



Best practices in legal operations

 Bigle Legal

Introduction

Legal operations are a fundamental part of a company's activity. The legal team is in charge of supervising these operations and carrying them out in the safest and most efficient way possible, with the ultimate goal of safeguarding the well-being of the company and favouring its growth.

But today's fast-paced business environment imposes a frenetic pace on companies, which seek immediate results and the perfect machine, but **often relegate legal operations to the background**. These often turn into slow and inefficient processes that weigh down other departments and slow down decision making.

This ebook looks at six best practices that companies can implement through their legal departments to implement technology and boost legal operations. Thanks to technologies such as Contract Lifecycle Management (CLM), legal teams can modernise their processes and adapt them to make them safer and put an end once and for all to bottlenecks when something goes through the legal department.





Step 1

**Centralise knowledge:
contracts are always up to date
with the law**



The traditional way of working in legal departments, with conventional templates stored in text documents, such as Microsoft Word records, and distributed to other departments lacking legal expertise, makes modifying or correcting a simple clause a task of hours, if not days. You have to change the clause one by one in each template, get it to the departments that will use it and, above all, make sure that they will delete the outdated template from their computer - a virtually impossible task.

A contract that does not comply with the regulations or that is used to agree conditions that are beyond the company's control poses a serious risk to the company. Proper drafting of legal documents and compliance with regulations are crucial for companies,

as failure to comply with current regulations exposes them to serious dangers, such as fines or penalties running into millions of dollars.

Applied to the fact that we live in an increasingly regulated world, in which frequent changes are necessary, however small, there is evidence of increased exposure to legal contingency risk in companies that do not have a system in place so that only the legal department can modify or authorise a change to contract templates.

Mitigation of errors in legal operations

One of the main objectives of the legal areas is to avoid massive document review processes and to ensure that contracts are made within the margins of the law.

Technology brings control over the process: the legal area can analyse the types of templates used in the company and turn them into an intelligent form with the no-code technology provided by the Document Automation module of a Contract Lifecycle Management (CLM). It has them centrally available in the cloud

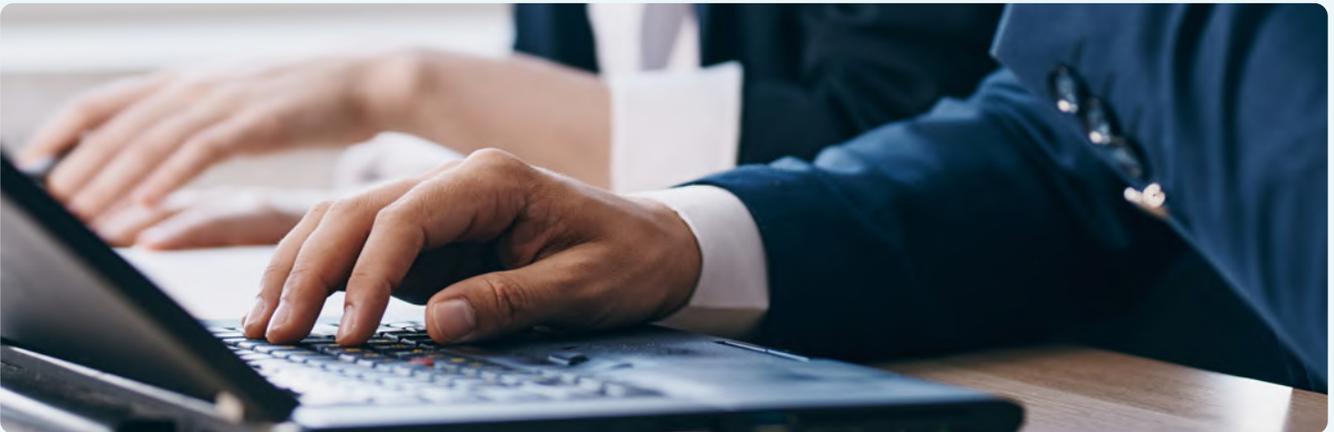
and employees who need to create contracts only have to fill in a simple form with all the options previously arranged by the legal department. In one click, they have a tailor-made contract with the full assurance that it meets with the standards set by the legal counsel.



EXAMPLE:

Problem

A **data protection clause** is a type of clause that changes frequently and is used in a very large number of contract templates. Lawyers have a duty to update it to keep up to date with current data protection legislation.



