No-code for in-house teams

9 solutions for GCs navigating rapid growth

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Foreword

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No matter what their size, one of the highest value-add actions legal departments can and should take today is to implement a scalable, flexible, no-code workflow management solution to drive business enablement and efficiency for the enterprises they serve.

The smartest GCs and legal management teams recognize that in prioritizing workflow implementation over other costly and complicated projects (think CLM and e-billing implementation headaches!), they are not only establishing a critical foundation to address immediate and persistent legal pain points, such as request intake management, self-service contracting enablement within guardrails, and policy and process FAQ management, but they are delivering solutions which can be broadly adopted by all of their partners across the organization.

The ROI from workflow management tools is well-established and indisputable, road-tested and foundational in the enterprise toolkit; these tools deliver time and bandwidth back to stretched departments, unburdening team members, and allowing them to focus on higher-value work, automate processes which no longer need to be run manually, and shorten timelines to get to results.

There is nothing specific to legal about workflow management tools; they can immediately bring value to the entire company, so when you partner with IT, Finance, HR, and business partners to drive enterprise-wide solutions, you will be an efficiency hero (and they'll probably split the cost with you, too).

It's another way for legal to take a seat at the table, as a true partner to the business.

Brian Hupp

Senior Strategist and Legal Operations Consultant, UpLevel Ops
Former Head of Legal Operations, Facebook
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Introduction

In-house teams are struggling. They must support and keep pace with rapid growth, while navigating an increasingly complex legal and regulatory environment. Unfortunately, there is no easy fix.

But, there is light on the horizon! GCs, corporate counsel and legal operations professionals now have access to more and better tools than ever, including no-code automation. In-house teams no longer need to wait for big budgets or capacity from IT to implement automation projects.

By creating no-code apps and bots, non-technical people can automate lower-level repetitive tasks like collecting instructions from clients, generating common documents, and answering frequently asked questions.

This white paper will guide in-house teams at tech companies through their unique challenges and solutions. It was created by Josef, a legal automation platform used by some of the best in-house teams in the world, and a group of leading legal operations experts.

Josef is distinguished by its ease-of-use, empowering in-house teams to automate simple documents and workflows in a matter of hours. For many customers, the journey from initial training to launch is as short as a few weeks. Ready to learn how your team can use no-code solutions to transform the way you work?

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Tech sector: Special report

Challenges facing legal teams in the tech sector

What does rapid growth mean for in-house legal teams in tech?

Growth in the tech sector is accelerating due, in part, to the rapid remote work requirements necessitated by the global pandemic. This has pushed every sector of society to embrace working online, and, in many cases, proved the catalyst for big business to move to cloud technology en masse, rather than piecemeal.

$308.5

billion in 2021

Deloitte's forecast revenue from global public cloud services[1]

US$5

trillion

Expected value of global tech industry in 2021[2]

Technology uptake across every industry has seen the value of the tech sector rise throughout COVID, with Deloitte projecting an expected value of USD 5 trillion in 2021. Over a third of this market share comes from North America, followed by Asia.

Percentage of market share from **North America**[3]

33%

North America
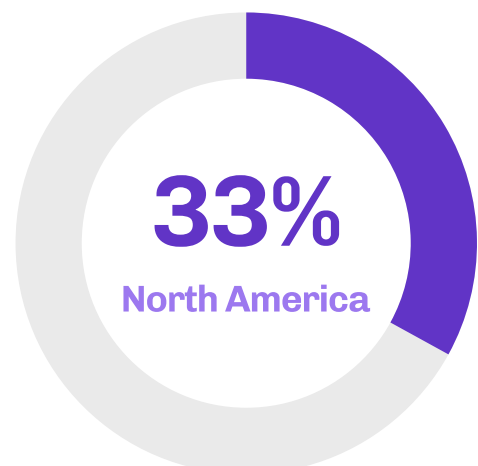
Software and tech budgets have increased in line with this growth, with Forrester projecting US software spend to accelerate to 10% in 2021, rising to 11% in 2022. Similarly, tech budgets are forecast to expand to 7.4% in 2021, with a mild decline to 6.7% in 2022.

