

DealCloud Collaboration & Content streamlines collaboration and helps financial services professionals work smarter, combining the power of DealCloud and Microsoft 365.

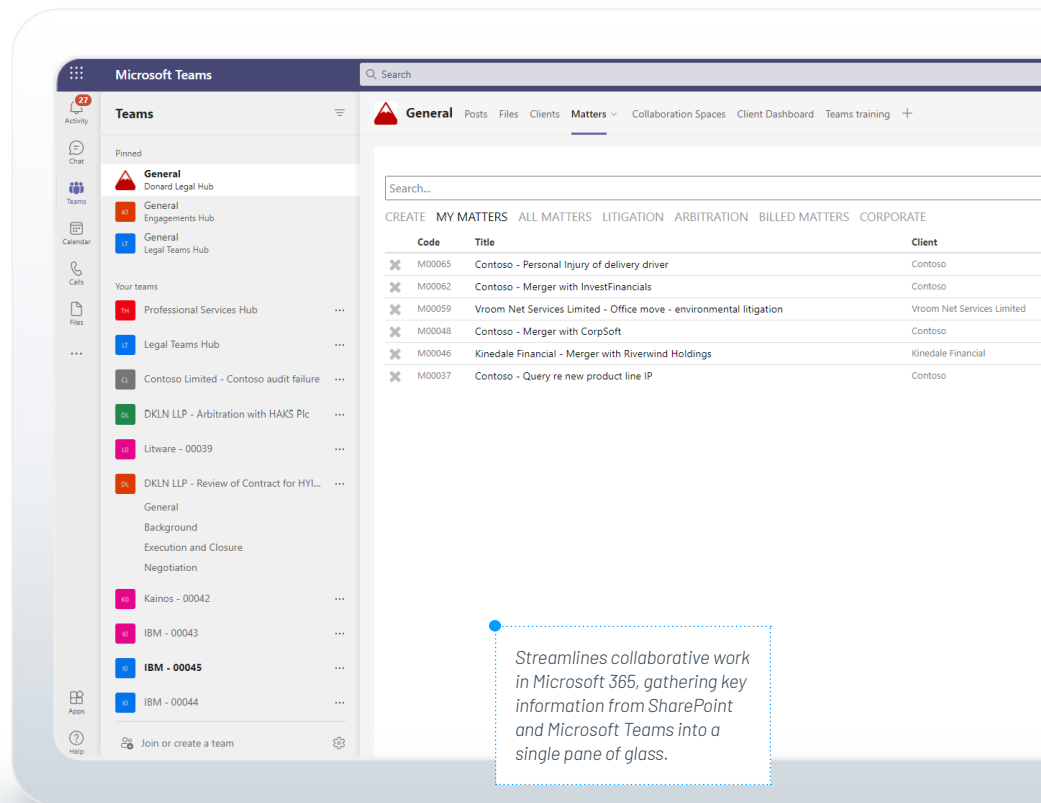
Good teamwork drives better client outcomes. Help your professionals work better together by implementing purpose-built workspaces that bring everyone into the same virtual headquarters.

DealCloud Collaboration & Content helps win business and deliver successful outcomes by powering project-centered collaboration using the combined

power of DealCloud 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.

DealCloud Collaboration & Content Product Overview

- **Intapp Documents:** Deploy deal-centric document management and email filing capabilities built on Microsoft 365.
- **Intapp Workspaces:** Boost firmwide team collaboration with intelligent workspaces that make the most of Microsoft Teams.
- **Intapp Client Collaboration:** Securely work with clients and other parties directly within Microsoft 365, SharePoint, and Microsoft Teams.



Benefits



Accelerate Deal Execution Timeline

DealCloud Collaboration & Content simplifies collaboration, turning Microsoft Teams and Outlook into your virtual headquarters. Deal teams easily collaborate in a single, unified environment while accessing relevant content from across various firm systems. Boost efficiency by automating workspace creation with out-of-the-box, deal-centric layouts and permission controls, and support workspace lifecycle management from sourcing and origination through deal execution.



Augment Institutional Knowledge

DealCloud Collaboration & Content memorializes all the work created for each deal into well-organized workspaces, chats, and folders that users can query and access through DealCloud, SharePoint, DealCloud Workspaces, or Microsoft Outlook. Spend less time accessing valuable information and files from past deals to quickly reapply frameworks on current projects.



Maximize Your Microsoft 365 Investment

DealCloud Collaboration & Content offers a window into every deal, 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, 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

- **Deal-centric workspaces** to provide 360-degree deal 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 channel creation** in Microsoft Teams at intake to save valuable time while streamlining the deal process.
- **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 transparency.
- **Microsoft 365 integration** – including Power BI, Planner, and Flow – draws data from multiple sources to generate powerful insights.
- **Connected firm management** to connect your people, processes, and data across the deal lifecycle to drive superior outcomes.