

Why Your Legal Ops Needs a Leading-Edge Workflow Automation Platform

Learn why the evolving demands of corporate legal departments demand adopting a WFA platform designed with Legal Ops in mind.

Table of Contents

- 1** Introduction: Expert Testimony
- 2** A Legal Ops Revolution
- 3** The (Many) Benefits of Legal WFA
- 4** What's the Right WFA Solution for Legal Ops?
- 5** Vision Made Viable: TAP Legal Ops Examples
- 6** Summary

01 Introduction: Expert Testimony

Properly deployed, workflow automation (WFA) can bring enormous benefits to any enterprise. But it can be uniquely advantageous for Legal Operations departments.

How? By helping them address a host of challenges:

- Corporate mandates to deliver more legal services more quickly, but while constraining (or even cutting) costs.
- The burdens of corporate, regulatory and statutory compliance, with penalties for mistakes and delays.
- The dangers of repetitive, high-frequency manual processes with multiple steps, which engender errors.
- The demand for transparency, centralization and collaboration, particularly as an organization grows

Automating Legal Ops workflows doesn't merely help overcome challenges, but creates ROI and cost savings that can be passed along to the corporation.

Automating Legal Ops workflows doesn't merely help overcome all of these challenges, but creates ROI and cost savings that can be passed along to the corporation. Plus, it liberates legal professionals to tackle more important tasks than wrangling outmoded workflows.

Another important benefit? It's an easily-implemented, immediately rewarding first step on the road toward complete digital transformation. By delivering "quick wins" in the form of expedited processes, error reduction, and rapid ROI, workflow automation provides a strong proof point in support of adopting other technologies.

An imperative evolution

Many of the Legal Ops professionals the ThinkSmart team has had the privilege to meet have had a longstanding vision of how workflow automation (WFA) is one key building block in the ultimate digital transformation of how they deliver legal services.

One of those people is Mary Shen O'Carroll, head of Legal Operations, Technology and Strategy at Google. She's also a leader of CLOC (Corporate Legal Operations Consortium), a legal professionals group dedicated to advancing the core competencies of Legal Operations, with technology as a cornerstone of that evolution.



The "go-to" organization for both information about legal operations and connections to the best Legal Ops professionals.

At a recent CLOC Institute conference, she laid out how innovations like workflow automation were inevitable. Why? Because they were grounded in basic good sense.

*“A lot of legal operations is complex, for sure. But a lot of what we do is putting common sense into motion. It is finding a way to do the things that might seem obvious but require massive change. Innovation doesn’t have to mean advanced technology or AI or robot lawyers. **Sometimes it just means changing the lens on how something is done and bringing other people to see the world the way you do.**”*

“This is the power of a community of people connected to a common vision. Together, we are creating the future of the legal industry.”



Proving the case for dedicated Legal Ops WFA

In this ebook, we'll delve into how workflow automation for Legal Ops has already progressed well beyond the "vision" stage. Corporate legal departments are already realizing the across-the-board benefits of WFA and Digital Transaction Management (DTM), and we'll hear firsthand from a number of those adopters.

Beyond that, though, we'll explain exactly why adopting a best-of-breed, SaaS-based workflow automation solution like our own ThinkSmart Automation Platform (TAP) is the right way to address not just today's needs but tomorrow's onrushing demands.

In doing that, we'll clearly show the many reasons why a corporate Legal Ops department should, first and foremost, employ a state-of-the-art SaaS legal workflow automation platform. One that's designed from the ground up to satisfy the very specific, dynamic, ever-changing needs of modern Legal Operations.



02 A Legal Ops Revolution

The National Association for Law Placement (NALP) is an association of over 2,500 legal career professionals, advising law students, lawyers, law offices, and law schools in North America and elsewhere. In a recent issue of its Bulletin, NALP's Executive Director, James G. Leipold, explained how workflow automation is going to transform the legal industry, in what he termed a "revolution."

At the heart of this change? He pointed out the growth of corporate Legal Operations departments, charged with streamlining legal functions and leveraging technology to create efficiencies. They're also responsible for procuring outside legal services, and are applying technology to wringing more efficiency out of those relationships, too.