+10%

US software spending to accelerate by 10% in 2021

Forrester projects this to increase to 11% in 2022[4]

+7.4%

US tech budgets will expand by 7.4% in 2021

Forrester projects this to increase to 6.7% in 2022[5]

For in-house legal teams advising tech startups and scale-ups, rapid growth presents its own set of unique compliance challenges.

Heightened risk management & compliance burdens

Companies in the tech sector make it their mission to grow rapidly, often experimenting with new products or new markets. Rapid growth, and an experimental mindset, can reap strong rewards in tech, but they can also exponentially increase risk and compliance requirements.

New markets, particularly in different countries, may pose specific compliance burdens. The GDPR is a recent example of this.

The introduction of the European Union's General Data Protection Regulation ('GDPR') impacted not only EU organizations, but any organization dealing with the EU. This had far reaching impacts on tech companies which service the EU.

Much of this compliance impact landed with in-house legal teams, who rushed to help their organizations comply with their risk management, privacy and data security obligations under the GDPR, alongside other statutory and jurisdictional requirements. However, many organizations are still encumbered by temporary controls and manual processes for their GDPR compliance, according to McKinsey's research.[6]

Up to 50% of companies use temporary manual processes to comply with the GDPR

McKinsey research reflects few companies feel fully compliant and would benefit from automated compliance processes.

The cost of failure is high.

US$4.24
million
is the average cost
of a data breach
in 2021

This is the highest figure in the 17 year history of IBM's reporting.

The majority of these data breaches were caused by compromised credentials, which comprised 20% of all breaches, at an average breach cost of USD 4.37m.

In-house legal teams are under more pressure than ever to ensure GDPR compliance and work with security teams to minimise the cost of a data breach.

How can no-code automation assist?

No-code legal bots can help organizations comply with obligations like Article 30 of the GDPR, which requires businesses to record processing activities that use personal data.

In-house legal teams can build their own legal bots to automate these surveys, and run them regularly, organization-wide. McKinsey recently identified this as a key automation opportunity.[7]

Review a similar application: Learn how US law firm Arent Fox recently deployed Josef legal bots to automate a client's US State Department global audit, which required interviews with 600 employees across 17 sites in the US, Europe, Australia, and South America.

Increased data security breaches caused by remote work

Data security has always been a concern for organizations, regardless of their size. However, when COVID-19 forced a swift, and often chaotic, shift to home-based work, data security breaches rose sharply. Weaknesses were quickly exposed.

According to IBM's Cost of a Data Breach Report 2021, the average cost of a data breach was USD 1.07m higher in breaches where remote work played a factor in causing the breach.[8] Safeguarding an organization's data security is an essential component of any good risk management plan. As remote work continues, prioritizing strong data security is vital.

However, many organizations lack any consistent security plans governing data security and remote work. Indeed, almost three quarters of organizations surveyed by IBM report ad-hoc, inconsistent or non-existent security plans.

74%
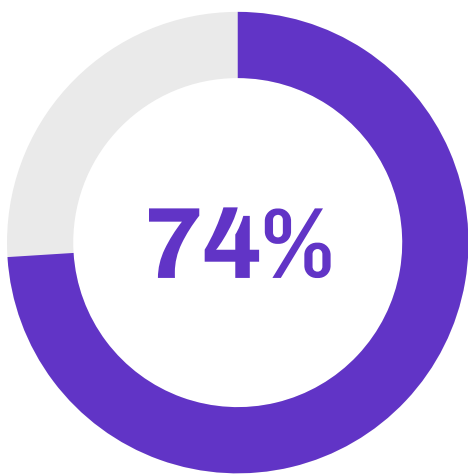
74% organizations report ad-hoc, inconsistent or non-existent security plans

According to an IBM survey of security and IT professionals [9]

How can no-code technology assist?

Legal teams can ensure consistent compliance with data security plans through no-code bots.

Legal chatbots can easily be designed by legal teams, and deployed to internal stakeholders to gather information and sign off, and generate security documents.

