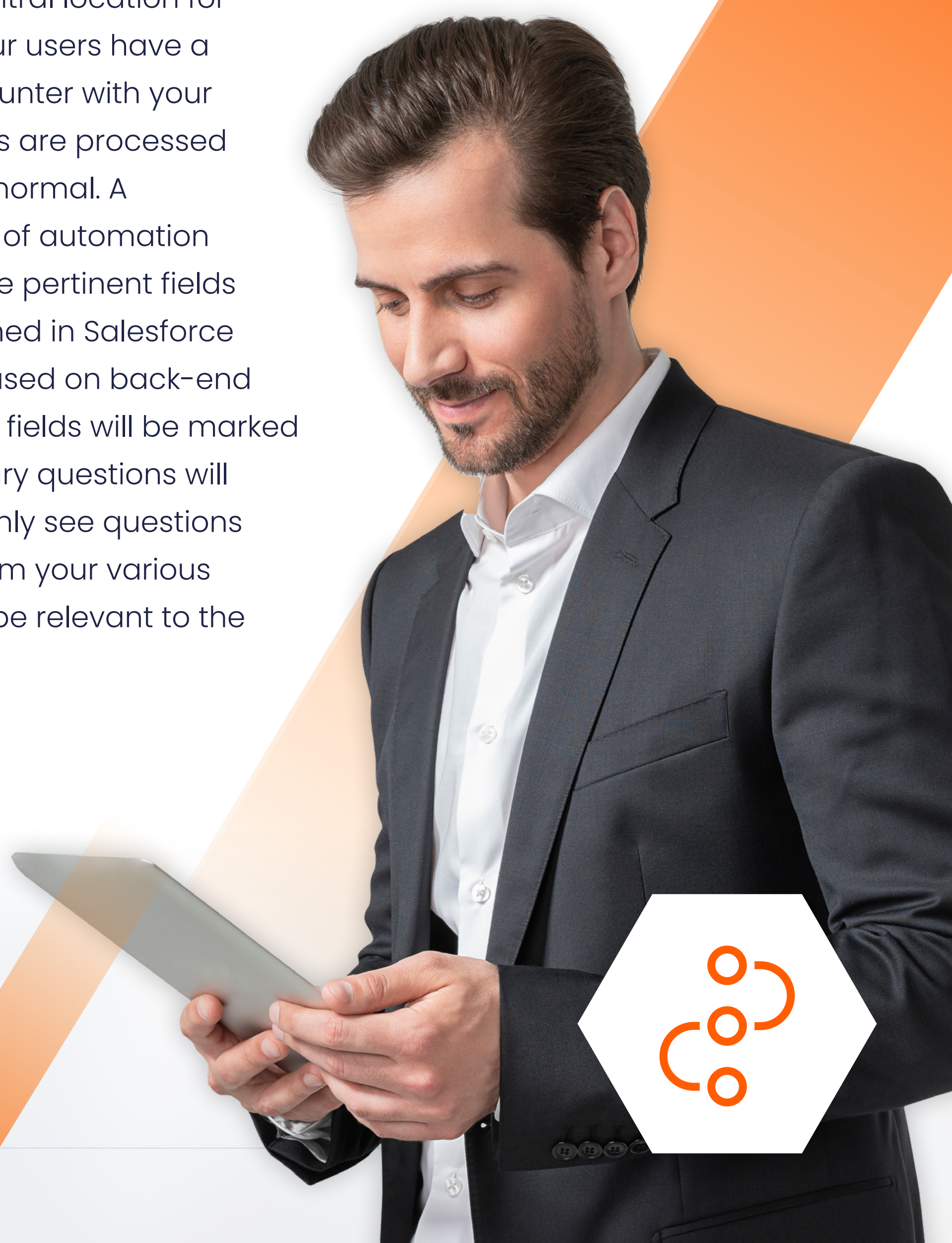
Anatomy of the Legal Front Door

A Mitratech TAP Workflow

A legal front door is a web-based, self-service portal that allows organizations to manage, review, and approve employee requests from one centralized location.

