

OnePlace Collaboration & Content

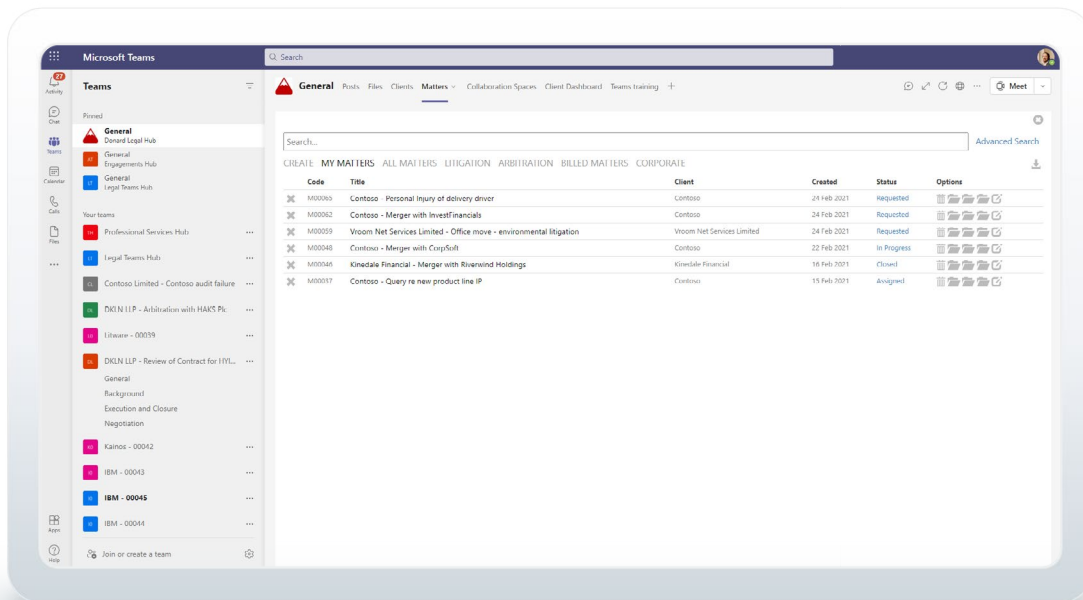
OnePlace Collaboration & Content streamlines collaboration and helps teams work smarter, combining the power of Intapp OnePlace and Microsoft 365.

Good teamwork drives better client outcomes. Help your professionals work better together by implementing purpose-built workspaces that bring everyone into the same virtual headquarters.

OnePlace Collaboration & Content helps win business and deliver successful outcomes by powering client-centered collaboration using the combined power of Intapp OnePlace and Microsoft 365. Boost firmwide team collaboration with intelligent workspaces that make the most

of Microsoft Teams, orchestrate document management across all your content sources for full lifecycle visibility and collaboration, and transform the client experience with secure, personalized external collaboration.

Learn why more than 250 firms – including prominent legal, accounting, and consulting firms – leverage OnePlace Collaboration & Content to streamline collaboration, boost client satisfaction, and maximize their Microsoft 365 investment.



Benefits



Streamline Collaboration

OnePlace Collaboration & Content turns Microsoft Teams and Outlook into your virtual headquarters. Fee earners easily collaborate in a unified environment while accessing relevant content from across various firm systems. Boost efficiency by automating workspace creation with engagement-centric layouts and permission controls, and support lifecycle management from client development through engagement close – all while enforcing compliance through Intapp Walls.



Boost Client Satisfaction

OnePlace Collaboration & Content helps your professionals deliver an exceptional client experience. Enable secure anytime, anywhere client-centric collaboration – both inside and outside your firm – turning Microsoft Teams and SharePoint into secure, client-centered workspaces, creating transparency and effective feedback loops. Drive better decision making through proactive insights from continuously capturing information about engagements that helps your professionals keep clients happy.



Maximize Your Microsoft 365 Investment

OnePlace Collaboration & Content offers a window into every engagement, augmenting Microsoft 365 with relevant information from across your firm. The suite integrates with Power BI, Planner, Flow, and other Microsoft 365 components, and works with document management, practice management, experience management, time recording, and other systems. Link content and folder structures across systems to ensure knowledge capture, and automatically file emails and attachments to SharePoint and other systems to bolster compliance.

Features

- **Engagement-centric workspaces** to provide 360-degree engagement views by accessing in-context content from other firm systems
- **User, workspace, and content governance** to ensure security and information compliance in accordance with firm policies
- **Automatic workspace creation** in Microsoft Teams at intake to save valuable time while streamlining the engagement management process
- **Powerful information policies** through Intapp Walls enables access controls and permissions to support client mandates and compliance requirements, minimizing risk
- **Smart filing and content synchronization** to connect SharePoint, Outlook, and all your file systems to promote knowledge retention
- **Secure external collaboration** workspaces for sharing documents, tasks, status, and other key information to boost client transparency
- **Microsoft 365 integration** – including Power BI, Planner, and Flow – draws data from multiple sources to generate powerful insights
- **Connected firm management**, as part of Intapp OnePlace, connecting your people, processes, and data across the client lifecycle to drive superior outcomes