



The digital transformation imperative for **corporate legal operations**

A practical guide to delivering measurable progress

 Microsoft 365



Up until very recently corporate legal departments have prided themselves on maintaining the status quo: preserving traditional ways of working and assigning continued value to the informality of ad-hoc advice; of providing a personalised service to the business which isn't always logged and formally accounted for.

In 2020, many of these old methods of managing matters were challenged, redoubling the case for digital process transformation in line with other functions across the enterprise. The practical challenges of closing offices and letting professionals take their work home have prompted legal operations to review long-standing process pain points – most notably linked to matter intake and triage; filing of matter-related content and correspondence; and matter analytics and reporting.



The imperative to change

As legal operations reassess their position, many are conceding that they must devise a more sustainable approach to managing caseloads, optimising resources and demonstrating value to the business. It is important, they realise, to build a strategy that simultaneously delivers quick wins and is futureproof – able to evolve with the diverging needs of the business and capitalise on new technology advances as these emerge.

It is for this reason that many corporate legal teams are adopting a mainstream approach to digital transformation of matter management, based on the investments their organisations have already made in Microsoft 365. Today it is possible to consolidate all matter management processes via already-popular and highly-intuitive applications such as Outlook and Teams - while defaulting to existing document management systems as the repository for all matter-related content and correspondence.

By optimising all the powerful functionality of this popular and ever-expanding software suite, specifically for legal use cases, Repstor can help legal operations deliver process modernisation without over-extending their budgets or disrupting the way lawyers instinctively want to work.

So what is the potential, and what does that look like in practice?



Matter intake & triage

Matter intake – the point at which new legal work comes in – is an obvious place to start with process digitalisation, offering quick wins. Studies suggest that as much as 20 per cent of a corporate legal team’s time is spent on the admin surrounding intake, triage and allocation of new legal instructions from the business - clarifying what’s required and confirming verbal instructions - where there is no standardised process in place. (That’s not including the time spent delivering frequent ad-hoc matter updates expected by the business.)

It is no coincidence that Microsoft 365 has risen to new prominence for legal operations following the upheaval to normal working practices caused by Covid-19. Legal teams have realised just how well the platform lends itself to streamlined, trackable matter lifecycle management across any combination of locations – starting with matter intake.



Structured filing

Traditionally in-house legal professionals have governed themselves, looking after their own work and recording information in their own way on their own local hard drive, within their email account, or somewhere on a shared drive. This approach may have worked well for individuals, but it has also carried a risk which is magnified during times of disruption or absence – if a colleague needs to take over a matter for example, and needs to locate all the relevant files and latest updates.

Ad-hoc content management is inefficient for matter leads too – often requiring them to set aside several hours on a Friday to catch up with filing, or deciphering their scant notes to report matter progress at team meetings.

The rise & rise of Microsoft 365

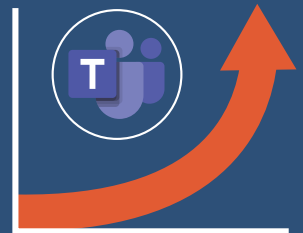
Microsoft 365 today is a cloud-based platform underpinning an extensive suite of integrated applications – plus ever smarter process analytics as the technology continues to evolve.

All of this has huge appeal to corporate legal teams looking to formalise their matter management activity. This is particularly the case given that most organisations have already invested in Microsoft 365 and use the platform extensively throughout their business today. Use continues to proliferate, too, as mainstream tools supersede specialist applications as the most effective way to accomplish tasks on the fly.

By the middle of 2020, MS Teams use was up 894 per cent on pre-Covid lockdown numbers, as all kinds of professionals defaulted to the easiest and most natural way to connect and collaborate on shared tasks and information.

Importantly, Microsoft 365 is where Microsoft is concentrating billions of development dollars, and experimenting with the hottest new advances in technology including artificial intelligence-based content analytics and machine learning.

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Benefits on both sides

A more standardised, centralised approach to matter organisation, based on Microsoft 365, has operational benefits for the whole team - and for business clients.

As long as it is made easy and intuitive for lawyers to properly record matter status information and file the latest correspondence and documents as they go, legal operations will be able to monitor progress - and professionals will be able to pick up each other's work more readily if required.

