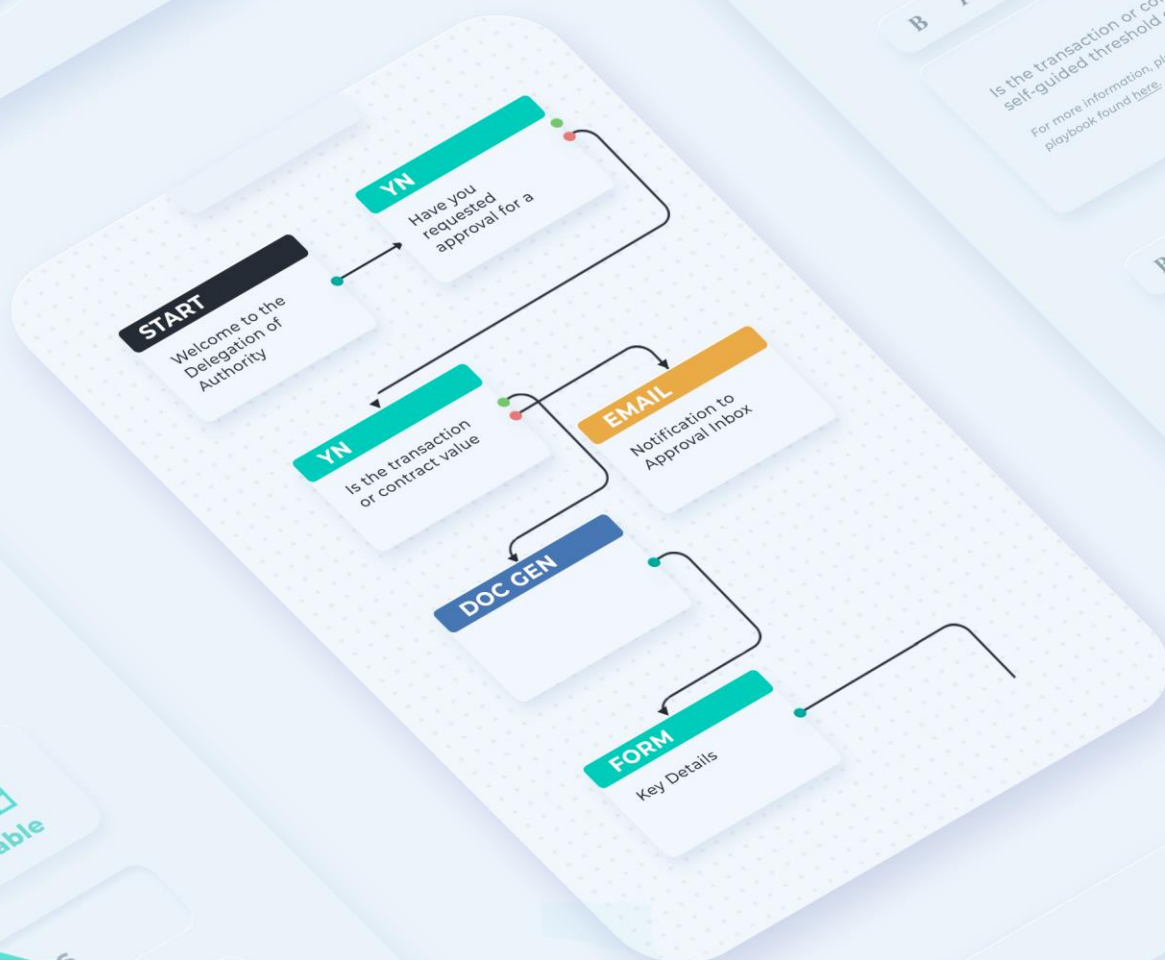




IN-HOUSE LEGAL

The Transformative Impact of No-Code

An insight into how modern legal teams create automation solutions easily and quickly without the need for IT.

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State of the Industry

Corporate legal departments are constantly faced with the challenge to do more with less. Given that people are an expensive limited resource, doing more translates to leveraging process and technology.

Like most corporate functions that service the broader enterprise, in-house legal departments are constantly facing with the challenge to do more with less. However, there is little to no support provided to legal from a priority or budgetary point of view when it comes to technology, and as a result, legal teams continue to work in very manual ways.

Though helpful in handling existing work, legal counsel still need to do tiresome work that is repetitive and low value, with the side effects of becoming a bottleneck for the business and a lack of visibility and inability to report on legal data and activity.

Whilst this reality is nothing new, changes in the industry have driven the attention to finally translate into action.