But it does more than provide a central location for your legal intake: it ensures that your users have a straightforward and coherent encounter with your legal team – and that their requests are processed and resolved more efficiently than normal. A single selection initiates a cascade of automation and conditional logic that brings the pertinent fields to the forefront. Information contained in Salesforce or your CLM tool auto-populates based on back-end integrations. And while the required fields will be marked and mandated as such, unnecessary questions will never pop up. Your end-users will only see questions that cannot otherwise be pulled from your various data sources, and they will always be relevant to the requests they are trying to make.

The impact of this shift is profound, not only enhancing user adoption by removing irrelevant questions but also streamlining the end-to-end process.



What Does a Legal Front Door Workflow Look Like, Anyway?

Here's a behind-the-scenes glimpse of a Legal Front Door Workflow in action, demonstrated in Mitratech's TAP platform.

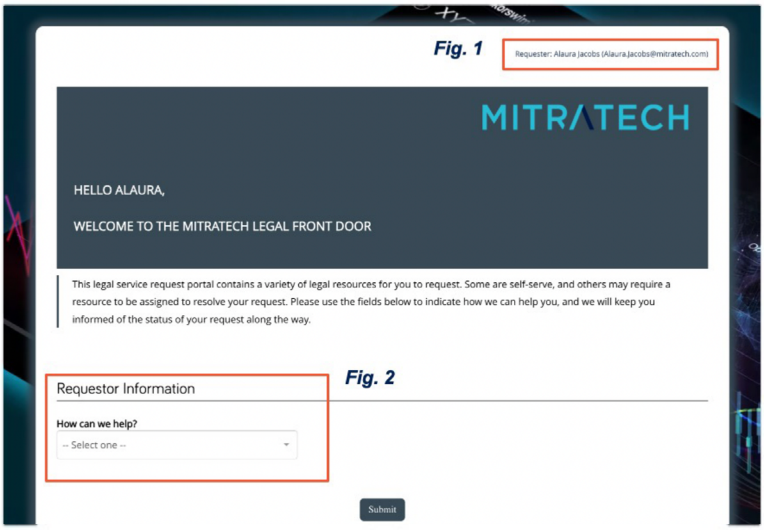


Fig. 1

Requester information is dynamically pre-populated from your active directory.

Fig. 2

By starting with just one question ("how can we help?"), users can select their request type without searching through every form type.

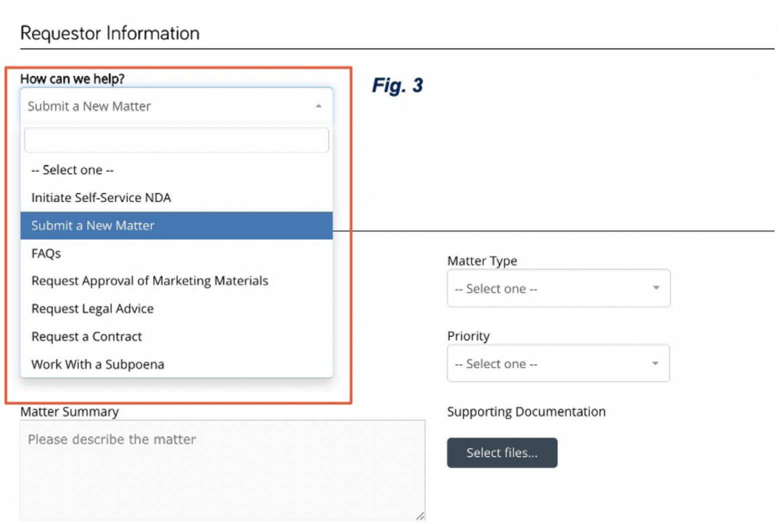


Fig. 3

The drop-down contains request types designed and defined by the legal team.

Once a request is selected, the smart form will show only the fields required to submit that request.

