

12 Ways Workflow Automation Delivers ROI for Legal Operations

Learn the proven rewards of automating Legal Ops workflows – and how it can earn Legal Ops a strategic role in the enterprise.



Table of Contents

	Introduction
1	Removing Labor Costs
2	Accelerating Speed-to-Completion
3	Eliminating Human Error
4	Ensuring Compliance
5	Policing Participation
6	Fostering Better and Smarter Collaboration
7	Digitizing Archiving
8	Minimizing the Need for IT and Training
9	Permanently Preserving Expertise
10	Extending the Value of Legacy Systems
11	Positioning Legal Ops as an Enterprise Leader
12	Optimizing Time-to-Value

Introduction: The Most Immediate Benefit

Justin Hectus, Chief Information Officer (CIO) and Chief Information Security Officer (CISO) at Keesal, Young & Logan, is a renowned advocate of technology adoption for the legal profession.

As a two-time winner of the International Legal Technology Association (ILTA) Distinguished Peer Award, he's uniquely qualified to describe its potential for transforming the law. He can also explain why it's crucial for leaders like him to make the right cost/benefit decisions about adopting specific technologies:

“Incredibly easy to implement, inexpensive, and with a high ROI.”

CONNIE BRENTON

Chief of Staff / Director of Legal Operations
NetApp

“When you look at technological disruption, the two major subcategories are: potential for tremendous risk and tremendous opportunity. So we have to embrace the transformation from the standpoint of how to minimize risk while maximizing opportunity.

“You really have to make sure you’re focused on getting the most immediate benefit from the most applicable and proven technologies coupled with the right people and process in tandem with any forward-leaning efforts.”¹



¹ Mitrtech. “Workflow Automation in Legal Operations: Justin Hectus Interview.” Mitrtech. January 3, 2018. <https://Mitrtech.com/riding-wave-change-interview-justin-hectus/>.

One Legal Ops leader faced with that choice was Connie Brenton, the Chief of Staff/Director of Legal Operations at NetApp. As a legal innovator, Connie believed both in-house and outside law firms could make tremendous efficiency gains by implementing workflow automation.

Until recently, there were few technologies dynamic enough to bridge the gap between Legal Operations and external counsel – what she calls the “legal ecosystem.” When her team finally decided on the right SaaS legal workflow automation platform, they soon found that...

“It’s one of those crazy, life-changing technologies...the minute we started using it we found it was incredibly easy to implement, inexpensive, and with a high ROI.”

That ROI takes many different shapes, however, from “hard” ROI in terms of immediate bottom-line rewards to “soft” benefits that still have profound impacts on Legal Ops, the people who work there, and even its role in the enterprise.

“...the minute we started using it we found it was incredibly easy to implement, inexpensive, and with a high ROI.”

CONNIE BRENTON

Chief of Staff / Director of Legal Operations
NetApp

The pressures and demands being placed on corporate Legal Operations departments have forced an evolution in how they evaluate and apply new technology solutions. By employing workflow automation and proving the substantial and very immediate ways it provides ROI, these Legal Ops teams are actually lighting the way toward new levels of efficiency, agility, and collaboration that can extend to almost every corner of their organizations.

In this guide, we'll walk through just **12 different ways** a Legal Operations department can maximize Return On Investment by adopting the right legal workflow automation (LWFA) solution.



01 Removing Labor Costs

Old-school manual processes are costly and cumbersome, and often aren't properly or consistently executed. Tracking a manual process is tough, so key steps can be missed. Even the most stringently-diagrammed manual process still leaves too much room for variation. These mundane, repetitive, time-sucking processes are ripe for workflow automation.

By digitizing and standardizing them using a SaaS LWFA platform, Legal Ops managers can ensure they're executed the same way every time, and can be monitored to optimize performance, while significantly cutting the cost of executing each workflow.

McKinsey says 60% of all occupations can have at least 30% of their activities automated.²

In one Legal Ops case study, the before-and-after difference from automating a single nondisclosure form (NDA) workflow tells the story.