Key Challenges for In-house Legal Teams



Increasing volume of legal work as businesses and regulatory environments become more complex



Corporate strategy for cost reduction and simplification



Legal teams spending an increasing amount of time performing low value manual work instead of strategic high value work



Legal departments wanting to move up from simply being a support function to becoming more of a strategic adviser to the business



How Are In-house Teams Tackling These Challenges?

Given that people are an expensive limited resource, “doing more” translates to leveraging new technologies to automate away low value, time consuming manual work and enable legal teams to focus their attention on more meaningful strategic work.

How No-Code Addresses These Challenges

Today, most legal tech focuses on the storage of matters and of documents. Few technologies provide the capability to automate low value repetitive work, nor address complex end-to-end workflows.

So, how does no-code address these problems?

Unlike traditional technology that provides a pre-designed solution to legal teams, no-code platforms put the power of creation back into the hands of lawyers.

This is done by offering “out-of-the-box” lego block functionality that enable lawyers to create powerful applications that solve more complex problems end-to-end. Using drag-and-drop, lawyers design both the form based UI as well as the back-end decisioning logic.



Why lawyers within legal teams are perfect for no-code development

Whilst technology typically relies on I.T. experts to assist in the building out of applications, often over a period of months if not years, no-code enables lawyers to independently build applications to address their business problems in a matter of days if not hours.

So, why are lawyers well placed to leverage no-code to solve business problems?

In-house teams have a greater visibility of processes given their access to confidential information that the rest of the business is siloed away from. Combining this with their natural problem-solving ability, lawyers are well positioned to design no-code automation solutions that not only automate away low value work from the legal team, they are uniquely placed to automate work for the rest of business.

Takeaway

No-code empowers legal teams to do more with less and address the challenges of increased workloads from the business.

In this white paper, we'll explore how today's in-house legal teams are transforming the way they deliver legal services using no-code and to generate value for their business clients (through enhancing the process of accessing legal services), for their lawyers (who can automate away low value work spend more time on strategic high value work).



Opportunities for Legal Teams to Accelerate Transformation



Legal Intake & Triage

BUSINESS BACKGROUND

Today, legal teams receive a large volume of legal services requests from all areas of the business. These requests are often ad hoc, and come through various channels (e.g. email, instant messaging, phone calls, hallway conversations etc.) and can vary in complexity - from a simple document template request, to complex legal advice.

Given the manual nature of these requests, it is often challenging to determine if the requests are strategic in nature, whether the request is directed at the appropriate practice area, or if resources like self-service tools or knowledge bases already exist to address the request.

Additionally, legal teams lack visibility and insight around the nature of these legal services requests.

For almost all corporate legal teams, this often leads to a feeling that there is too much work and not enough time/resources to appropriately prioritize and simultaneously address all requests.



HOW CHECKBOX SOLUTION SOLVES FOR THIS

Checkbox's no-code Legal Intake and Triage (LIT) Solution enables legal teams to rapidly develop a decision tree solution that contains business logic and questions which reflect the type of legal requests that come from business.

Accessible to the business via the internal intranet portal, business users who require legal services enter the Solution and are prompted to a series of questions that help them structure their legal request and define the nature of their request.

Key Benefits



Accelerated turnaround time of basic legal service requests:

For requests that can be self-service, the business can quickly access the legal resources they need



Prompter addressing of complex, high value legal work:

Through triage, high strategic work is quickly identified and appropriately escalated for the legal team to address.



Less time spent by the legal team doing low value repetitive work and more time spent on strategic high value work:

With automation, legal teams enables the business to self-service low value repetitive legal work, and instead focus on value-adding work that is aligned with corporate strategy.



Improved decision making: With data visualization, legal teams are able to better understand the nature of requests coming in from the business, identify areas of high volume or complexity, and design more targeted legal processes, tools and services to address these areas.

Legal services requests are then routed appropriately based on business logic, and are either:

- Directed toward existing self-serve tools and/or knowledge bases for the business users to self-serve simple requests; or
- Appropriately triaged as a matter for the legal team to address based on strategic alignment and priority.

Dashboards visualize the insight and help:

- Identify which functions within the business request legal services.
- Summarize the nature of legal service requests (areas where there are high density of legal service requests) so that legal teams can iteratively adapt and improve self-service tools.



Key Functionality



Dashboards and Analytics:
Visualise insights to track legal service request across the business.



Seamless Deployment:
Easily embed the solution into existing intranet portals using Protected URL deployment.