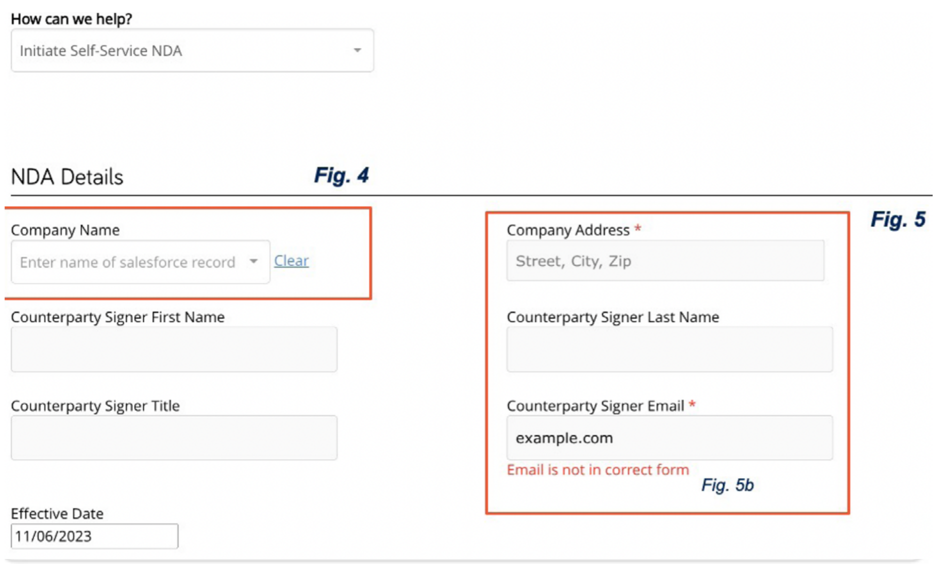
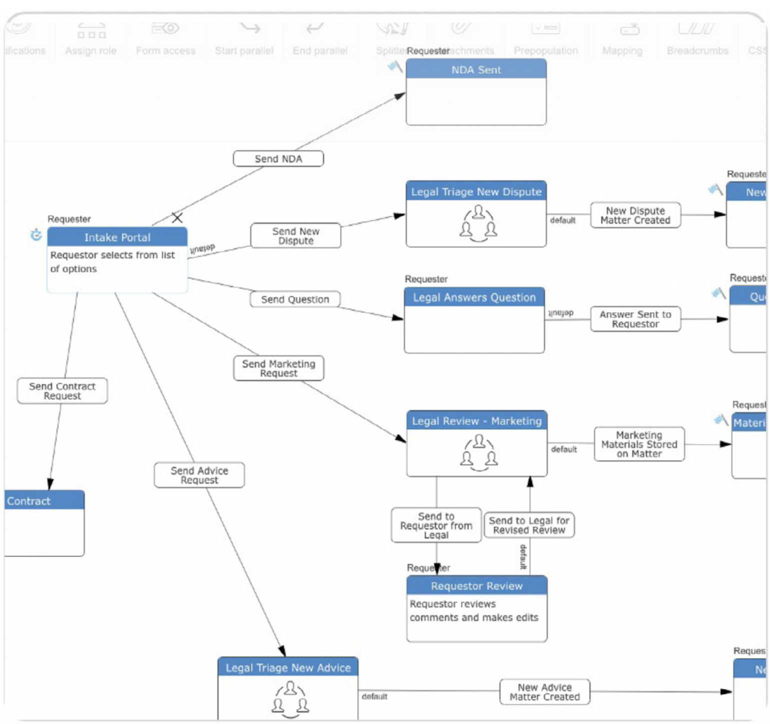


Fig. 4
The Salesforce plug-in allows users to search for, update, and connect records to their workflows.

Fig. 5
Help text and field validation guides users through the form to ensure accurate data collection.



Each request type has been designed with the fields and logic to drive to self-service resolution or assign to the appropriate legal support.

Workflow logic can include additional configurations like conditions, real-time collaboration, e-signature execution, Salesforce record updates.

The legal front door captures requester information that can speed up both the submission and the review process, like:

- Who the requester is (through SSO)
- Who their cost center is
- Who the relevant approver is (through Workday or another AD integration)
- Which account this ties to in SFDC

Auto-populating the request with information pulled from internal data-bases will also then accelerate any review or approval processes. Information will flow from one stakeholder to another, *automatically*.

And when all requests are stored together in one place, people can easily collaborate, review, and leverage a consolidated approval process. Multiple teams can work on requests simultaneously, with centralized access to contract data and insights like:

- Which kinds of requests come up most frequently
- How long each contract or review takes to complete
- How to equitably allocate team workload
- Where there are patterns of bottlenecks or escalation roadblocks

Gathering this data can provide insights that drive additional improvements. For example, just knowing that a given contract type was requested 500 times in one month empowers a team to create a pre-approved template that can streamline approval, minimize error, and save everyone time, money, and sanity.

Ready to elevate legal user experience?

Schedule a demo today.

Explore TAP ▶