Exponentially increasing emails and data messaging apps

Legal teams are constantly bombarded by emails and chats from data messaging apps. When legal teams stop to respond, this slows progress on core legal work.

However, the tech sector is powered by a 'move fast and break things' mentality. This can place pressure to rush legal work, which can lead to oversights, and incur hefty penalties.

Caught between core legal work and responding to urgent emails and chats, legal teams often don't feel they have the time to invest in technology training to improve their workflow or processes.

> ## 18% American attorneys resist technology training [10]
> According to the ABA Legal Technology Survey Report 2020

How can no-code technology assist?

Through no-code technology, legal teams can build bots to help manage the flow of new emails and data messages, as well as automate repetitive, but simple work.

Challenges facing legal teams in the tech sector

This empowers legal teams to solve their increased workflow with tech they can build themselves, with minimal training.

> **Josef's good for us because it's a no-code platform, we're able to do these iterations and constantly be improving things and adding extra things. We don't have a dedicated IT team that we can go to and get them to code new features.**
>
> **— George Fellows**
> **Legal Associate at Fnatic**

It also means they can adapt technology to new use cases as needed. Fnatic, for example, is **managing risk** through an anonymous whistleblowing bot, and exploring a bot to safeguard minors in their interactions with adults in the esports world.

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**In-house legal:
Challenges & solutions**

What are the broader challenges faced by in-house legal teams?

Pressure to do more with less is mounting for many in-house legal teams, which are often viewed more as cost center than sources of value to the business.

A more demanding workload against flat budgets and same-size teams

In-house legal teams in every industry are managing more work than ever. Few are seeing significant increases in their budget or head count, which is driving GCs to seek out more creative solutions to boost productivity, team morale and performance.

The 2021 EY Law Survey revealed that General Counsel expect their workloads to increase by 25% over the next 3 years.[11] Teams, however, are expected to remain fairly static, with a projected headcount increase of only 3% over the same 3 year period.[12]

+25%
GCs predict workload to increase by 25%
Over the next 3 years, as per the 2021 EY Law Survey

+3%
Legal headcount to increase by only 3%
Over the next 3 years, as per the 2021 EY Law Survey

This disconnect between higher workloads and headcount may reflect why 76% of in-house law departments predict they will find it challenging to manage their workload in the coming years.

Low-complexity work impacting employee morale & client satisfaction

While workloads are increasing, low-complexity work remains a stubbornly persistent feature of what legal teams do.

This impacts the team morale of in-house attorneys and legal professionals. It's a lose-lose situation, as it also means the organizations that employ them are effectively paying a premium for highly skilled attorneys to do junior work.

Overworked, unhappy, and time-poor in-house attorneys are in a suboptimal position to deliver legal services likely to satisfy internal clients.

This experience is borne by the data. One in five in-house counsel hours are presently expended on low-complexity, repetitive or routine tasks.

According to 87% of the law department leaders surveyed, unrewarding and repetitive work comprised far too much of their team's workload, hindering team productivity, happiness, and client satisfaction.

Employee morale takes a hit too, with 47% of law department leaders reporting that higher volumes of low-complexity work adversely impacts the morale of their teams.

How can no-code technology assist?

By deploying a self-service portal to collect information and automate documents, the legal team at Fnatic won back one day a week.

100%

Fnatic staff agreed that its in-house team delivers outstanding work

Fnatic's legal team ranked as its happiest department in 2020. Staff were happy too – 100% said they strongly agree or agree that the in-house team delivers outstanding work.

Using data and reporting to help shift C-Suite's perceptions of GCs – from roadblocks, to partners and strategists

"There is often a lack of data to help GCs make data-driven decisions," observed **Stephanie Corey**, Co-Founder and General Partner of UpLevelOps, a specialist consultancy servicing in-house legal departments and law firms.

"Reporting can also show the value Legal is providing to the company," said Stephanie.

"Once the GC or legal operations lead can run reports or display a dashboard to show what kind of work is happening in the department, it's a lot easier to start dividing that work up into what should be done in-house," explained Stephanie.

