

6 Ways Legal Can Accelerate Sales Deals with Workflow Automation

What if legal could be a resource rather than a roadblock when it comes to contracts, approvals, and more?

Closing deals quickly is the name of the game (especially in today's market), but it's no secret that the legal department has historically been seen as a roadblock when it comes to finalizing contracts. You can't trade compliance for a quicker turnover – ***but what if you didn't have to?***

With workflow automation in legal's arsenal of tools, the legal department can streamline manual steps (like document creation, review, revisions, approvals, etc.), enhance collaboration, and ultimately propel sales forward rather than slowing them down. Let's dive in with a closer look at 6 ways legal can lead the way with automation.



1 Rapid NDA and agreement generation

Non-Disclosure Agreements (NDAs) and standard agreements are the lifeblood of business negotiations. Automating their creation enables sales teams to generate these crucial documents on demand, without waiting for legal input. This not only saves time, but also instills confidence in prospects, showing them that your organization is agile and responsive.

2 Templatize and customize

It's not just NDAs; with automation tools like TAP, legal can generate a variety of contracts, including service agreements, certificates, waivers, and more, in a matter of minutes. Documents can be created once, templated, and then customized with the necessary details, ensuring accuracy and compliance every time.

3 Enable self-service

With self-service options for generating routine contracts and documents, sales can initiate a workflow to get help or a self-service template without ever engaging with a legal team member. TAP's dynamic conditional logic means that thresholds and triggers can be set for what is standard – and what needs additional review.

4 Compliance assurance

With workflow, the entire process is defined, which means compliance is built in. Sales reps can only submit a request with all the information first, and by embedding knowledge and compliance checks directly into the workflow, legal teams can rest assured that all documents meet internal procedure and regulatory requirements. Automation tools can also flag potential issues for review, minimizing risks associated with non-compliance.

5 Data-driven insights

Automation provides valuable data on the contract lifecycle, revealing bottlenecks and areas for improvement. This data-driven approach allows legal to continuously refine processes, allocate resources, and leverage staff where they are specialized or work best.

6 Real-time tracking and notifications

In a dynamic sales environment, knowing the status of a contract is invaluable. TAP provides real-time tracking, allowing sales teams to see where a document is in the approval process. Notifications can be set up to alert stakeholders when action is needed, ensuring that contracts keep moving forward without delay. With the Microsoft Team app, reps can view the status and owner directly in teams.

Automation promotes seamless collaboration between legal and sales teams. Real-time updates and notifications keep everyone in the loop, reducing delays and miscommunications. This level of transparency fosters trust and synergy between departments.



Elevating the Future of Legal Work with Workflow

With workflow automation, legal teams can transform from gatekeepers to enablers of sales success, taking a proactive stance in driving deals forward by streamlining processes, eliminating bottlenecks, and automating compliance. And when the contract lifecycle moves faster (with fewer errors), sales teams can do what they do best: **close deals**. It is a win-win for legal, sales, and the entire organization.

Ready to explore simple, drag-and-drop legal workflows that are designed to save your legal department time and money?

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