An association of over 2,500 legal career professionals who advise law students, lawyers, law offices, and law schools in North America and beyond.

Leipold cautioned that, as he saw it,

"...the law firm world as we know it is going to be forced to change in ways that most law firm leaders and law firm lawyers have not yet begun to grapple with.

"Inevitably technologies will take on more and more of the work of lawyers, and legal operations professionals are actively engaged in figuring out how that development can be leveraged to save corporations money..."

"...if you think we've already seen disruption in the legal services industry, hold onto your hat."



Legal Ops teams will be using technology to manage document review, e-discovery, contract operations, compliance functions, and to automate “as many tasks as they can as fast as they can,” as he puts it, applying design thinking to “reengineer every function of the corporate legal department.”

One very positive outcome?

Rather than being a perennial cost center, through Legal Ops the legal department is now driving value at some of the largest corporations.

As legal needs grow, so does tech adoption.

As mentioned, the rising demand for legal services is a key driver for this change. The 2017 HBR Consulting Law Department Survey found that 82% of respondents expected their legal needs to increase over the next year, up from the prior year’s 79%

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To meet that demand, they're looking to increase operational efficiency, as Lauren Chung, managing director and survey editor for HBR explained:

"Law departments are building internal capacity, increasing capabilities and effectively managing demand by training internal clients to be more self-sufficient."

"...By leveraging available technology, law departments are optimizing internal resources and automating routine tasks."



Some of the ways they're striving for efficiency and cost containment, and how workflow automation can help?

Greater use of technology and analytics:

- More law departments are leveraging analytics and workflow tools, A.I. and other solutions. 46% of the respondents reported they were using a legal analytics platform, up from 39% the year before.
- Workflow software tools were, along with analytics, among the top five tech areas where legal departments and law firms were looking to implement solutions.

Centers of excellence (CoE) implementation for contracts:

- 79% of Legal Ops and law departments manage contracts through individual internal legal resources, but the use of CoEs is gaining ground.
- Workflow automation is an obvious tool for centralizing and standardizing contracts as part of a CoE's processes, which frees senior counsel to focus on more important tasks.

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Legal outsourcing and alternative service providers:

- Sending legal work to an external non-law firm resource holds down costs, and 21% of the report's respondents were outsourcing work that way.
- A workflow automation system can provide centralized monitoring of even outside vendors, and “unite the legal ecosystem,” as one of our own Legal Ops users recently put it.

We'll explore real-world examples of exactly how Legal Ops workflow automation is taking hold and “driving value,” as James Leipold put it. First, though, it's useful for us to catalog the benefits that have convinced legal departments to make the move to a state-of-the-art, SaaS-based legal workflow automation platform.

But brace yourself: it's a sizeable list.

03 The (Many) Benefits of Legal Ops WFA

To make sense of all the benefits an SaaS-based workflow automation solution can supply to Legal Ops and the corporation as a whole, let's review them in tiers:

Operational Benefits:

- Quick adoption drives quick results, especially with browser-based SaaS platforms with intuitive UX, drag-and-drop design tools and short learning curves.
- Workflow speed and efficiency increases now that users always follow a predefined work path.
- Significantly lowered operational costs owing to savings in time, labor, even materials.
- Immediate WFA ROI is common, as cost saving equal quick payback for a platform investment.

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- Scalability, since if a workflow correctly automated once, it can run a thousand times with just as much effectiveness.
- Verifiable execution of each process, with near-complete transparency into any workflow.
- Higher completion rates (process success) for all workflows.
- Accurate form and document completion, thanks to use of dynamic forms and document templates with embedded intelligence to guide accurate completion and submission.
- Process error elimination, owing to standardization and the automation of repetitive (and error-prone) tasks such as routing, archiving and notifications.
- More precise data capture, since the most accurate source is often the individual served by the workflow or the employee closest to the process, whose performance is judged by its outcome; giving them self-service access to the workflow drives input accuracy.
- Significantly lowered operational costs owing to savings in time, labor, even materials.
- Self-service productivity boosts. By using automated notifications to remove the tasks
- of chasing down colleagues to provide approvals or information, major productivity upticks happen.