"Reporting also helps to identify low-risk/high-volume work to send to ALSPs (alternative legal service providers), freeing up the in-house attorneys," said Stephanie. "It can also inform what work should be automated, through, for example, bots, and what work should be sent to outside counsel. In fact, it's likely work sent to outside counsel would be reduced through data-driven reporting and matter management."

How can no-code platforms assist?

Randstad's General Counsel needed a no-code platform to create

bots which could onboard new clients, empowering salespeople to pick and mix their own legal terms from a set list of options.

> **Bots saved 1 hour per contract. Amounted to over 100 hours per year.**

The bots saved one hour per contract, amounting to over 100 hours per year. These dramatic results allowed Randstad's legal team to clearly demonstrate, through data, their value.

Here's how the legal team became known as innovation leaders >

Over-reliance on an individual's 'institutional knowledge', particularly with remote teams

Many organizations lack good knowledge management systems to store 'institutional knowledge' – i.e. internal processes such as signing new clients or customers, issuing binding agreements, and obtaining signatures.

Often, this can lead to an over-reliance on an individual team member who has, through seniority, navigated organizational systems frequently enough to be the de facto repository of knowledge.

Switching to a remote workforce disrupted this approach, and highlighted the need to standardize and store institutional knowledge.

How can no-code technology assist?

No-code technology can help to gather and document institutional knowledge, and avoid this kind of dependence on individuals.

> # We are not roadblocks. We are helping you drive the train.
>
> **– Sidney Kerley**
> **Executive Vice President and Chief Legal Officer and Secretary of Insurance Auto Auction**

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In-house legal:
Challenges & solutions

Four ways no-code solutions help GCs & in-house legal teams

In-house legal teams are under pressure to be more efficient, and deliver legal services 'on-demand', in line with internal client expectations. Here are four ways no-code solutions can help.

1. From cost center to breadwinner: Leverage automation to close deals faster

Through technology and automation, in-house legal teams can save time and money by operating more efficiently. But, even more than that, by automating lower level work, they have more time to spend on high-value and strategic work which, at present, is outsourced to external counsel. In circumstances where 61% of the in-house team's budget is spent on external counsel, the potential savings are significant.

61%
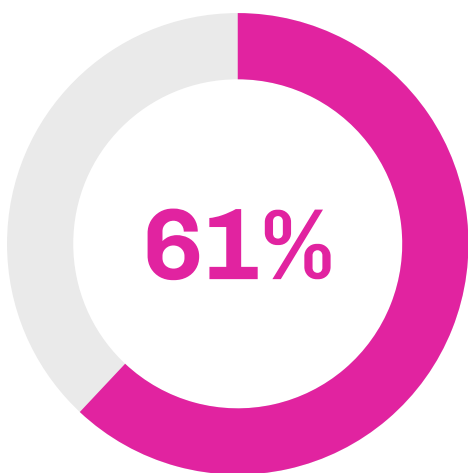
61% legal budgets go to external counsel

If low-value work is done by tech, internal counsel is free to keep work in-house

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No-code technology could empower legal teams to deliver high-value legal advice. This, in turn, could reduce spending on external counsel. However, only 5% of corporate law department budgets go towards technology.[13]

## Only 5% legal budget is currently spent on tech

Increasing tech spend empowers internal counsel to become breadwinners, providing high-value strategic legal and commercial advice.

5%
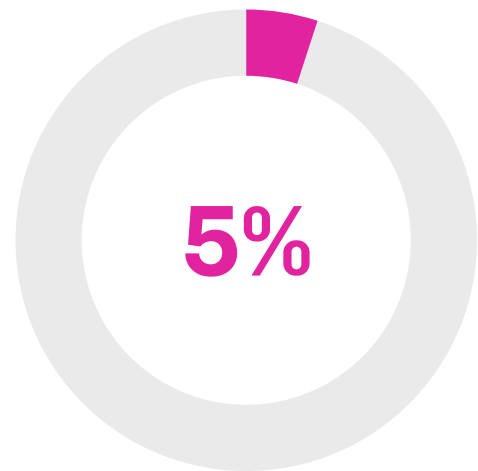
Shifting this budget breakdown could see legal departments rise from cost centers to become breadwinners in their own right, forecasting future trends based on local policy and legal shifts in different markets.