Here's another model, using figures derived from actual automation adopters:



Another facet of this? Automating these processes allows staffers to focus on work more deserving of their talents. By manually producing just three documents a week, for instance, a senior attorney could be wasting \$1,350 per month in lost billable time versus using automation.

Automating these processes allows staffers to focus on work more deserving of their talents.

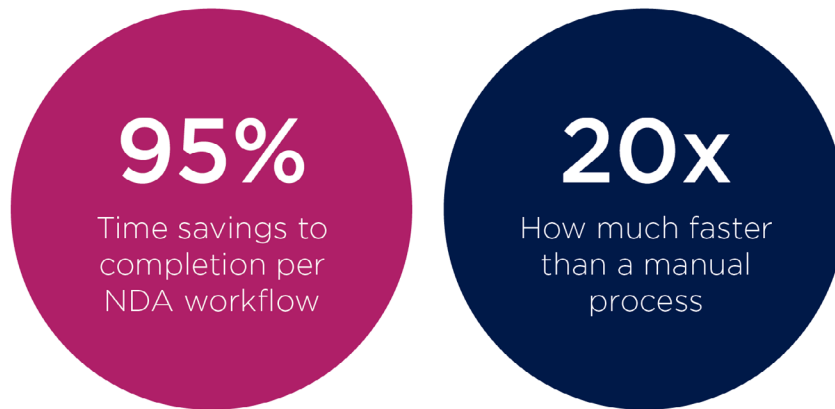
02 Accelerating Speed-to-Completion

According to a ServiceNow survey, 86% of managers feel automated work processes would increase employee productivity, and they're absolutely right. In the workflow automation example we just cited, there's another benefit that can pay compounding dividends for Legal Operations: increasing the speed-to-completion (and process success rate) of workflows.

Legal Ops becomes
seen as as a reliable and
responsive resource.

The amount of time it takes to complete the NDA workflow we described is cut 95%. Or to put it another way, a process using LWFA can be 20 times faster than when it was being done manually.

Your human assets can now be better deployed.



Slashing the time involved in completing a process becomes a much more tangible benefit when you consider how those human assets can now be better deployed against more productive work.

Executing workflows faster has another payoff: The newfound respect with which Legal Ops is viewed by internal clients and stakeholders. By becoming quicker at fulfilling their legal services requests, Legal Ops isn't seen as a bottleneck or impedance to business processes, but as a reliable and responsive resource.

03 Eliminating Human Error

It's been scientifically proven: Human beings have a real talent for making mistakes when it comes to repetitive processes.

A UNLV study proved the point by asking each of 215 students to review 30 data sheets, requiring them to verify accurate entry of just six types of data. Each student still made an average of 10.23 errors. When an automated system double-checked the sheets, the rate fell to 0.38 mistakes.³

When dealing with repetitive tasks such as form and document preparation, data entry, routing, archiving, et al, people are prone to mistakes because of the sheer impossibility of staying focused on tedious routines. Automating Legal Ops workflows removes these opportunities for human error.

People are prone to mistakes because of the impossibility of staying focused on tedious routines.

When staffers are preparing critical documents, LWFA can eliminate human errors, too: Since legal content and data can be pulled from a single unified database, as in a SaaS legal workflow automation system where templated documents, forms, clauses and other vital legal content are standardized, there's far less chance of human error.



04 Ensuring Compliance

Let's say a Legal Ops department is part of an organization in a heavily-regulated industry, like banking. Making sure everyone is in compliance, whether in following rules and regulations or in maintaining bulletproof audit trails that would satisfy Sarbanes-Oxley or other edicts, is a key responsibility of that team.

When you consider that over 3,000 regulatory rules were issued in 2015, it's apparent that maintaining compliance is a constantly-evolving challenge.

Because the costs of non-compliance can be steep.

We mentioned banking because it's a prime example: From 2008 to 2016, global banks were fined \$321 billion for various regulatory violations.⁴

Maintaining compliance is a constantly-evolving challenge.

⁴ Finch, Gavin. "World's Biggest Banks Fined \$321 Billion Since Financial Crisis." Bloomberg.com. March 2, 2017. <https://www.bloomberg.com/news/articles/2017-03-02/world-s-biggest-banks-fined-321-billion-since-financial-crisis>.