Solution

The CLM allows the use of a clause repository (known as sub-templates) to modify the data protection clause and it will automatically be updated in all templates containing the clause. Thanks to document automation, the in-house lawyer can modify all templates at the same time, replacing old clauses with new ones in a matter of seconds.

Benefits

- ✓ Keep all your company's contract templates up to date.
- ✓ Prevent your company's users from using outdated templates.
- ✓ Only you or the users you assign as responsible will have access to edit and maintain the templates, to ensure 100% centralised and up-to-date knowledge.



Step 2

Decentralise the creation of documents: avoid acts of faith on contracts



The legal director of any company has templates that he/she distributes to other departments such as sales, human resources, production, etc. so that they can create legal documents such as NDA's, commercial proposals with clients, agreements with suppliers, etc. The problem is that these departments create the legal document by copying and pasting the previously provided template into Word, but it is then up to the legal team to review its correctness and clauses point by point.

In this traditional system, three models of review are carried out:

1. Complete review.

It requires a battalion of lawyers who only review 100% of the contracts that are signed by the organisation. On the one hand, it generates cost problems and, on the other hand, a great demotivation of the lawyers due to the task itself. **There is an exposure to risk**, as email is used as a communication system and a funnel is generated that can leave critical issues unaddressed as a priority. The system often delays the company's activity by several weeks or even months.

2. Filtering by importance.

The department filters the contracts and reviews the most sensitive or the ones with the highest value, because the high volume of work means that it does not get to review all of them. The problem in the previous case is reduced, but the legal risks are greatly increased, since a large volume of contracts is no longer reviewed in detail.

3. Absence of review.

There are even cases where contracts are not reviewed. In-house lawyers are so busy that they do not even review the contracts and decide to make leaps of faith on them, which increases the risks exponentially: **legal contingencies arise from many avenues** and risks such as sanctions and fines increase exponentially.

EXAMPLE:

Problem

Companies usually have a large number of contracts with customers or suppliers. The representatives of the sales team are creative: often work on commission and aim to close deals at all costs, sometimes bypassing the legal and compliance team, **agreeing clauses that are not allowed and may put the company at risk.**



Solution

What does CLM technology enable? Use document automation to standardise the creation of contracts. Users in each department will be able to create contracts by simply filling in a form, regardless of the complexity of the contract. Easy and intuitive. Thus, a self-service service on legal documents is established.

Technology makes it possible to standardise contracts so that the legal department can be sure that they are perfect and in-house lawyers can spend their time on value-added tasks that have to do with the business strategy.



Benefits

- ✓ By decentralising the contract creation process with the CLM and avoiding review processes, any possibility of risks arising from human error in contract drafting is eliminated.
- ✓ Companies gain in **efficiency** as contracts are created faster and without errors.
- ✓ It **avoids frustrating** lawyers with a lengthy and massive validation process.
- ✓ Paper and printer costs related to document review and validation processes are eliminated and the company's carbon footprint is reduced.



Step 3

Lead cultural change



The head of the legal department is amazed at the possibilities offered by technology. He knows that it pays off, that processes will be more efficient and less risky, but he has an obstacle in mind: certain processes in the company need to be changed. At this point, it should always be kept in mind that **a small change in the present can make a difference and lead to successes in the years to come.**

Let's look at three ways of implementing this change and see which is in the best interest of each company.

Type of cultural change	Effectiveness	Works best in	Speed
For compliance	High	Large organisations or teams with a low innovative culture	Short-term
Leadership	Medium	Mixed-age staff with an innovative culture	Medium-term
Spontaneous	Low	Young staff or teams with a strong innovation culture	Long-term

The implementation of the new technological process will be more or less fast depending on how it is managed. The "compliance" and "leadership" types of cultural change exemplify two valid ways to make that change as soon as possible. But, in any case, a small adaptation process must be carried out so that it does not cause a shock for the teams.

From the decision-making team's point of view, the ideal way to carry out the implementation of legal technology is as follows:

- 1. Find a small group of tech-savvy or technologically inclined people and explain the new process to them.**
- 2. From there, this change of mentality and the advantages of the new process are extended to the rest of the staff. They must be properly informed and the benefits of the new working methods must be explained.**
- 3. Establish a support service, which receives queries and incidents, and carry out training to educate the different teams on what they need.**

At Bigle Legal, we have a Legal Project Management team to help companies implement CLM in their organisations, with turnkey projects and 100% successful implementation.

We accompany our clients in the preparation stage of their platform: customisation with their corporate image, template automation, metadata definition, design of flows, assignment of permissions and connection via API to third party applications, among others.