- Minimization of costly attorney engagement with mundane/repetitive tasks.
- End-to-end process support, as we replace the limited process knowledge each individual participant along the chain may (or may not!) possess.
- Frictionless integration at lower cost as a best-in-class SaaS workflow automation platform will work smoothly with legacy systems and third-party products, eliminating the need for costly rip-and-replace installation or IT and developer consultation.
- Higher-quality work. A 2006 review of healthcare providers who had installed workflow automation found that not only were there expected benefits like time savings, reductions in staff stress and improvements in morale, but the actual quality of care being given to patients had improved.

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Compliance & Security Benefits:

- Compliance rates increase and liabilities are minimized. One simple example: an automated workflow won't forget a deadline, so late penalties can be reduced or eliminated.
- Improved auditing at a level sufficient for evidentiary purposes.
- Clarity, visibility and reportability is ensured for every workflow.
- Guaranteed archiving and disaster protection as workflows and assets are automatically stored in the Cloud (or on-premise or in hybrid configurations).
- Enhanced security, if your WFA platform is equipped to meet top-tier security certification standards and provide best-in-class e-signature integration, video identity confirmation, and even blockchain-based workflow audit trail storage.



Governance & Collaboration Benefits:

- Improved governance, as centralization and process standardization now work hand-in-hand, providing a framework for Legal Ops control and tracking and a cohesive risk management framework.
- Core data alignment from a single source of truth, making it far easier for employees anywhere to locate, manage, share and report on casework.
- Mobile and remote accessibility improves productivity and engagement.
- Augmented collaboration, especially if a Legal WFA platform features flexible collaboration tools and participant invitation/notification features.

Corporate & Cultural Benefits:

All the benefits listed above drive other meaningful “macro” benefits for Legal Ops

- Improved corporate and stakeholder services, thanks to increased agility, responsiveness, accuracy, security and other benefits.

Legal Ops teams adopting WFA are more responsive to corporate needs and viewed as positive change agents for driving process improvements in the organization.

- Stronger corporate client ties and partnership: Legal Ops can grow stronger ties with internal clientele once repetitive tasks have been automated, removing burdens on
- Elevated reputation within the enterprise: Legal Ops teams adopting WFA are more responsive to corporate needs, and may even be viewed as positive “change agents” for driving process improvements elsewhere in the organization.
- Positive morale: Legal firms that have deployed workflow automation have seen employees, especially Millennials, acquire a more positive view of the organization; younger attorneys feel they’re being supported by their firms and made part of a collaborative team.
- Job creation: Legal Ops departments have moved tech-heavy jobs in-house to accelerate development and deployment of customized tech tools to nurture better collaborations with clients, employees and end users.

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04 What's the Right WFA Solution for Legal Ops?

How does a workflow automation platform help a Legal Ops department reap all these benefits? It may seem counterintuitive, but it does so by avoiding giving users rigidly customized Legal Ops processes or solutions.

There's a good reason for that, going back to one of the key selling points that first drew business users to Cloud-based, Software-as-a-Service platforms. Older on-premise enterprise software systems lacked flexibility and customization, so users needed to adjust their processes and operations to suit the software, rather having the software adapt to how they operated.

That's never going to be a workable approach for most Legal Operations groups. Why?

A Legal Ops workflow automation solution needs to combine extraordinary flexibility, adaptability and speed with ease of use and rock-solid performance.

No two Legal Ops departments have the same needs. So a Legal Ops workflow automation solution needs to combine extraordinary flexibility, adaptability and speed with ease of use and rock-solid performance.

Today's best-in-class SaaS WFA platforms include a long list of indispensable features and functionalities that not only let Legal Ops users fast-track its deployment and ROI, but actually future-proof the platform against obsolescence.

Benchmarks for an Optimal Legal Ops WFA Platform

What are the components of a workflow automation solution that's been truly designed to meet current and future Legal Ops needs?