A best-of-breed SaaS legal workflow automation platform can safeguard compliance in several ways:

- By preventing mistakes from happening in the first place by using form-building tools to let users embed customized fields and pre-defined data (like clause language) into standardized templates or even customized contracts, reducing errors.
- By quickly accommodating regulatory changes by editing the standardized form, document and workflow templates and content being used by Legal Ops and others.
- By automatically warehousing workflows in secure centralized archives, included all associated assets, for easy retrieval and audit at any time.

05 Policing Participation

According to a ServiceNow study, 8 in 10 companies – both large and small – are still using “unstructured” manual methods like email, spreadsheets, and personal visits to drive routine work processes.⁵

In a Legal Operations environment, those can be key contributors to delays, sloppy processes and slipshod work. For a workflow to run smoothly and maximize the quality and value of its output, timely participation by everybody involved – especially if they’re key players like lead counsel or clients – has to happen.

A legal workflow automation platform should be able to automate the function of notifying process participants at the exact time they’re needed to step into the workflow and send them reminders if they don’t take a specified action. Since these workflows can be monitored by management, it’s in everyone’s best interest to do their part in keeping the workflow running at efficiency.

Policing participation helps build a greater sense of partnership.

⁵ “ServiceNow Survey Spotlights the Workplace ‘Productivity Drain.’” Business Wire. April 21, 2015. <https://www.businesswire.com/news/home/20150421005419/en/ServiceNow-Survey-Spotlights-Workplace-‘Productivity-Drain’>.

Moreover, policing participation helps build a greater sense of partnership both within a Legal Operations department and with its enterprise clients, external counsel, and other process stakeholders.

Furthermore, there's a hidden cost benefit to automating notifications instead of having them manually written and sent:

Hidden Cost Benefit to Automating Notifications

A Legal Ops Staffer's Hourly Pay	\$50
Notifications he or she writes per workday	5
Hours to write/send all five	2.5

Total cost per year per staffer \$6000

There's a hidden cost benefit to automating notifications instead of having them manually written and sent.

06 Fostering Better and Smarter Collaboration

SaaS workflow automation has empowered greater and more efficient collaboration and connection between Legal Ops teams and those they service or call upon for outside help. That collaboration results, obviously, in better-run projects and a higher level of trust among everyone. Which, in turn, can lead to more engagement between Legal Ops and its client departments and teams, which then builds its reputation.

It's a virtuous circle that's increasingly necessary in today's enterprise. A workflow automation platform shouldn't just open up collaboration, though. We waste, by some reckonings, *four hours a day* on managing email. ⁶

Faster speed-to-completion and efficiency spurs innovation and more focused teamwork.

⁶ Dewey, Caitlin. "Analysis | How Many Hours of Your Life Have You Wasted on Work Email? Try Our Depressing Calculator." The Washington Post. October 3, 2016.

https://www.washingtonpost.com/news/the-intersect/wp/2016/10/03/how-many-hours-of-your-life-have-you-wasted-on-work-email-try-our-depressing-calculator/?utm_term=.3bcd8309bb28

Eliminating email threads and document attachments to carry out vital processes is one way workflow automation can streamline collaboration and empower Business Process Management. Teamwork is precisely orchestrated and directed, which pays off with:

- Deeper employee and stakeholder engagement, increasing job satisfaction.
- Faster speed-to-completion and efficiency, as natural collaboration spurs innovation and more focused teamwork.
- Greater innovation since knowledge sharing results in smarter outcomes.



07 Digitizing Archiving

There are surprising costs involved in storing and retrieving paper documents. And even bigger costs if they're lost.

According to Iron Mountain, organizations spend 5% of their budgets on filing. For instance, it costs \$25,000 in labor and materials to fill a four-drawer file cabinet, and another \$2,000 to maintain it every year.

Some estimate an average of 50-70% of commercial office space is dedicated to document storage, even though half of that documentation is duplicated, and most of it is never accessed again.

PricewaterhouseCoopers estimated finding a lost document will cost a company \$122, on average, and \$220 to reproduce. Worse yet, 7.6% to 10% of all company documents are lost or completely misfiled.