As recording and filing become instinctive and 'in stream', and matter archives become pooled, professionals are able to look up previous case files for precedents - and to save reinventing the wheel. As lockdowns and social distancing measures continue, reliable matter look-up and the means of intuitive, ad-hoc collaboration are essential to service continuity.

When alternative legal services provider Konexo adopted Repstor technology, making Microsoft 365 and Outlook the firm's default platform for matter management, it found it was saving an hour of fee-earner time per day – time previously spent chasing matter updates, finding the latest versions of documents, and switching between different systems to get the job done.

Business clients benefit greatly from systematic matter management, too – especially where they are given access to a self-service portal and/or automatic notification system which updates them on the evolving status of a matter. This scenario has the added benefit that lawyers no longer have to service routine queries – a time-consuming occupation that detracts from higher-value work.

Matter analytics

Once corporate legal teams have started to work in a more structured way, they can start to scrutinise their workloads in more detail. This is thanks to the operational data they are now capturing as they go. Reporting is made effortless too, as metadata about matters is captured continuously across the lifecycle of an engagement.

It's often this ease of reporting that captures people's interest during our demos for in-house legal teams. Harnessing the power of Microsoft 365, we can help build tailored dashboards which slice and dice the data for different audiences and purposes. For example, we can provide a high-level view across all matter activity, then drill down into the detail - to show relative activity, such as complex versus routine matters; litigation versus contract management; or variance in caseloads between jurisdictions.

Similarly, legal teams can use the dashboards to prioritise their time each day or week – by deadline, contract value and so on. Activity-specific dashboards, meanwhile, can help teams to closely monitor the lifecycle of contracts or of litigation cases, keeping any risk in check.



The corporate legal team of a major UK utility company has seen substantial productivity and efficiency gains from moving all matter management, analytics and reporting through Microsoft 365, boosted by Repstor. Benefits include reducing several days' work - involving multiple team members - spent preparing monthly business reports to just a few hours, and the ability to make better use of professionals' time. This could be as simpler, high-volume tasks are routed to paralegals, or outsourced to alternative legal service providers (ALSPs), for instance.

Evidence-based negotiations

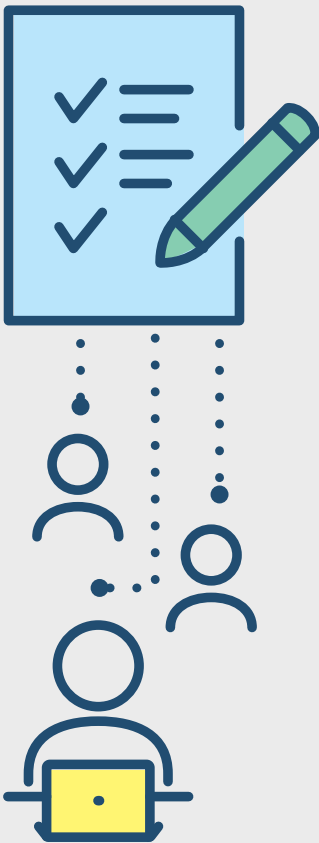
Formal matter analytics also helps legal teams present themselves to the business in new ways - with evidence of the value they add. This same evidence can also help when building a case for additional resources, where matter workloads are visibly expanding - perhaps as a result of business growth or new mergers and acquisition activity requiring additional legal support.

Without the hard facts at their fingertips, it is much harder for legal teams to get their point across - instead they must resort to a lot of manual chasing and best-guess estimates. Given that they typically already have the powerful and always-advancing capabilities of Microsoft 365 to hand, corporate legal operations are missing a trick if they do not harness them to plan, organise and monitor their matters more meticulously.



A case in point: contract lifecycle management

One of the most powerful use cases for more formal and structured handling of corporate legal matters is in contract management. All organisations produce contracts with frequency and in high volumes - spanning functions ranging from HR to sales, procurement and facilities management. Yet these documents can be very hard to keep track of without appropriate rigour and central visibility.