Cloud-Based (SaaS) Configuration

- Permits quick adoption across any range of devices wherever Legal Ops requires it, regardless of geography.
- Instills flexibility as users can work remotely.
- Accelerates speed-to-completion for Legal Ops projects and processes.
- Eliminates need for IT hardware investments, such as servers or network architecture.

- Removes reliance on IT as users need no technical training.
- Provider-managed upgrades and maintenance eliminate disruptions and costs.
- Clients and users can access self-service forms and/or documents on their own from the Cloud 24/7, cutting costs and boosting productivity.
- ROI is almost immediate, as an SaaS platform delivers quick benefits, savings and process acceleration.

Customizable

- Forms, documents and workflows can be thoroughly customized to the precise needs of a Legal Ops department or stakeholder/client via intuitive design tools.

Painless Integration

- Integrates smoothly with legacy systems and third-party products without “rip-and-replace” costs and and disruption

ROI is almost immediate, as an SaaS platform delivers quick benefits, savings and process acceleration.

Out-of-the-Box Integrations

- The platform comes ready to integrate with your own systems, and with leading third party platforms or apps such as e-signature providers.

e-Signature and Authentication Features

- Provides immediate use of e-signature tools from top providers such as DocuSign and Adobe sign.
- Offers access to other authentication technologies such as video identity verification.



Forms Flexibility

- Features a library of common Legal Ops form, document and workflow/case flow templates which are ready to publish or can be readily customized.
- Or allows you to convert existing documents and forms into dynamic formats.

Dynamic/Responsive Form & Document Features

- Embedded business intelligence makes workflows and forms smarter and more adaptable to different workflow contingencies.
- Multi-language support eliminates need for multiple copies of forms and documents.

Empowers Collaboration

- Flexible collaboration features allow process owners to easily include participants and nurture collaboration at any stage in a workflow.
- Unites internal and external members of the Legal Ops ecosystem.

Scalable

- Can quickly meet sudden or scheduled increases in demand without ruinous costs for additional architecture or support.
- Specific software features/services can be licensed strictly on an as-needed basis.

Ease of Training & Use

- Simple, intuitive interfaces and drag-and-drop design tools let users quickly become proficient in creating and publishing even complex workflows and forms.

Centralized Governance, Archiving & Accessibility

- Workflows and assets are stored in a common hub for optimum visibility and single-source-of-truth access and archiving.
- Cloud-based design means data and files are securely and redundantly backed up in case of disaster.

Simple, intuitive interfaces and drag-and-drop design tools let users quickly become proficient in creating and publishing even complex workflows and forms.

Device & OS Agnostic

- Works across any major desktop or mobile OS, permitting access and collaboration from any smart device.
- Functions either through a browser or downloadable app.

Superior Customer Support & User Community

- Is backed up by a support team that's readily available and eager to collaborate in devising bespoke solutions for your needs.
- Has a loyal and enthusiastic professional user community to share best practices and other insights.

05 Vision Made Viable: TAP Legal Ops Examples

TAP Workflow Automation Platform was developed to deliver every key feature and benefit demanded by today's Legal Ops users. The proof is in its performance, as you'll see in the following examples:

TAP Customer Case Study: Yahoo Legal finds a “transformational” solution

The Yahoo Legal team includes more than 150 legal professionals, addressing 30+ areas of the law on a 24/7 basis for a truly global corporation. Its General Counsel employs a team of Legal Ops professionals to support process optimization, budget management, outside counsel engagement, policy compliance, e-billing, contract management and more.

When Yahoo Legal turned to TAP, it found it was able to customize the platform to meet a wide range of specific demands – quickly and easily.

Jeff Franke, Senior Director of Global Legal Ops at Yahoo, reviewed many business automation platforms. But none met his team's demands.

"None were fully functional and easy to use. There are good industrial-strength solutions out there, but those require extensive IT support and don't allow for rapid development of new workflows by people on my team or others in legal. We need to be able to create and modify a workflow on the fly because policies, processes, and templates change all the time. And we must be compliant."

"We needed a business automation solution that was flexible and had a light footprint. It's essential that my team use and manage the platform with near zero support. And we needed a solution that was cloud-based."