Integrations:
Seamless flow through to internal solutions (e.g. knowledge base) and external systems (e.g. matter management system).



Email Notification:
Notify practice areas when legal request needs to be escalated to the legal team.



Form Capture:
Interactive input fields to capture legal request information.



Decision Tree Logic:
Direct the business to the relevant practice area based on pre-determined business rules.



Single Sign On:
Secure access to automated solutions using centralised login system.

SUCCESS STORY

One of Australia's Largest Telco was challenged with managing legal services request 25,000+ employee base with a legal team of ~200. The resource constrained legal team were looking at ways to centralize legal service requests and increase visibility of the nature of these requests to better deliver legal services to the business.

After partnering with Checkbox, in just 8 weeks, the company was able to quickly develop a digital front door to centralize and triage legal services requests across their business and help their legal team focus on high value strategic work, whilst automating away the low value, repetitive manual work.

IMPACT

- ✓ 13,000 requests funneled through in 9 months
- ✓ Saved roughly 6,500~13,000 hours legal team time
- ✓ Application went from idea to deployment in just 8 weeks



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Document Automation

BUSINESS BACKGROUND

For most legal teams, generating documents for the business is a time consuming, high volume, low value manual process. On top of simply generating the document, there is often a time consuming back-and-forth with the business to understand context and follow up on missing contract information.

For some legal teams, master document templates do not exist, and each request for a contract is manual task that draws them away from high value strategic work.

For other legal teams, making their master template easily accessible for the business is a challenge, and often, the business either reverts to re-using contracts which may not be compliant, or requesting help from the legal team.

Additionally, the signing of contracts is often manually executed by the business with their clients and the storage of signed contracts is not centralized.

TYPES OF CONTRACTS THAT DOCUMENT AUTOMATION CAN BE APPLIED TO:

1. NDA
2. Supply Agreements
3. Master Consultancy Service Agreements
4. Technology Trial Agreements
5. Talent Release Agreements



HOW CHECKBOX SOLUTION SOLVES FOR THIS

Checkbox enables empowers legal teams to design Document Automation Solutions that enable the business to self-service their document.

The digitized solutions make it easy for the business to input contract information that dynamically populates an underlying master template, inserting and removing conditional clauses and adjusting numbering.

For any contracts the Solutions identify as exceeding a threshold, whether it be contract amount or risk, automatically notify the relevant stakeholders as part of the delegation of authority process.

Once the contract is ready to sign, out-of-the-box e-signature integrations allow contracts to be digitally signed and forwarded to the legal team's document storage system of choice.

Key Benefits



Accelerated turn around time for the business:

The business can self-service low risk contracts (e.g. NDAs)



Reduced manual work performed by the legal team:

The legal team can automate away low value manual contract population and focus on high value strategic work.



Compliant By Design:

Using an underlying master template that dynamically changes based on user inputs and business logic makes the contracts compliant by design.



Seamless digital experience:

From the generation through to e-signature, the entire document



Key Functionality



Data Capture by Smart Form:

Capture contract information via interactive smart forms.



Decision Tree Logic:

Direct the business to the relevant practice area based on pre-determined business rules.



Complex Dynamic Document Generation:
Adapts the document based on user inputs, including conditional clauses and numbering.



E-signature end-to-end user journey:

Integrated e-signature and delivery of contracts.



Integrations:

Seamless connections to external storage systems (e.g. DMS/CMS).



Dashboards and Analytics:

Seamless flow through to Visualize insights to track legal service request across the business.

SUCCESS STORY: CCA

Coca-Cola Amatil found that their teams dealt with numerous manual tasks and processes as part of their day-to-day operations, including the population and drafting of documents, approval workflows and inter-department communications. With the IT team focused on supporting core business functions such as sales and finance, automating these particular kinds of workflows was not high on the priority list. As such, teams were left to continue doing work manually or work with legacy software or external vendors, which often came with high costs and dependency on expertise and knowledge outside of the organization.

Checkbox enabled Coca-Cola Amatil business users to build a universe of business applications without the need to learn coding or rely on external vendors.

Although Coca-Cola Amatil was initially looking for document automation tools, they realized that document automation is only a small part of a larger end-to-end business process.



Checkbox was highly attractive because it allowed them to automate not only the document aspect, but also the larger business process that crosses functions and departments if they wished, or the scope anywhere in between.

IMPACT

- ✓ 1,000+ documents generated
- ✓ Saved roughly 1,000~2,000 hours of legal time
- ✓ Application went from idea to deployment in just 3 weeks

“We have automated NDAs so that 90% are created automatically by the user without legal intervention. The 10% that require legal intervention are completed in hours rather than days.”

