



Automation – the time is now

ALTERNATIVE INSIGHTS IN PARTNERSHIP WITH TLT & CLARILIS

Automation is increasingly regarded as an essential tool for today’s legal functions to keep up with business demands. Indeed, around 82% of in-house lawyers said that legal document automation was top of their priority list for 2021. But precisely what automation means will vary enormously from one legal team to another. How can you best identify the value automation can bring to your business? And how do you ensure a return on your investment?

We conducted a series of interviews with organisations such as **Specsavers**, **Biffa** and **National Grid**, which have already implemented successful automation projects within their business, to find out more.

CONTRIBUTING COMPANIES



ANDREW KIDD,
LEGAL DIRECTOR,
CORPORATE



ZOE MORRISSEY,
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SARAH AIREY,
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FIRST UP, WE ASKED **ANDREW KIDD, LEGAL DIRECTOR, CORPORATE, AT SPECSAVERS,** TO SHARE HIS EXPERIENCES OF AUTOMATION.

Buy-in from across the business is essential

Andrew explained that it was the legal team that drove the automation process, but it was only possible to do this with the support of the other functions – and people – within the business. It wasn't because they felt they needed to 'automate' for its own sake, but because they wanted to work smarter, improve efficiency and be more consistent.

"The legal team handles a huge caseload of documents, most of which were being produced individually by hand. Our drive to adopt automated systems came from a need to do more with less, to keep pace with an ever-growing business. We wanted to improve our processes and look for systems and applications that could help us do that."

Understand your 'why'

At a basic level, the aim of automation is to be able to do more with less: less time, less effort, less resource. But to get real buy-in across the business, you need to go deeper than that, explained Andrew, to truly understand, in practical terms, *why* you are taking the automation route, and be able to communicate this decision in business language, not legal language.

"What are the tangible benefits to the business in investing in automation? Answer the how and what questions. Our 'why' was that we couldn't recruit more because of budgetary constraints, but the business was continuing to grow and we had to keep pace with that growth."

Start small and build on it

People can be uncomfortable with change, particularly when it costs money. And big changes cause more disruption than small changes. Andrew says that at Specsavers, they started with small automation projects – e-signatures and contract workflows – and only moved on to bigger solutions once they had been successfully implemented.

"Start small – pick on something that you can bring in fairly easily. If it doesn't need any IT integration, even better. For us, it was electronic signatures. Once people had seen that it worked, it was safe, it was low risk and, crucially, it significantly speeded up the process, it was easier to get buy-in for further solutions, like a contracts system."

Time is money

He says that instead of a lease taking three weeks to sign, it could now be signed in three hours with all the necessary workflow approvals and all the required signatures. That meant contracts could be completed quicker and new stores could be opened earlier, demonstrating clear added value to the business.

"Everything could now be done electronically. So, there was an immediate cost saving, but also a time saving, and that more than paid for itself. We found lots of other parts of the business were suddenly wanting to adopt this piece of software, too."

Be led by the task you need doing, not the functionality of the software

The priority for Andrew and his team was contract management. The legal team is spread over six countries and uses three different platforms. It needed a single central system to provide greater visibility and consistency of contracts.

"We decided very early on that we didn't want something that tried to do everything. So rather than getting distracted and saying we're also going to put something in to try and manage the entire contract lifecycle, we focused on identifying a solution that would deliver our core priority - a central, global contracts database."

Create a coalition of the willing

When exploring the possibility for e-signatures and contract automation, Andrew reached out to other parts of the business to share his thoughts. It quickly became clear that other functions could see the benefit and were keen to join the automation process.

"We reached out to our property team, our HR and people team, our procurement team, our supply chain product teams... It enabled us to create a coalition of the willing, which gave us a louder voice at the table when trying to influence the board as to whether we should do this."

Risk mitigation – more than efficiency savings

"It is more about thinking how you can work more efficiently, how you can improve your processes, become more consistent in what you do and manage your risks. If you go through that process, it inevitably leads to one obvious solution - automation."

Demonstrating ROI

Demonstrating return on investment for complex legal function automation solutions isn't always easy, particularly in a business as large or as complex as Specsavers. For Andrew, however, and perhaps, more importantly, for his colleagues across the business, the savings were clear to see from the very outset.

"For us, it was really simple to show we were saving money immediately. Processes that previously took weeks now took a few days, even hours. It adds up to a huge time and labour saving."

ZOE MORRISSEY, LEGAL BUSINESS PARTNER AT NATIONAL GRID, SHARES HER AUTOMATION JOURNEY, WHICH BEGAN IN 2015.

Drivers for automation

Spending large amounts of time on low value, highly repetitive document drafting was limiting the legal team's ability to deliver on its true strategic potential for the business. Zoe explained how she wanted to empower the wider business to do more themselves and not have to keep coming back to time-constrained lawyers. Not only would this reduce the legal team being seen as a bottleneck but it would also enable the lawyers to spend more time on more value-add, strategic activities.

"We were spending hours on some contracts removing square brackets just to get them into a good position to share with a counterparty and be able to start negotiations. We were also struggling with consistency as, understandably, individuals would often go back to the last similar contract they did rather than necessarily go back to a precedent, presuming there is one."

It's not always love at first sight

In spite of the possibility of removing pain points such as these, Zoe recalled some wariness in her legal team when it came to accepting automation as a part of BAU. She suggests team leaders have a role to play when it comes to supporting their teams in being open-minded as to how automation could support them and the business. There remains for some a fear that automation may impact on their roles. Zoe feels quite the opposite:

"I asked the team if they considered taking out 300 square brackets to be a good use of their time. Of course, they didn't, but prior to automation it was just part of the job. I also asked them to consider what they could achieve by taking out the noise – give themselves more thinking time and do more of what they enjoy doing and where they can really add value to the business."

