

CASE STUDY

Transform Advisory Services



THE CLIENT

An \$18B global subsidiary of a Fortune 500 company that manufactures, sells and services medical diagnostic equipment, research equipment and related software

Industry

Manufacturing and Sales

Location

Headquartered in the Midwestern United States

Company Size

50,000+ employees across the globe

The Challenge

The client went through several lean initiatives and, as part of that process, reduced the size of its law department. The client's primary challenge was to find a way to enable its law department to focus on high-priority, business-critical legal work while still drafting lower risk contracts in a timely fashion. The client identified a large cluster of contracts that were:

- High in volume
- Fairly Standard
- Rarely subject to negotiation

The client engaged the Transform Advisory Services Team to develop a process and find a system to:

- Create standard templates for several categories of documents.
- Automate processes and allow business owners to create basic agreements without a need for law department review.
- Analyze more complex agreements to create clause libraries and playbooks for the creation of more complex agreements typically drafted by the law department.
- Create automated tools to expedite the drafting and negotiation of the more complex agreements.
- Integrate DocuSign into each of the solutions and create a workflow to store the executed agreements in the appropriate repository.

The Solution

The MLA Transform team undertook an extensive diligence process to understand and document the client's approach to contracting. That process included interviewing members of the law department to explore workloads, volumes and contract types and the IT team that supported the legal department. Together, the client and the Transform team developed an approach to automating the creation of certain types of documents and the prioritization of the work. The team then worked with stakeholders both inside and outside of the legal department to understand the volumes of the initial groups of contracts, how and by whom those contracts were currently being drafted, and what functionality was needed to draft compliant agreements in the most efficient way possible.

The Transform team created several automated solutions that allow business users to draft certain basic documents from any device with an Internet connection. As an example, team members can access a Web portal while they are in a customer's office, answer a series of questions and draft a non-disclosure agreement in minutes. That agreement can then be emailed to the client for digital signature directly from the field. In the rare instances where the customer wants to negotiate the non-disclosure agreement, there is a workflow process that routes the agreement to a designated attorney for review within the client's law department.

The Results

With the help of the Transform team, the client purchased a scalable contract management platform and successfully implemented the system within the deadline initially set for retiring the legacy systems. Presently employees across the globe are leveraging the system and the client continues to expand its use of the platform. Working with the Transform team gave the client the freedom to discontinue their efforts to build a homegrown technology solution and shortened the procurement and selection process by six to eight months.