The digital transformation imperative for corporate legal operations

A practical guide to delivering measurable progress

Until recently, corporate legal departments prided themselves on preserving traditional ways of working — assigning continued value to the informality of ad hoc advice and providing personalized service to the business that wasn't always logged or formally accounted for.

With the disruption of the COVID-19 pandemic, 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 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.

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The imperative to change

As legal operations have continued to reassess their positions, many are conceding that they must devise a more sustainable approach to managing caseloads, optimizing resources, and demonstrating value to the business. It's important, they realize, to build a futureproof strategy that can simultaneously deliver quick wins, evolve with the diverging needs of the business, and capitalize on new technology advances as they emerge.

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

By optimizing all the powerful functionality of this ever-expanding software suite and tailoring it for legal use cases, Intapp can help legal operations deliver process modernization without overextending 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 and triage
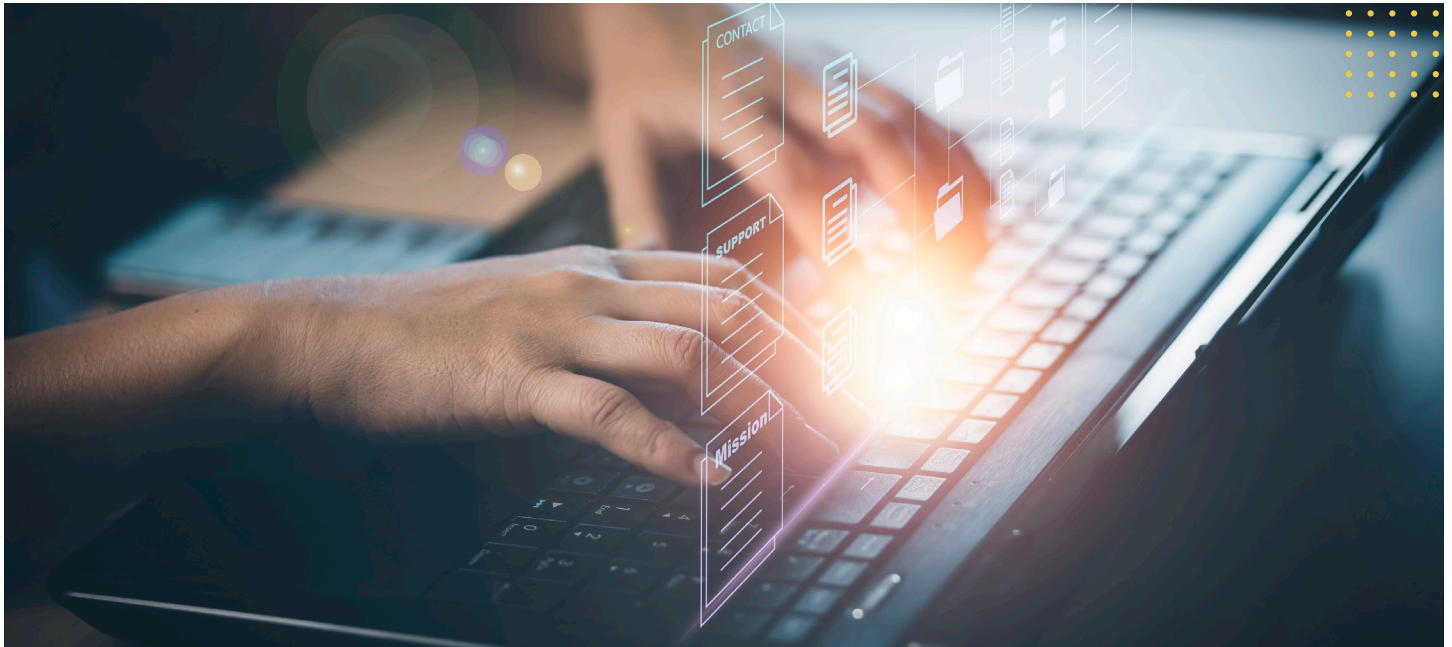
Matter intake — the point at which new legal work comes in — is an obvious place to start with process digitalization to capture quick wins. Studies suggest that as much as 20% of a corporate legal team's time is spent on the admin surrounding intake, triage, and allocation of new legal instructions from the business — clarifying what's required and confirming verbal instructions — where there is no standardized process in place. (That's not including the time spent delivering frequent ad hoc matter updates expected by the business.)