When Yahoo Legal turned to TAP, it found it was able to customize the platform to meet a wide range of specific demands – quickly and easily:

- Yahoo Legal worked closely with the TAP team to extend its functionality to include “transaction management,” the ability to add workflow-related notes that can be modified on an ongoing basis without impacting the auditability of requests and approvals, helping with SOX compliance. Where they’d once relied on multiple, non-integrated tools and processes, requests and approvals could now be managed in on repository using a user-friendly interface.
- Legal Ops used TAP to accelerate engagement on sensitive matters like their spend authorization process for engaging outside law firms. Traditional P.O. processes took too long to bring outside counsel in on time-urgent matters; by automating the entire process with TAP, Yahoo Legal was able to allow much faster routing of key legal expenditures with in an auditable, SOX-compliant process.
- When they needed a new trademarking tool, TAP allowed a Legal Ops team member to define the process, identify added feature and built the workflow in a mere 4-5 weeks. “We created a workflow that manages trademark applications and reviews by our trade mark team, helps manage the transaction, support the brand, and complete all U.S. and international filings. This is used every day at Yahoo,” Jeff Franke said.

“Except for assistance integrating TAP with a human resources database to populate certain fields, and linking to our employee directory for single sign-on convenience, we have never needed help from IT.”

JEFF FRANKE

Senior Director of Global Legal Ops, Yahoo

The results?

- In Jeff Franke’s mind, TAP was “transformational,” allowing Yahoo Legal to save thousands of hours of costly staff time.
- Huge efficiencies are gained by automating common processes like NDAs, now served through global portals and workflows that eliminate need for expensive attorney and staff involvement.
- Yahoo Legal can now engage faster and more effectively, and TAP has become fundamental to their legal IT infrastructure.
- The team can create and manage workflows on their own, without going to IT. “That’s a home run,” according to Jeff Franke.

The image shows the classic Yahoo! logo in a purple, serif font. The letters are bold and spaced out, with an exclamation point at the end.

TAP Customer Case Study: NetApp saves millions via Self-Service NDAs

Connie Brenton serves both as president and CEO of CLOC and as chief of staff and director of Legal Operations for NetApp. She and her team felt there was one specific area where legal workflow automation could deliver immediate benefits: by automating and accelerating the NDA process.

In an article at *Above The Law*, she explained:

“It quickly became apparent that in the past, NDAs were not moving at the speed of business. The process took three to five days, but our business partners needed NDAs in front of customers in their offices, as they were presenting. They needed us to reduce the cycle time from days to just minutes.”

“We rolled out our first use cases, which affected our operations, and discovered this technology is truly unique. It worked so well and was such an easy implementation, we got very little pushback. It’s incredibly intuitive, so there’s very little training required.”

CONNIE BRENTON

Chief of Staff / Senior Director
of Legal Operations, NetApp

When her Legal Ops team TAP to set up electronic signature capability for NDAs, the results they saw were “immediate, quantifiable, and significant,” in her words. Electronically signing NDAs is now a pervasive self-service technology solution at NetApp that’s improved governance and cut the number of NDAs that go unsigned.

The results went straight to the bottom line: “All in all, it saves about **\$2.9 million** every year,” she said. “It was easy to set up, easy to measure, and led to significant ROI.”

- Using a self-service online portal and standardized forms, users can request and obtain error-free NDAs without any involvement by a lawyer.
- NDAs can be custom-designed or use TAP’s pre-formatted templates.
- A full template repository warehouses NDA templates to meet any contingency.
- Routing of requests to the right internal stakeholders, if needed, can be built into the NDA workflow.

“All in all, it saves about
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CONNIE BRENTON

Chief of Staff / Senior Director
of Legal Operations, NetApp

- Signature authority requirements are integrated into the workflow and can leverage secure e-signature tools.
- Real-time status monitoring provides process oversight.
- Stakeholders can collaborate in approval processes and more complex NDAs via online commentary/notation.
- Notifications and alerts can be dispatched to stakeholders at pre-designated points throughout the process.

“They (the TAP team) are the most wonderful group of people I’ve worked with. They truly care about your success, are incredibly intelligent and provide wonderful advice on how best to redesign your process, and are with you every step of

EMILY TEUBAN

Senior Legal Operations Manager
NetApp

The results?