2. Better enable the business through self-service automation and FAQs

More and more legal work is being automated. Indeed, McKinsey has estimated that up to 23% of legal work can be automated.[14]

23%
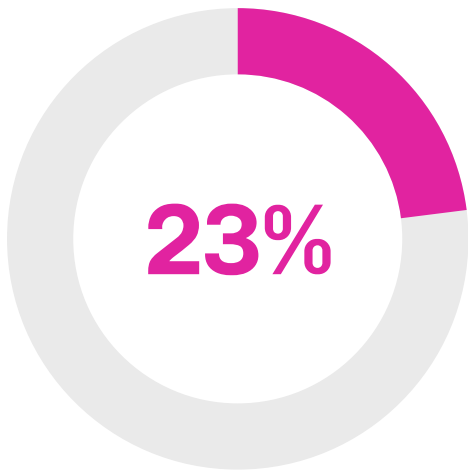
Up to to 23% of legal work can be automated – McKinsey

Attorneys are best placed to create fit-for-purpose legal bots in-house.

However, attorneys and legal operations professionals remain best placed to drive this automation revolution.

With tools like Josef, they can easily build their own bots enabling greater efficiencies within the business.

Bots can be used to facilitate self-service automation, and responding to FAQs.

Josef empowers anyone to create powerful legal bots, through its intuitive drag and drop platform. This means in-house legal teams can embrace no-code automation, delivering better efficiencies to the business, and avoiding any reliance on IT.

3. Capture metrics to know your team's true productivity and business value

It can often be difficult to identify what is keeping in-house legal teams busy. Without billable hours to time-track key tasks, legal work can appear to involve indistinguishable tasks to the non-lawyers in an organization.

This compounds an internal perception of attorneys as 'roadblocks' and 'cost centers', and makes it difficult for GCs to demonstrate the value they provide to an organization.

"By using intake and **workflow tools**, you can achieve a form of 'passive' matter management, so leaders can see what work is happening within the department," explained Stephanie Corey, Co-Founder and General Partner of UpLevelOps.

Josef's bots can be set up to allow matter **intake, triage, and self-service**, facilitating clear workflow management for legal teams. Not only does this help to make **legal teams more efficient**, it provides GCs with user-friendly reports that demonstrate the value of their legal work for an organization. At a glance, leaders – including non-lawyers – can see what work the legal team is undertaking at any given time. This kind of data can help inform more strategic decision-making by both GCs and senior management.

> **By using intake and workflow tools, you can achieve a form of 'passive' matter management, so leaders can see what work is happening within the department.**
>
> **— Stephanie Corey**
> **Co-Founder and General Partner of UpLevelOps**

4. Empowering a remote workforce through COVID & beyond

McKinsey estimates that, post-pandemic, 20 to 25 percent of the workforces in advanced economies could work from home between three to five days per week, with no meaningful loss of productivity.[15] While COVID has severely disrupted work in close contact industries like hospitality, teaching, and personal care, remote work has proved a boon for many formerly office-based workers.
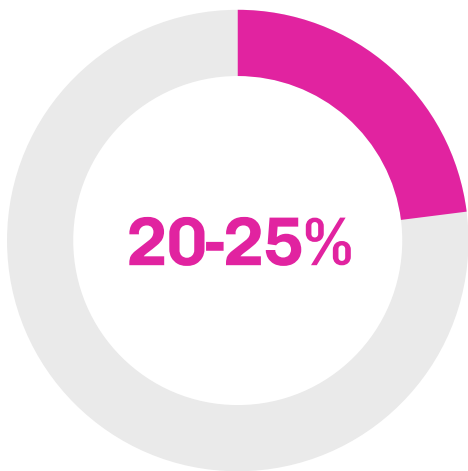
20-25%

20-25% employees will shift to 3-5 remote work days per week

Good legal technology can keep legal teams productive and morale high by automating routine, low-value tasks

For organizations, significant cost savings from reduced office rent and upkeep, alongside the productivity boom from a home office remote workforce, is likely to see remote work remain as a long-term model. McKinsey predicts this could "prompt a large change in the geography of work, as individuals and companies shift out of large cities into suburbs and small cities."[16]

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In-house legal:
Challenges & solutions

How legaltech can help: Five practical solutions

Good legal technology doesn't try to be all things to all people or problems. Rather, it meets specific needs, with a focus on empowering attorneys to automate low complexity, repetitive legal work.