When the platform is ready to be used, we continue to provide support, **with training for different profiles and our continuous user support service**, to ensure a successful implementation in the organisation.





Step 4

Control your contract events

The fourth fundamental pillar offered by CLM software is **control over the company's contractual obligations and risks**. Mastering contractual processes and events has never been easier.

Different actors, departments and even third parties outside the organisation are involved in the document process. **Thanks to CLM, control over the processes is assured**, as access to contracts is maintained only for those people that the legal team considers necessary, from a single platform. The same goes for collaboration and signature, which are managed from the same platform through

fully customisable permissions. But the process does not end once the contract is signed.

After weeks, months or years, contracts need to be reviewed, renewed, updated or terminated. For this purpose, **an in-house lawyer can create different alarms**, depending on the type of contractual event that must occur in the future, **a payment obligation, an automatic renewal of a contract, a periodic review of the conditions, etc.**



EXAMPLE:

Problem

- A contract that, for not remembering its **expiry date**, is automatically renewed, even though it is not the company's intention to continue with the service.
- The need to **respond to an injunction within a specific time limit** but to forget about it, completely losing the case.
- The existence of a legal deadline for signing at the notary's office, but **the lawyer misses it and loses a deposit**, for example.

These are mistakes that lead to serious problems for companies and are common in the daily grind of legal departments.



Solution

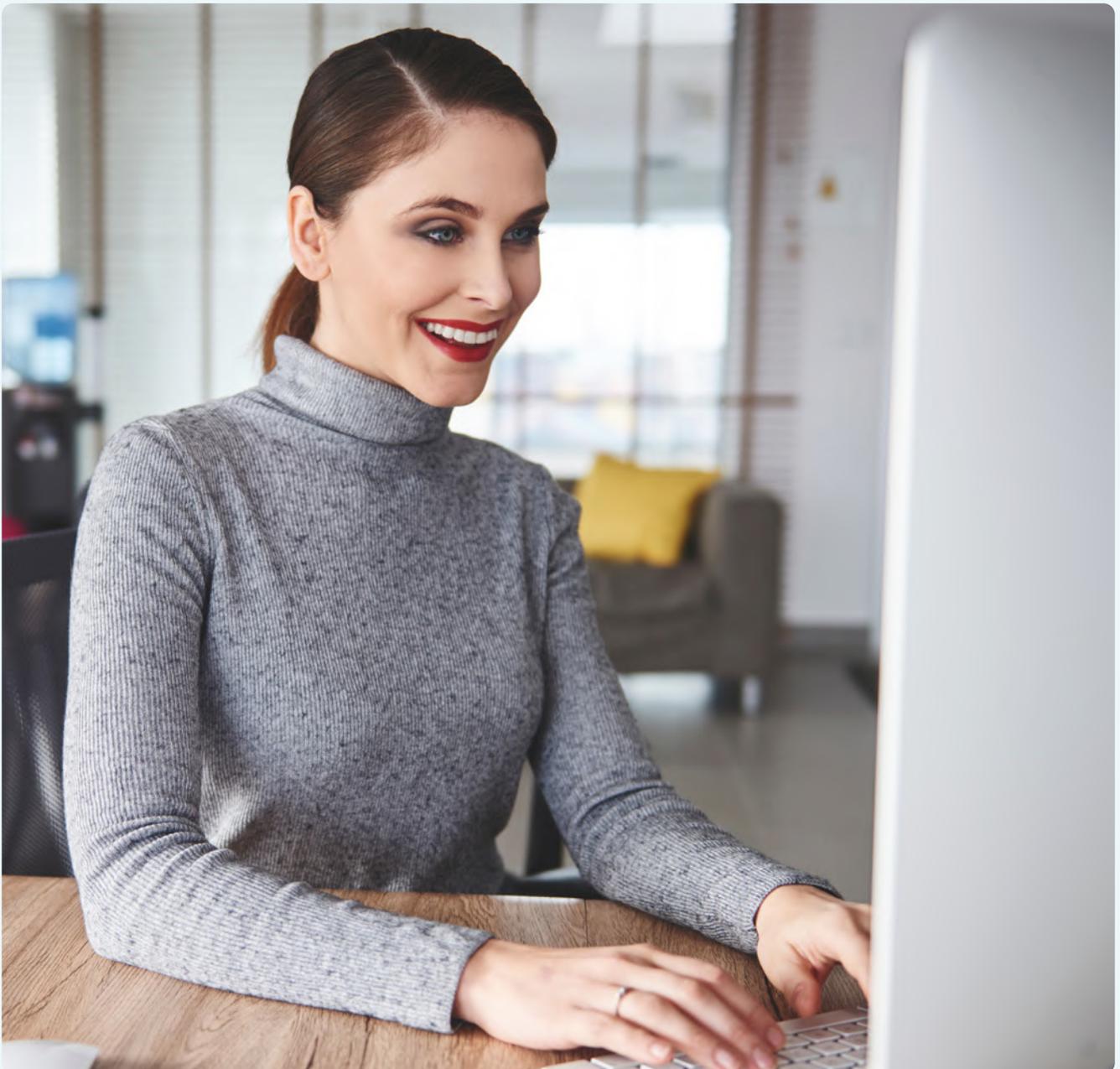
Thanks to CLM, the status of each document (e.g. pending validation, sent for signature, signed, pending renewal, etc.) is visualised at a glance and alerts are used to help our future selves.