- Richard Conway, Deputy Group General Counsel & Group Company Secretary

3 Review and Approval Processes

BUSINESS BACKGROUND

Today, businesses are faced with the challenge of operationalizing approval and review processes and ensuring they are followed by the business.

Processes that require approval and/or reviews often involve multiple stakeholders across multiple vertical authority tiers and are poorly mapped.

With the business often left to interpret the approval process, many business users simply escalate to legal to help navigate through the process, resulting in a frustrating experience for the business user, and time spent legal manually assisting in a process that is already mapped out.



HOW CHECKBOX SOLUTION SOLVES FOR THIS

Checkbox's Approval and Review Solution helps legal teams rapidly develop and operationalize their processes and build out a fully digital business solution that enables business users to navigate the appropriate review and approval processes.

Using Checkbox, legal teams can rapidly design deploy and end-to-end workflow that prompt business users to provide appropriate reviewable input information as well as upload documents for review.

Pre-determined thresholds, such as risk or financial thresholds, trigger workflows that notify the appropriate stakeholders to review and approve the business query, or if appropriate, send back to the original requestor with comments around amendments.

Key Benefits



Accelerated turn around time for the business:

The business can self-service low risk contracts (e.g. NDAs)



Reduced manual work performed by the legal team:

The legal team can automate away low value manual contract population and focus on high value strategic work.



Minimized risk through digital operationalization of business processes:

Align the organization on how processes should be executed by providing a digital solution that facilitates the journey.



Key Functionality



Data Capture by Smart Form:

Capture contract information via interactive smart forms.



Decision Tree Logic:

Direct the business to the relevant practice area based on pre-determined business rules.



Digital Workflows:

End-to-end digital process with limited human intervention which facilitates back-and-forth flow of files.



File Upload:

Attach relevant documents as part of the approval process.



E-signature end-to-end user journey:

Integrated e-signature and delivery of contracts.



Integrations:

Seamless connections to external storage systems (e.g. DMS/CMS).



Dashboards and Analytics:

Visualize insights to track legal service request across the business.

SUCCESS STORY: HESTA

A top-15 superannuation fund managing ~\$50 billion in member assets was looking at ways to digitize their ad hoc manual procurement process which was inefficient and high overhead for the legal team to manage.

Using Checkbox, the super fund was able to digitize their complex procurement process end-to-end in just 12 weeks. The solution is able to collect information and triage the procurement request to the appropriate approver to ensure the procurement process was executed smoothly. It also generates documents, like an NDA, as part of the process and integrates into the CRM where suppliers are managed.

IMPACT

- ✓ 2,000+ procurements processed per year
- ✓ 200+ users had their procurement digitally processed
- ✓ Application went from requirements to deployment in just 12 weeks





Checkbox as a No Code Platform

Simple yet powerful platform. A full suite of no-code app development features on a single platform.

The in-house legal teams of tomorrow will be teams that leverage new technology to help them do more with less. With no-code legal teams are able to build solutions that automate away low value manual work and enable them to focus on high value strategic work.

CHECKBOX FUNCTIONALITY

That's why many innovative legal teams are partnering with Checkbox, the world's most elegant no-code platform that empowers lawyers to rapidly design and deploy automation solutions that are highly contextual to the business.

Checkbox offers a wide range of lego blocks that can be drag-and-dropped to represent application functionality. This includes smart form based data capture, complex document generation, end-to-end document execution capability, workflows (including complex parallel workflow), data driven dashboards, and enterprise system integrations.

This is all provided on the one no-code platform so legal teams don't need to adopt multiple solutions. This also enables teams to generate high return on investment by being able to address a wide range of use cases.



Checkbox Benefits

1

High ROI – Address wide range of use cases using one no-code technology platform:

With no-code platforms, legal teams can address a wide range of use cases all in one technology.

2

Rapidly build and deploy no-code solutions that are highly contextual to the business:

Using drag-and-drop, no-code platforms enable legal teams to customize their application to meet the needs of their internal business processes.

3

High maintainability of software:

Processes are constantly changing and being updated. No-code puts the power of amendments back into the hands of experts to help keep their applications relevant to the business.

4

Enterprise Grade SaaS Security:

Checkbox is SOC2 Type II certified and maintains high levels of security as a cloud vendor.

Want to find out how no-code can accelerate transformation in your organization?

We'd love to get in touch and have a chat – schedule a demonstration with our team [now](#).

