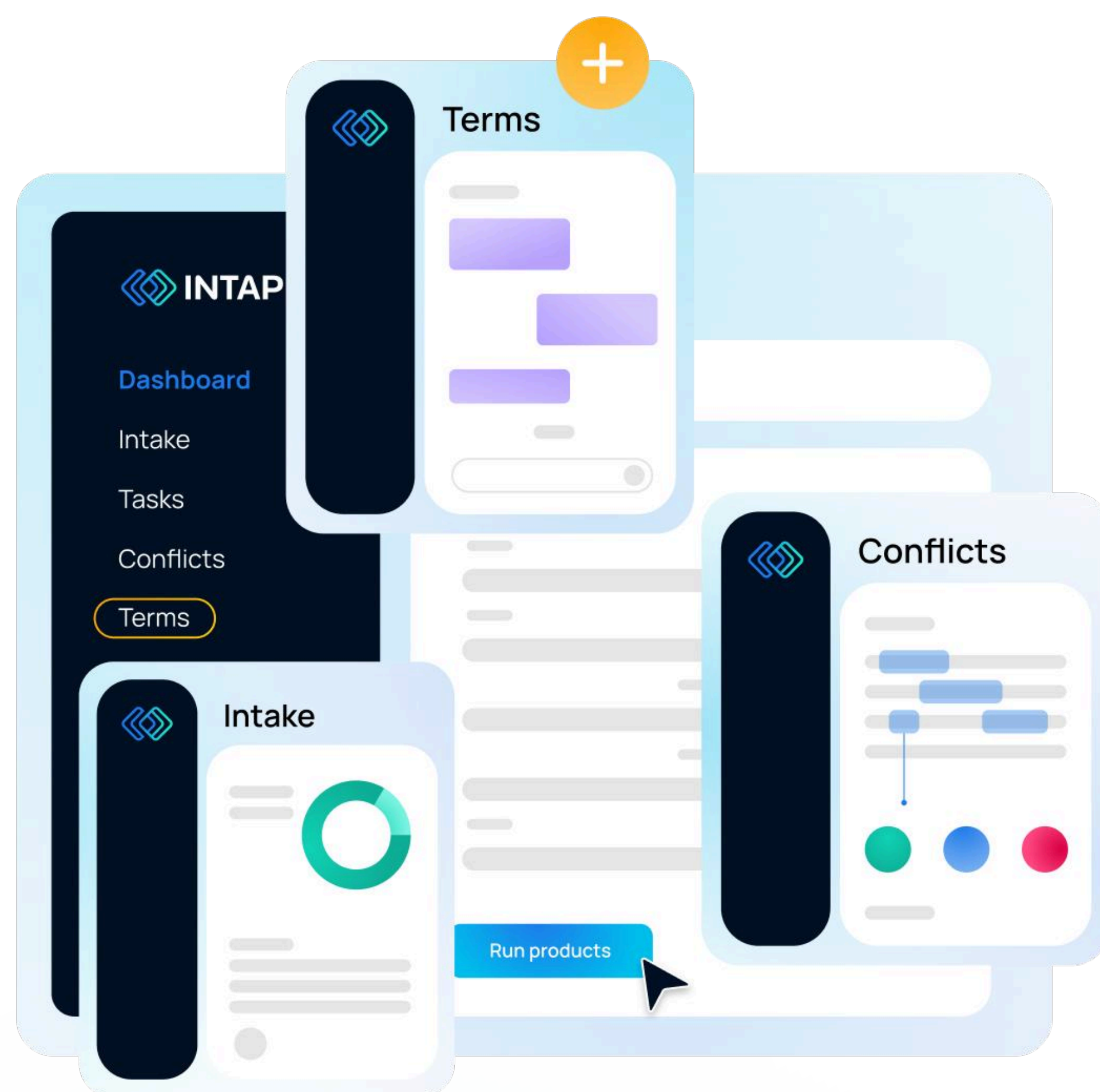


Mobile app

Create new requests, search requests assigned to you, and collaborate in real-time when you're on the go.

Data integrations

Intapp Intake integrates with Intapp Conflicts and Intapp Terms to create a seamless client onboarding and risk assessment experience. Intapp Intake also natively integrates corporate tree, NAICS and SIC industry codes, and other data from trusted third-party sources to help you ensure you're making optimal risk-based decisions.



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