It's no coincidence that Microsoft 365 rose to new prominence for legal operations following the upheaval to normal working practices caused by the COVID-19 pandemic. Legal teams have realized just how well the platform lends itself to streamlined, trackable matter lifecycle management across any combination of locations — starting with matter intake.

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Business self-service

For starters, a set of structured, self-service digital forms can prompt stakeholders to provide the required intake information up front, streamlining efficient processing of routine legal requests — such as straightforward contract work, nondisclosure agreements, and simple advisory requirements. This saves legal professionals valuable time that would otherwise be spent capturing missing details.

Digitalizing matter intake needn't take away from personal relationships built up with the business, and some teams may choose to reserve self-service options for only certain kinds of engagements. That said, one of the major benefits of digitalization is that each interaction between the business and the legal department is recorded. This makes it easier to account for those lost days spent on "5-minute jobs" and demonstrate the true value the legal department provides to the business.

Intapp Documents for Corporate Legal: Your bridge to the future

As more corporate legal teams consolidate their matter management on Microsoft 365, Intapp provides an essential bridge — enabling tight integration and intuitive content management exchange with core systems of record. We can also help distill greater insights about working practices, as legal operations explore scope to be more efficient by being smarter in their resourcing and by automating routine processes.

"By leveraging the combined industry cloud power of Microsoft and Intapp through our strategic alliances, KPMG Law is raising the productivity of legal departments to a new level," said Philipp Glock, Partner and Co-Leader of Legal Operations Transformation at KPMG.

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Structured filing

Traditionally, in-house legal professionals have governed themselves, looking after their own work and recording information in their own ways on their own local hard drives, within their email, or stored on shared drives. Although this approach may have worked well for individuals, its inherent risks are magnified during times of disruption or absence — for example, when a colleague needs to take over a matter and 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 at the end of the week to catch up with filing, or deciphering their scant notes to report matter progress at team meetings.
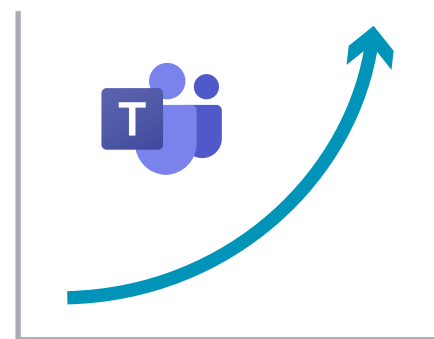
The rise of Microsoft 365

Microsoft 365 offers a cloud-based platform underpinning an extensive suite of integrated applications and ever-smarter process analytics.

These capabilities appeal to corporate legal teams looking to formalize their matter management activity. This is particularly true given most organizations have already invested in Microsoft 365 and use the platform extensively throughout their business. Use continues to proliferate, too, as mainstream tools supersede specialized applications as the most effective way to accomplish tasks.

Following an 894% rise in Microsoft Teams usage during the first few months of the pandemic, Microsoft Teams reported 145 million users in 2021, and 270 million users so far in 2022. More than a million organizations use Microsoft Teams as their default messaging platform as all kinds of professionals have gravitated to the easiest, most natural way to connect and collaborate on shared tasks and information.

By the middle of 2022, Microsoft Teams use has reached

270
million users

— up from 125 million users in 2021.

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Benefits on both sides

A more standardized, centralized approach to matter organization, based on Microsoft 365, provides operational benefits for the whole team — and for business clients.

By streamlining the process for lawyers to properly record matter status information and file the latest correspondence and documents as they work, legal operations will be able to monitor progress — and professionals will be able to pick up one another's work more readily, if required.

As recording and filing become intuitive and part of the workflow, and matter archives become a single source of truth, professionals will be able to look up previous case files for precedents and avoid reinventing the wheel. As remote and hybrid work models continue at many firms, reliable matter look-up and intuitive, ad hoc collaboration are essential to service continuity.

An FTSE 100 insurer, with a 250-strong in-house global legal department, deployed Intapp Documents for Corporate Legal to streamline matter management and content organization across its international operations. The legal department found it was able to improve visibility into matters, reduce demands on IT, and provide a foundation for AI and automation — all while maintaining a familiar, intuitive user experience for legal teams.

Business clients benefit greatly from systematic matter management, too — especially when they're given access to a self-service portal or automatic notification system that 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.
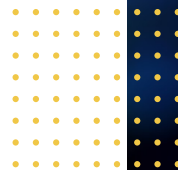
Matter analytics

Once corporate legal teams start to work in more structured ways, they can begin to scrutinize their workloads in greater detail thanks to the operational data they can capture as they work. Reporting becomes effortless, too, as matter metadata is captured continuously across the lifecycle of an engagement.

