

The *Foundations for US Conflicts Analysts* training course is a comprehensive program that educates analysts in the recognition, analysis, and resolution of conflicts. The three-day course combines live instruction with hands-on activities designed to provide students with the knowledge and practical experience to jump start their career in conflicts analysis or reinforce their analytical skills and further their professional development. The *Foundations for US Conflicts Analysts* course uses Intapp Conflicts as the search platform. It is available to firms that license Intapp Conflicts and vendors that provide staffing resources at firms that license Intapp Conflicts.

## Who should take this course?

*Foundations for US Conflicts Analysts* is designed for:

- New conflicts analysts who require education on the fundamentals of conflicts analysis
- Individuals, including paralegals, seeking to broaden their knowledge and qualifications for consideration for conflicts analysts roles
- Conflicts analysts who are new to using Intapp Conflicts
- Third-party outsourcing vendors, offering temporary staff that have been trained on Intapp Conflicts according to leading analytical and research practices.

## What will you learn in this course?

Upon completion of this course, you will be able to:

- Understand the content of a conflicts database, including clients | matters | parties, black book entries, and corporate family trees
- Perform conflicts searches using Intapp Conflicts
- Apply business rules and filters to a conflicts search
- Assess and analyze results to identify ethical and business conflicts
- Acquire basic knowledge about analyzing and resolving conflicts
- Master conflicts communiques
- Understand the different regimes governing lateral hires in the US and UK
- Apply lessons learned with scenario-based conflicts analysis and resolution practicums

## Business Value

- Make the most of your investment – unlock additional feature value to increase efficiency and improve performance
- Accelerate time to value – provide a strong conceptual platform to help Conflicts Analysts make an effective contribution with Intapp Conflicts more quickly
- Identify and resolve issues faster – Enable analysts to assess complex conflicts situations and use escalation protocols more effectively

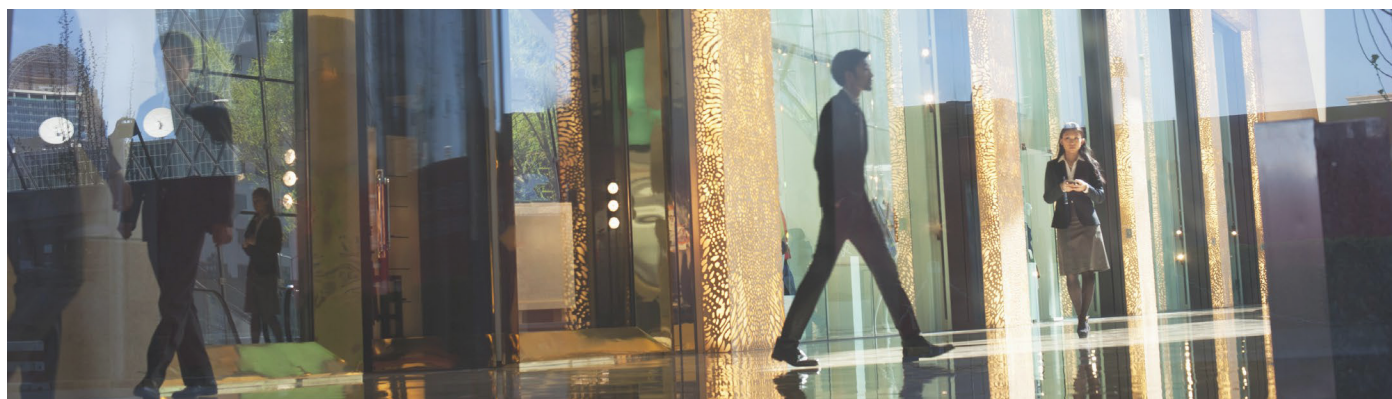


## Topics

Before taking the *Foundations for US Conflicts Analysts* course, students must complete the complimentary *Navigating Intapp Conflicts* course available on demand through Intapp's Customer Community. This course presents the basic functionality of Intapp Conflicts—searching, applying business rules and filters, and interacting with conflicts search results. Experienced Intapp Conflicts users can test out of the *Navigating Intapp Conflicts* course.

## Foundation of Conflicts Analysis

Lecture-Based Instruction	Scenario-Based Practicum
<b>Setting the Stage</b> <ul style="list-style-type: none"><li>• Duties of Loyalty and Confidentiality to the Client</li><li>• Duty of Confidentiality v Attorney Client Privilege</li><li>• Fiduciary Relationships</li><li>• What is an ethical versus business conflict</li></ul> <b>Legal Malpractice</b> <ul style="list-style-type: none"><li>• Disqualification</li><li>• Disgorgement of fees</li><li>• Sanctions</li><li>• Reputation</li><li>• Loss of client</li></ul> <b>Approaching Conflicts Searches</b> <ul style="list-style-type: none"><li>• For what reasons are conflicts searches conducted?</li><li>• What constitutes a successful search strategy?</li><li>• How to communicate results effectively and set up issues   decisions</li></ul>	<b>Litigation, Transactional and IP Subject Matter Scenarios</b> <ul style="list-style-type: none"><li>• Conducting comprehensive searches using Intapp Conflicts</li><li>• Arranging and grouping search results</li><li>• Filtering   Ranking based on party relationships</li><li>• Selecting relevant hits in Interactive Report</li><li>• Communicating results to supervisor in risk function</li></ul>



## Foundation of Conflicts Resolution

<b>Lecture-Based Instruction</b> <b>Setting the Stage</b> <ul style="list-style-type: none"><li>• Regional (domestic), international, and global resolution considerations</li><li>• Know Your Client research</li><li>• Analyzing and resolving potential conflicts</li></ul> <b>Approaching Conflicts Resolution</b> <ul style="list-style-type: none"><li>• Analyzing complex ethical   business conflicts</li><li>• Communicating results to affected lawyers</li></ul>	<b>Scenario-Based Practicum</b> <b>Litigation, Transactional, Bankruptcy, and Trust &amp; Estates Scenarios</b> <ul style="list-style-type: none"><li>• Analyzing complex ethical   business conflicts</li><li>• Honing potential conflicts communicates via the interactive conflicts report</li></ul>
--	--

## Foundation of the Analysis and Resolution of Laterals

<b>Lecture-Based Instruction</b> <b>Setting the Stage</b> <ul style="list-style-type: none"><li>• Expectation that clients are loyal to lawyer</li><li>• Leading practices</li><li>• Approaching searches for lateral candidates</li><li>• Summarizing lateral candidate findings</li><li>• Ethical Screens</li></ul>	<b>Scenario-Based Practicum</b> <b>Lateral Scenarios</b> <ul style="list-style-type: none"><li>• Setting up the Lateral Hire view</li><li>• Role-based searching</li><li>• Bulk searching</li><li>• Dividing searches</li><li>• Cloning searches</li><li>• Information associated with existing information barriers (Walls integration)</li></ul>
--	---

For additional details on this or any other Intapp University courses please contact [customertraining@intapp.com](mailto:customertraining@intapp.com)