Thanks to a control panel with a filtering system, we can see which alerts will be notified to us in the coming weeks, months, etc. Which contracts are due? Which ones need to be reviewed? And extract reports in such a way that everything will be linked and without any loose ends.

Benefits

Set reminders about all types of contracts or legal documents, which will get your department out of trouble. Some examples of contract alerts:

- ✓ **Deadline for signature before a notary.**
- ✓ **Automatic renewal of a contract.**
- ✓ **Delivery of goods.**
- ✓ **Delivery of money.**



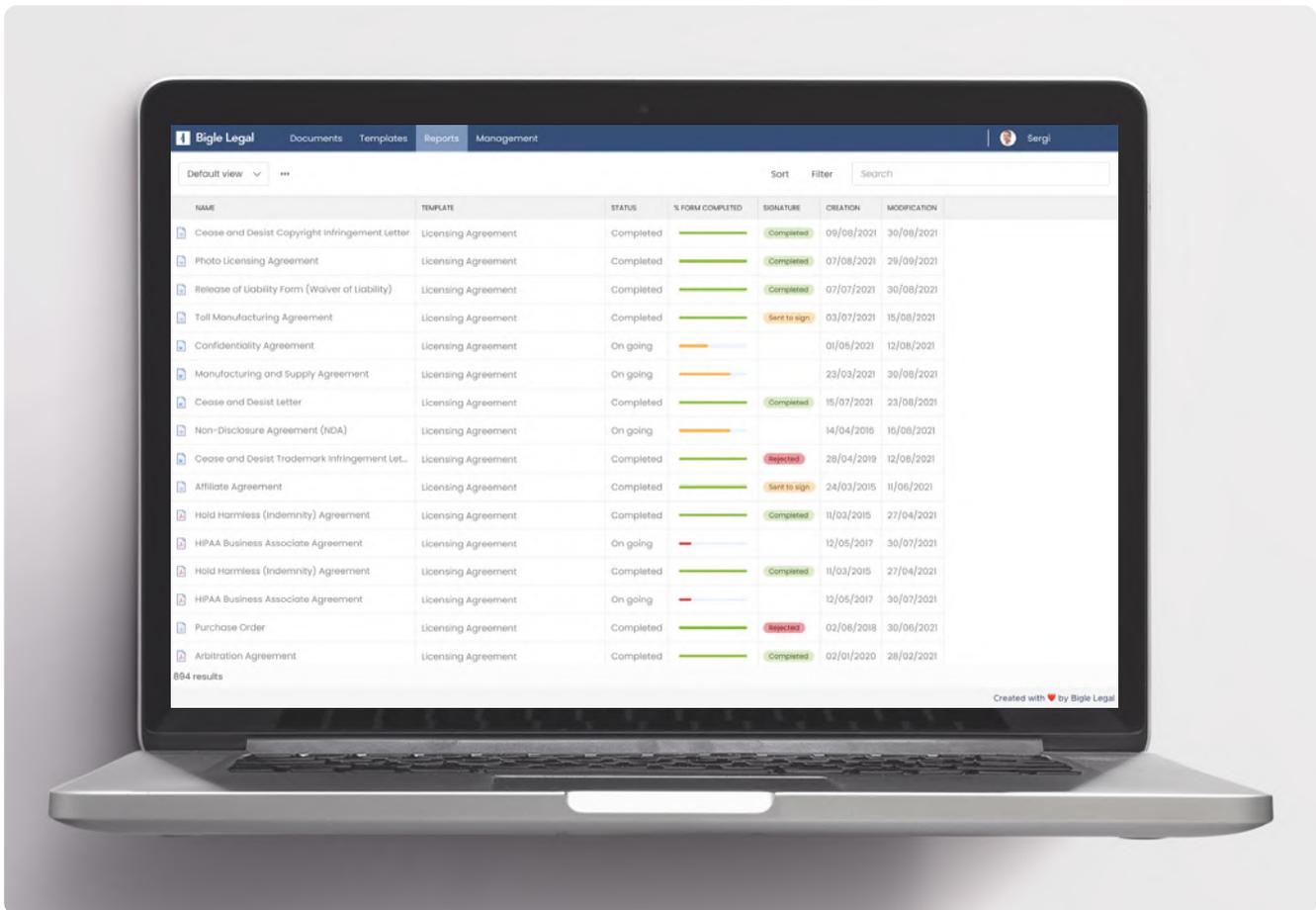


Step 5

Follow up on live contracts

The legal team can now find these contracts not only by the name of the file but also by its metadata -such as the name of the creator, the status of the document, pending signature, signed, etc.- and also by the content of the contract itself -addresses, amounts, names and surnames, etc. -.

As with the control of contractual events, the contract management provided by a view panel in a **CLM** allows you to find and filter them in order to know where the documents are at any given moment.



Overview of the Bigle Legal platform's reporting module

Under negotiation	Sent to sign	Signed
AJST Services Contract	Confidentiality Agreement Blue Ocean Project	Confidentiality Agreement IAA project
Bora Bora Fincas Service Contract	Employment contracts Consumer goods market	Confidentiality Agreement Coffee Beans Limited project
Contract International Business Services SL	Confidentiality agreement Private banking project	Green Turbines Service Contract



Step 6

Connect your databases



Corporations work with different types of **software**: collaboration, task organisation, CRM... and they use databases that **they have implemented for years**, in which they already have a lot of information stored.

Thanks to the API, the Application Programming Interface, it is possible to integrate different software with the CLM solution in order to unify tools and work in the most coordinated way possible. In particular, unifying databases is a very interesting function regarding contracts. Using the data repository is used to draw up lists of customers, suppliers, company representatives, real estate assets...

This integration of databases makes it **possible for users not to have to type the same information twice, avoids duplications and errors arising from them**. In the same way, all information is kept up to date in a single place to avoid errors in the transfer of information or out-of-date elements. In short, a very important saving of time and errors for companies.