Don't boil the ocean: be selective

"Find a pinch point and use it as a test ground," Zoe advises. **"Make sure you choose a contract that is right for automation and you will quickly realise the benefits and can grow and build from there."** This approach can self-perpetuate automation adoption as the wider business realises quick wins and looks for further opportunities.

THIS TYPE OF APPROACH IS ONE THAT IS ECHOED BY **SARAH AIREY, HEAD OF HR AT BIFFA,** WHO LED THE AUTOMATION OF THEIR OFFER LETTERS AND CONTRACTS WITH TLT AND CLARILIS.

She notes that gaining support from the wider business and other in-house teams was relatively straightforward as demonstration of the benefits in time saving and efficiency were clear to all.

"When we demonstrated how quickly you could produce an accurate offer letter and contract, we had little to do to sell the concept to the HR administration team and the Group HR Director."

The process of review and ensuring all documents and processes were in place before automation was key to its success at Biffa and resulted in a lot of welcome simplification of contracts and templates. The result is a more efficient, time-saving process that allows the HR team to now concentrate on their value-add and strategic activities for the business.

Automation is a specialist skill – leave it to the experts

"Automation is not something many lawyers know how to do. It is a specialist skill," Zoe explains. **"Some solutions we considered would provide the technology and 'automate' our contracts but we would then be left having to test and check all the numerous possibilities and outcomes. We just don't have the time or resource for that."**

That being said, Zoe cautioned that a full service automation company doesn't mean that you won't have any work to do, especially if precedents need tidying up. You need to accept that your team are going to have to spend some time upfront creating good precedents.

"Ask about support," she advises. **"Automation that is packaged up and given to you in this context does not come without its challenges. However, having access to ongoing support to design, test and build as part of the package is hugely helpful."**

AUTOMATION – THE TIME IS NOW

Great input results in great output!

What you get out of automation is directly related to the quality of the content you put forward.

Zoe says, “We really value the PSL-led managed service that Clarilis offers. Their PSLs effectively serve to bridge the gap between tech and law on our behalf. They do this by bringing best-practice experience to constructively challenge the precedent, which ensures the automation delivers the greatest benefits. This comes at no extra cost, so lawyers are less daunted by the number of questions they may wish to ask and feel comfortable picking up the phone at any time. It’s an incentive to engage which is great for testing, adoption and maintenance.”

For Biffa, the process resulted in a lot of welcome simplification too. “We reviewed everything,” Sarah explains. “You have to in order to automate, and that was a huge benefit. TLT helped us condense the number of clauses and reduce some of the complexity around the contracts. But from our perspective the most valuable benefit is about allowing us the time to spend on value-add activities, rather than any cost savings.”

Building trust from the business – test, and then test again

The value placed in testing should not be underestimated. Consider a contract with hundreds of variations – for many lawyers it is not going to be an attractive concept to test that yourself or try to fit it around your day job.

“Talk to the PSLs!” urges Zoe. “They will do a large amount of the testing for you, allowing you to do more dip check style exercises and be assured that the contracts, when automated, are doing what you want them to do. Having someone to talk to adds huge value. It also speeds things up! The ability to hit deadlines and overall turnaround times for answers to questions have been impressive – this is so important when building trust and buy-in from the business for both testing and adoption.”

Don’t take risks

“Automation enables consistency when either the lawyers or the business are sending out the first cut of a contract. It is also a way to ensure contracts can quickly reach customers to enable either a contract to be put in place or negotiations to start. The business sees the value of automation and the benefits it can bring to the relationships with their customers.”

Adding value to the business

“Feedback has been very positive. Cost is not always the key driver for us but when we have carried out a cost/benefit analysis we have found that the benefits outweigh the cost of the licence. A commercial lead in the business told me how it used to take three hours to get a commercial contract into a good starting position. Following automation, it took less than 10 minutes, meaning that the business can spend more time on the real value-add activities, such as making sure the services are right, and less time on administration of contracts.”

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SARAH AIREY, HEAD OF HR AT BIFFA

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Conclusion

Automation technology is a key tool of empowerment and efficiency for businesses. It is not purely a legal team issue as the business as a whole will benefit from the automation process, through reduction in business risk and ensuring more effective contracting across the business. This can free up budgets and legal team time to concentrate on more strategic and legally challenging issues.



TLT LLP and Clarilis are partnering to enable businesses to automate their document and contract creation process. This collaboration brings together TLT’s legal expertise (named by the FT as one of Europe’s top 50 innovative law firms) and Clarilis’ best-in-class automation software to provide clients with a solution right for their business. Automation takes the pain out of repetitive and procedural document drafting, giving in-house teams a structured way to draft complex contracts efficiently, quickly and with reduced risk.

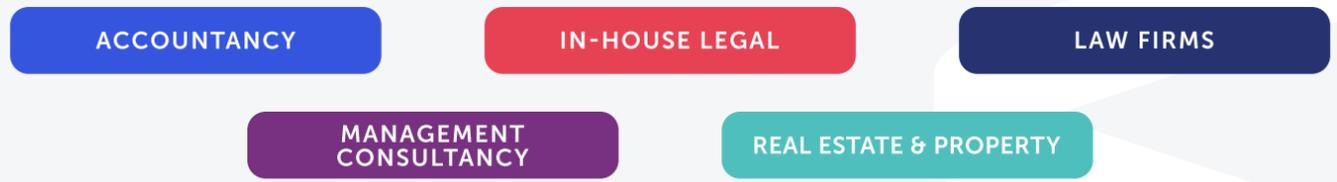
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