Professionals using paper-based workflows spend up to 35-50% of their time searching for information because of the lack of a centralized index or asset repository.

IDC found that professionals using paper-based workflows spend up to 35-50% of their time searching for information because of the lack of a centralized index or asset repository.

With a legal workflow automation platform, documents and other assets can be digitized and archived automatically, eliminating the need for paper files. Any document can be retrieved almost instantly, so there's never a concern about vanished paperwork.



08 Minimizing the Need for IT and Training

A SaaS legal workflow automation dispenses with any customer need for costly infrastructure, or the maintenance and development costs that go with it.

Software updates are the province of the vendor, so Legal Ops will always have the latest version of the product in hand. The best LWFA solutions are also built around ease of use, with drag- and-drop user interfaces allowing even complex forms and workflows to be designed and published with no need for custom development.

After relatively little time, Legal Ops staff can become competent users; often, they'll advance to being "power users" who actually tutor others, even outside of Legal Ops.

After relatively little time, Legal Ops staff can become competent users.

“One of the benefits,” Connie Brenton said, referring to her experience with SaaS WFA, “is that you don’t need IT. The fact we can configure it ourselves is a reason it’s a big win inside the company. We can train anyone; it’s a self-serve technology, and that’s unusual.”



09 Permanently Preserving Expertise

Even with the newest advances in technology, the most powerful asset of Legal Operations is the brainpower and expertise of its lawyers and support staff.

That's why, when a veteran counsel or key employee elects to leave, it usually represents a painful loss of specialized knowledge for the department that's expensive to replace. Unless, of course, you can somehow manage a brain-dump of all their acquired wisdom in the weeks or months remaining before they head out the door.

The most powerful asset of Legal Operations is the brainpower and expertise of its lawyers and support staff.

Workflow automation allows you to retain some share of their knowledge, though. Since workflows, whether manual or automated, are drafted based on the insight and experience of the people who've been executing those Legal Ops processes, their expertise is embedded in the business rules and content assets hard-wired into those workflows.

LWFA gives Legal Ops a unique tool for capturing and retaining the earned experience and talent of the people who work there, so it's accessible even after they've left.

Workflow automation
allows you to retain
people's specialized
knowledge.

10 Extending the Value of Legacy Systems

Three little words guaranteed to strike dread into the heart of a CIO or CTO? “Rip-and-replace.” The CFO isn’t too fond of them, either.

As Legal Operations grows, it spans other departments and stakeholders employing its services. But as it grows, so do the size and number of integrations between legacy technologies. At some point, neither these integrations or the older platforms they connect can sustain further growth.

A state-of-the-art legal workflow automation platform will be able to deliver out-of-the-box API integrations that help unite all the disparate legacy systems a Legal Ops department or the enterprise at large have come to rely upon.

So rip-and-replace can be avoided for those systems, whose functionality is actually expanded by virtue of pairing with an LWFA platform that’s automating the workflows where a legacy system like billing or ERP is going to be utilized.

LWFA API integrations can help unite disparate legacy systems.

11 Positioning Legal Ops as an Enterprise Leader

The idea of using workflow automation as a tool for strengthening the Legal Ops “brand” within an organization was important to Connie Brenton at NetApp. Being able to instill collaboration with other groups, while evangelizing the workflow automation tool making it possible, helped raise her department’s visibility and positioned it as a leader in driving digital transformation within the company.

“It’s been a business enabler,” Connie says. “We use it to run our own department, and it’s how we help people run their departments.

“It allows us to create processes that are streamlined, which has helped our company embrace digital transformation. We save, on the average, \$70,000 a week from using electronic signatures. That’s equivalent to \$3.6 MM a year.”

“We save, on the average, \$70,000 a week from using electronic signatures. That’s equivalent to \$3.6 MM a year.”

CONNIE BRENTON

Chief of Staff / Director
of Legal Operations, NetApp

Legal Ops can become a closer strategic partner for other groups within the organization by demonstrating LWFA benefits, and even tutoring and mentoring others in using the technology. They can thus become a key driver in enterprise evolution toward BPM and digital transformation.