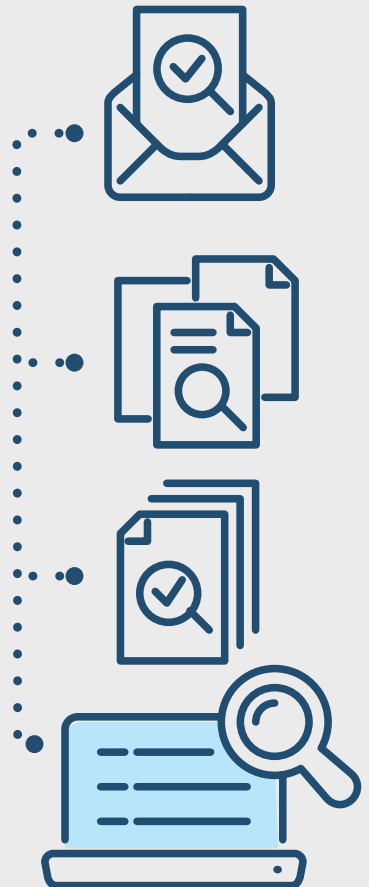
Given that the corporate legal team will need to have sight of most of these documents at some point, it makes sense that organisations work towards a more integrated workflow and viewing facility for handling contracts across their lifecycle – accessible by both legal professionals and the relevant authorised business users. Otherwise the respective parties will continue to rely on reminder notes and email to pass contracts back and forth between them as these documents are created, edited, approved, filed and renewed or cancelled/retired.

Closing the loop: an integrated approach

Although there are numerous tools on the market designed to streamline contract management, the common flaw is that these applications are not integrated with day-to-day legal matter management. So, no matter how efficient sales/procurement/HR/FM processes and systems might be, the flow to and from the legal team and the latter's oversight of contracts and their lifecycles is limited or non-existent.

Without a definitive master document management system for latest contracts, no one is quite sure where the finalised document is, and the business is exposed to a certain element of risk. That's because contracts could lapse or move beyond the optimum negotiation period, if there isn't a reliable means of tracking all contracts across their lifecycle from both sides (ie business/legal).

This, in turn, limits the legal function's ability to proactively add value for the business, for example in prompting contract reviews, comparing terms and proposing more favourable clauses.



Introducing smart automation

A more joined-up approach to contract management, and a more structured and shared means of filing documents and related correspondence, would enable a great deal more efficiency in the management of contracts. As well as being able to locate the right documents more easily, this could involve automating standard contract creation, using templates pre-filled with common terms and conditions. Dashboards and automated alerts, meanwhile, would alert business functions and legal teams to contracts coming up for renewal. And smart analytics could help determine which contracts carry most risk, or greatest value, ensuring that these move to the top of the pile or are given due attention.

At Repstor, we are seeing huge interest from corporate legal teams in integrated contract management and smart analytics. In challenging times, operations managers are keen to gain an earlier and deeper understanding of risk, and potential areas of weakness and opportunity. Dashboards that can help them track in-flight and existing contracts at a glance, and enable 'horizon-scanning' to determine current contract values or terms left to run, are powerful decision-supporting tools.

One of the first production-ready applications to come out of Microsoft's exciting Project Cortex AI/machine learning facility, incorporated within the Microsoft 365 platform – SharePoint Syntex – is ideally placed to help here. It paves the way for legal teams to analyse patterns in and extract data from documents stored in a central system of record. This facility could be used to highlight high-risk situations and identify similar content in a highly efficient and automated way across thousands or of contracts - relieving the pressure on legal professionals to trawl through every contract for potential exposure/affected clauses. The technology keeps learning and improving all the time too, the more it is exposed to an organisation's contracts.

Incorporating contract management seamlessly within a Microsoft 365-based matter management scenario would allow all of these controls to be brought to bear consistently and efficiently as part of everyday legal activity.

Accelerating the digital transformation agenda: if not now, when?

While the continued disruption of the pandemic might suggest that new IT projects should wait, the opposite is true. 'Normal' ways of working may never resume, or not in the short term, so there has never been a better time to embrace change – especially when it builds on investments most companies have already made, and addresses points of business pain that are magnified in the current climate.

It isn't just that legal teams are working from home now that is causing a rethink of established ways of working. The Covid-19 pandemic is forcing many organisations back to the drawing board when it comes to designing their workplaces for the longer term, and optimising the make-up of their workforce. As professionals' personal priorities change, and more lawyers decide to swap their daily commute for flexible working from a new home in the country, matter management practices will have to change permanently to hold on to valued talent.

So why wait to provide for such scenarios, when the need for strengthened collaborative working is so great right now?



A Repstor eBook | The digital transformation imperative for corporate legal operations:
a practical guide to delivering measurable progress



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 Microsoft 365