- An NDA process can be up to 7 times faster, 15 times more efficient, with 100% compliance and up to 400% ROI.
- Simple standardized NDAs can be obtained any time, any location, without costly internal review by legal personnel, driving considerable savings.
- Via a single portal, large enterprises can now manage NDAs (and other common processes) at scale, even across global networks.
- Self-service forms provide a quick and standardized request intake process, eliminating errors and waste.
- Real-time oversight permits performance analysis and improvement of all workflows.
- Drives greater efficiency, accountability and a superior user experience for the legal department and business partners.
- NDA workflows are automatically backed up to a secure Cloud archive, and easily accessible for audit, governance and compliance purposes.
- E-signature integration standardizes secure approvals.



TAP Typical Use Case: New Business Intake

When Keesal, Young & Logan, set out to organize the firm's New Work Intake process as a hub that drew data from a range of other internal systems, it chose TAP as the legal workflow automation tool to help power it.

TAP worked perfectly as part of an architecture where multiple data silos were linked, including eDiscovery, conflict of interest management, e-signature, CRM, budgeting and pricing, accounting and billing, docketing, and others.

TAP has been the solution of choice for Legal Ops teams because of how flexibly and adroitly it integrates with legacy systems and third-party products to optimize the intake

- Using a self-service online portal and standardized forms, users can be guided through launching the intake process with a minimum of errors or delays.
- Intake documents can be custom-designed or use TAP's pre-formatted templates.

The logo for Keesal Young & Logan, featuring the firm's name in a serif font with a large ampersand symbol behind the text.

TAP worked perfectly as part of an architecture where multiple data silos were linked.

- A full template repository warehouses templates to meet any contingency.
- Forms, notifications and other intake-related documents or alerts are routed to the proper internal personnel.
- Signature authority requirements are integrated into the workflow and can leverage secure e-signature tools.
- Real-time status monitoring provides process oversight.
- Notifications and alerts can be dispatched to stakeholders at pre-designated points throughout the intake process.

The results?

- The New Business Intake process can be far faster and more efficient, so billable services can be initiated earlier.
- Standardized intake forms are available any time, any location, without costly internal creation or review by legal personnel, cutting costs.
- Workflows are automatically backed up to a secure Cloud archive, and easily accessible for audit, governance and compliance purposes.
- E-signature integration standardizes secure approvals.

“TAP has the power to connect people and instill a shared sense of possibility. I’ve seen that unfold in our firm, with clients and throughout the legal ecosystem.

TAP-fueled conversations create possibilities before any- one even touches the software-tapping into the curious optimism that brings out the best in all of us.”

JUSTIN HECTUS

CTO & CIO, Keesal, Young & Logan

TAP Typical Use Case: Contract Automation

With TAP Workflow Automation, Legal Operations teams are easily automating the steps involved in generating and managing legal contracts, whether they're simple tasks or a complex Contract Lifecycle Management (CLM) workflow.

TAP has let Legal Ops departments accelerate routing, reviewing and approving contracts with both internal and external parties. While eliminating costly mistakes and bottlenecks and delivering exceptional consistency, compliance, speed, and ROI.

- With TAP, you can automate any simple, specific action or repetitive task, such as moving a contract between folders (“Pending” to “Approved”) once it's been signed.
- For more complex contract generation processes, our drag-and-drop workflow designer makes it quick and convenient to route contracts through multiple gatekeepers and channels.

TAP's centralized dashboard lets you monitor the progress of all contract workflows.

- Automatic notifications and alerts keep participants engaged and taking timely action, and TAP's centralized dashboard lets you monitor the progress of all contract workflows.
- Execute cost-effective CLM by digitally centralizing documents, tracking contract work flows, automating expedited review and approval processes, and providing governance and analysis to continually improve the total process.
- TAP's form-building tools let users embed customized fields and pre-defined data into standardized templates or customized contracts, reducing human error and safeguarding compliance.
- TAP automatically, securely archives workflows and all documents, making audits far easier and ensuring transparency and accessibility, even from mobile devices.