12 Optimizing Time-To-Value

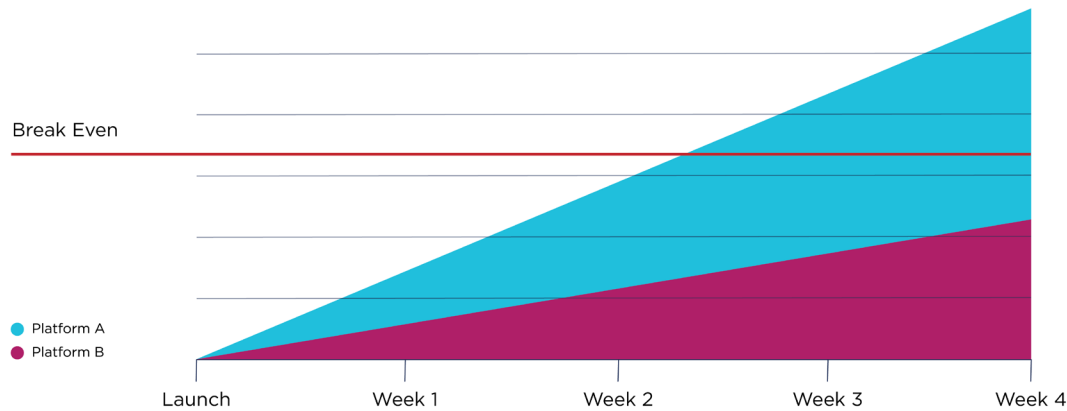
Mention “ROI” and most of us will jump to thinking of “return” in bottom-line terms. How much will it save? How much revenue will it directly or indirectly generate? In evaluating any process technology platform, a would-be Legal Ops adopter ought to think outside that particular ROI box.

They ought to set their eye on another metric that’s just as important: Time-To-Value, or T2V.

Time-To-Value is the measurement of the time it takes to realize the returns you get from your legal workflow automation platform investment. The benefits of faster payback should be obvious: The sooner you’re past the break-even point, the sooner the enterprise begins profiting from adoption.

The two hypothetical workflow automation products shown in the graph on the next page each deliver different T2Vs. Platform A reaches the “payback point” much faster than Platform B, so dividends begin accruing to the organization a lot sooner.





There are, of course, multiple factors that can impact T2V:

- The cost of the platform.
- The speed and breadth of its implementation across Legal Ops and the rest of the organization.
- Infrastructure costs, if any, dictated by platform configuration (network hardware or on-premise servers, for instance).
- Support costs, such as for a platform needing more hands-on integration and maintenance by internal IT staff.
- Training requirements and the employee onboarding curve.
- How and where the platform is applied; is it being deployed for processes where improvements drive high returns?

Time-To-Value is the measurement of the time it takes to realize the returns you get from your legal workflow automation platform investment.

About Mitratesch

Mitratesch is a proven global technology partner for corporate legal professionals who seek out and maximize opportunities to raise productivity, control expense, and mitigate risk by deepening organizational alignment, increasing visibility, and spurring collaboration across the enterprise. Serving 1,200 organizations of all sizes across the globe, we represent almost 40% of the Fortune 500 and over 500,000 users in over 160 countries.

With Mitratesch's proven portfolio of end-to-end solutions, operational best practices spread throughout the enterprise, standardizing processes and accelerating time-to-value. By unlocking every opportunity to drive progress and improve outcomes, we're helping legal teams rise to the challenge of serving the evolving needs of the modern, dynamic enterprise.

Now, by offering TAP Workflow Automation, an easy-to-use SaaS solution for digitalizing and automating repetitive manual processes, Mitratesch empowers Legal Operations teams to extend legal best practices and compliance into workflows throughout Legal Ops and even the entire organization.

To learn more, visit www.mitratesch.com.

MITRATESCH

CONTACT US

info@mitratesch.com
www.mitratesch.com

Mitratesch US

+1 (512) 382.7322

Mitratesch EMEA

+44 (0) 1628.600.900

Mitratesch AUS

+61 (0)3.9521.7077