EXAMPLE:

Problem

When drafting a contract, the attorney-in-fact signing on behalf of the company may change. In that case, the change must be made in the contract itself and in different parts, but the outdated representative remains in the main database, so that **duplication of information can occur and lead to errors.**



Solution

A complete CLM software allows to make the change and include the new information to be included in one place, so that it is updated instantly in all document templates that include it.

Benefits

- ✓ Save time and errors in documentation.
- ✓ Get a robust, unified database in a single cloud solution.
- ✓ Retrieve data from previous contracts at the click of a button, without the need to retype all the information again.

Advice from legal operations experts

Having well-defined operations and investing heavily to keep the business flowing and efficient is critical to achieving a great product. However, many companies have slow and insecure legal operations.

It is contradictory for companies to improve their services, processes and products but neglect boosting legal operations because most strategic decisions depend on these.



By contrast, **agile and digitised legal operations give companies a competitive advantage**. It means having a team that is not only able to cope with a high volume of work thanks to automation, but can take their minds off repetitive day-to-day tasks and focus on supporting the business on key strategic issues.

Companies that make the step towards change will have a huge competitive advantage, will be healthier and will overtake the competition on the right.



About Bigle Legal

Bigle Legal is a **Contract Lifecycle Management Software**, provides an AI-powered, cloud-based solution that automates the legal operations of a company while improving safety and minimizing the risk of legal contingencies.

A pioneer tech company and leader in the field of document automation from **Spain, with a presence in the UK, Austria, Netherlands and Italy**, and **has a network reseller across Europe and Latin America**.

Its clients include real estate companies, corporations, and large law firms. The platform is precise, flexible, and intuitive, providing full control over the entire document lifecycle.

To find out more about Bigle Legal, visit their website, <https://www.biglelegal.com/> and contact the team on their [LinkedIn](#) and [Twitter](#) social media channels.

By using Bigle Legal, you contribute to saving natural resources



323 million
Kg of wood



7.1 billion
Litres of water



725 million
Kg of CO2



47 million
Kg of waste