The results?

- Integration of best-in-class e-signature providers and many other top-tier enterprise technology platforms extends Legal Ops' ability to transform the contract process into an automated, accelerated staple servicing clients and stakeholders.
- Automating all contract workflows provides scaled-up efficiencies and cost savings across Legal Operations.
- Superior governance is empowered thanks to real-time visibility into workflows across departments, teams or practice areas.
- Standardization of workflows minimizes errors and reduces compliance risks.
- Participants are specified on an as-needed basis for reviews and approvals, optimizing their role and controlling work hours.
- All workflows are automatically backed up to a secure Cloud archive, and easily accessible for audit purposes.

“What makes TAP ‘hot’ is that its customers can use TAP as an end-to-end solution to make their high-volume, costly, or complex business processes significantly faster, less expensive, more reliable, and error-free.”

JIM LUNDY

Founder / CEO, Aragon Research

TAP Typical Use Case: Outside Counsel Retention

Legal Operations teams are often given the job of identifying and engaging outside counsel.

But the process involved in creating, reviewing and getting sign-offs on counsel retention agreements can devour vast time and effort.

With TAP, Legal Ops users are quickly and easily designing counsel retention agreement workflows for managing the entire process of requesting, drafting, reviewing and authorizing agreements with outside counsel.

- Legal Ops user can design online forms using intuitive form/document-building interfaces, ensuring standardization via pre-approved templates with embedded business logic.
- Using online forms, users can enter pertinent information about prospective outside counsel, either using “request for retention agreement” form or by directly drafting a retention agreement.

Automated notifications and alerts ensure timely collaboration from every process participant.

- Requests and/or agreements are accurately routed to proper stakeholders for review and approval.
- Automated notifications and alerts ensure timely collaboration from every process participant.
- Approved retention agreements can be automatically routed to outside counsel for approval and secure e-signature.

“TAP empowers us to quickly streamline and automate business processes that are complex, repetitive, or time consuming. Adobe Document Cloud eSign Services reduces the time it takes to get a document signed. Together, the possibilities are endless.”

YUKA TZAVARAS

Senior Manager, Legal Operations,
Electronic Arts

The Results

- Self-service interfaces and workflow automation ensure efficiency and acceleration of the process, typically cutting its duration to a fraction of the time of manual workflows.
- Need for review and gatekeeping by internal counsel is reduced, cutting costs.
- Real-time reporting and tracking of every counsel retention agreement workflow take place in a centralized environment to drive superior governance.
- Standardization of forms, documents and workflows minimize errors.
- All counsel retention agreement workflows are automatically backed up to a secure Cloud archive, and easily accessible for audit purposes.

06 Summing Up

Summing Up

The urgency of change is becoming all-too apparent to Legal Operations departments at enterprises of all sizes, across nearly all industries. The need to control costs yet deliver a higher volume of outstanding legal services are the two main drivers of the new legal processes paradigm that's taking hold within these organizations. One that's singing the refrain, do it faster, better, cheaper.

Workflow automation software and other DTM tools can help make the transition from manual or semi-automated processes into a fully integrated digital workplace. But to safeguard against premature obsolescence, provide the highest possible level of operational flexibility and agility, and deliver maximum ROI for their platform investment, Legal Ops leaders need to apply a very fine filter to sifting through the multiplying products and performance promises vying for their attention and budget.

In the hard-won opinion of many successful Legal Ops automation adopters, the solution of choice is a SaaS platform that bundles simplicity of use, ease of adoption, flexibility and other vital features.

And for many of them, TAP has already proven itself to be that perfect solution. In their experience, it's a best-of-breed example of how to successfully accelerate legal department processes, banish the mundane, enrich collaboration, maximize outcomes and ROI, and lay a solid cornerstone for digital transformation.

In the hard-won opinion of many successful Legal Ops automation adopters, the solution of choice is a SaaS platform that bundles simplicity of use, ease of adoption, flexibility and other vital features.

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.

By now offering the TAP Workflow Automation solution, an easy-to-use SaaS tool 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.

For more info, visit: www.mitratesch.com

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