This ease of reporting is a key element of Intapp Documents for Corporate Legal. By harnessing the power of Microsoft 365, teams can benefit from tailored dashboards that analyze their data for different audiences and purposes. For example, Intapp Documents for Corporate Legal can provide a high-level view across all matter activity, then drill down into the detail to show related activity — such as complex versus routine matters, litigation versus contract management, or variance in caseloads between jurisdictions.

Legal teams can also use their dashboards to prioritize their time each day or week, filtering by deadline, contract value, or other factors. Activity-specific dashboards, meanwhile, can help teams to closely monitor the lifecycle of contracts or litigation cases, helping to mitigate risk.

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The corporate legal team of a major U.K. utility company has seen substantial productivity and efficiency gains from moving all matter management, analytics, and reporting through Microsoft 365, boosted by Intapp software capabilities. The team has been able to reduce the time it takes for multiple team members to prepare monthly business reports from several days of work to just a few hours — allowing their professionals to make better use of their time.

Evidence-based negotiations

Formal matter analytics also help legal teams present themselves to the business in new ways — along with evidence of the value they add. This evidence can help teams build a case for additional resources when matter workloads expand — perhaps as a result of business growth, or of new mergers and acquisitions (M&A) activity that requires additional legal support.

Without metrics and hard facts at their fingertips, it's much harder for legal teams to get their point across; instead, they must resort to best guesses and estimates. Given that they typically already have the powerful and always-advancing capabilities of Microsoft 365 at hand, corporate legal operations are doing themselves a disservice if they don't harness them to plan, organize, and monitor their matters more meticulously.

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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 organizations produce contracts with frequency and in high volumes — spanning functions that include HR, sales, procurement, and facilities management. Yet these documents can be very hard to keep track of without appropriate rigor and central visibility.

Given that corporate legal teams will need to have sight of most of these documents at some point, it makes sense that organizations should work towards more integrated workflows and viewing facility for handling contracts across their lifecycle — accessible by both legal professionals and the relevant authorized business users. Otherwise, respective parties will continue to rely on reminder notes and email to pass contracts back and forth as these documents are created, edited, approved, filed, and renewed, canceled, or retired.

Closing the loop: An integrated approach

Although there are numerous tools on the market designed to streamline contract management, a common flaw is that these applications aren't integrated with day-to-day legal matter management. So, no matter how efficient sales, procurement, human resources, and financial management processes and systems might be, the flow to and from the legal team — as well as the latter's oversight of contracts and their lifecycles — is limited or nonexistent.

Without a definitive master document management system for the latest contracts, no can be quite sure where the finalized documents are, and the business is exposed to a certain element of risk. That's because contracts can lapse or move beyond the optimal negotiation period if there isn't a reliable means of tracking all contracts across their lifecycle from both the business and legal sides.

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

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Introducing smart automation

A more modern, connected approach to contract management — and a more structured and shared means of filing documents and related correspondence — enables far greater efficiency in the management of contracts. In addition to being able to locate documents more easily, teams can automate standard contract creation, using templates pre-filled with common terms and conditions. Dashboards and automated alerts, meanwhile, can alert business functions and legal teams to contracts coming up for renewal. And smart analytics can help determine which contracts carry the greatest value — or the greatest risk — ensuring that they move to the top of the pile and are given due attention.

At Intapp, we're experiencing 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, as well as 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.

SharePoint Syntex — one of the first production-ready applications to come out of Microsoft's exciting Project Cortex AI/machine learning facility — is incorporated within the Microsoft 365 platform, and ideally placed to help with this capability. This facility can be used to highlight high-risk situations and identify similar content in a highly efficient and automated way across thousands of contracts — relieving the pressure on legal professionals to trawl through every contract for potential exposure and affected clauses. The more the AI technology is exposed to an organization's contracts, the more it keeps learning and improving.

Incorporating contract management seamlessly within a Microsoft 365-based matter management scenario brings to bear all of these controls 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, at least 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.

The ongoing changes regarding remote and hybrid work are also forcing many organizations back to the drawing board when it comes to designing their workplaces for the longer term and optimizing the makeup of their workforces. As professionals' personal priorities change, and more lawyers decide to swap their daily commutes for flexible working, matter management practices will have to permanently change to hold on to valued talent.

To discover how Intapp is helping corporate legal teams around the world to accelerate their delivery of digital transformation, or to discuss your own requirements, visit **intapp.com/corporate-legal.**

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