Let's explore five ways in which good legal technology can help in-house legal teams.

1. Turbocharge client self-service through automated agreements

Legal teams frequently operate across multiple time zones, and are increasingly expected to provide 24/7 service wherever possible.

The legal team at Fnatic were tired of the tedious sign-off process that their agreements involved. These included employment agreements, release agreements, contracts with professional players and coaches, and manufacturing agreements.

Legal teams need to empower clients to self-service. A Josef bot can help.

Solution: Fnatic created a self-service portal featuring bots to automate the sign-off process for agreements.

Over 100 staff across 17 time zones gained access to this "self-service" option to collect information and automate legal agreements.

Empowering clients via a self-service portal can make for happier clients and legal teams.

At a glance

1
day a week
freed to focus on value-creating work

100%
customers
surveyed agree Fnatic's legal team "delivers outstanding work"

100%
customers
surveyed agree Fnatic's legal team "gives advice that solves problems"

2. Client intake & triage: Turn hundreds of emails & calls into a self-service portal

In-house legal teams are often expected to know every area of law, from every angle. Enquiries flow in from other teams throughout their organization, and almost all are urgent. Attorneys spend much of their time struggling to clarify the core problem, or confirming key facts.

Legal teams need a quick way to triage issues, deal with simple

matters through automation, and send complex issues to attorneys.

Solution: Develop a self-service portal to automate client intake and triage.

One legal team fielded over 700 calls per month. By building a Josef bot, they could automatically:

- Take down key information
- **Resolve simple queries through FAQs**
- Direct complex enquiries to internal legal teams

750
clients
served with
the bot

335
help-seekers
diverted to services
that can help them

85
hours
saved on calls

30-50%
**time saved
on the phone**

20
hours
saved on data entry

3. Deliver high-volume document automation for a superior client experience

Tired of template documents? Can't figure out which executive, board member, or manager has signed your agreement?

Attorneys need a **quick way to get signatures** for their legal documents.

Solution: Attorneys at Birchal, an equity raising platform, ditched their template documents in favor of a user-friendly conversational chatbot.

Users respond to the chatbot by providing key information and signatures.

Once conversations are complete, the bot generates a legal declaration.

This saved 15-20mins per document. Every document might require sign-off by up to eight people, and every deal would require multiple documents.

As Birchal dealt in high-volumes of legal documents, this efficiency gain was significant.

High-volume document automation can be a game changer.

At a glance

15-20
minutes
saved for each form

1
engaging bot
replacing 3 manually tailored templates

100+
hours saved
every year, at the most critical time

4. Automate answers to FAQs and policy questions

More than ever, clients expect legal advice on demand, 24/7.

How do you meet these expectations?

Attorneys at global law firm Herbert Smith Freehills (HSF) faced this issue. Changes to whistleblowing laws caused an influx of questions from senior executives and directors. Many were concerned about what to do should a whistleblowing complaint be lodged against them.

The legal team needed a quick way to respond to FAQs. The solution: a bot to automate answers, accessible by clients on demand.

Solution: Through Josef, attorneys built bots to automate guidance regarding what to do if you receive a whistleblower complaint.

At a glance

100+

clients trained
on whistleblowing

<1

hour
to build each bot

1

difficult concept
simplified, for all levels within a business

> **Josef is the first software I have seen where the lawyer is empowered to turn their process into a chatbot or an app. That is game-changing.**
>
> — **Mike Gonski,**
> **HSF Partner**

5. Automate contract creation and other common workflows

Contract creation can be a cumbersome and lengthy process. Changes can come via email, phone calls, or even handwritten notes on a physical contract.

Attorneys need a simple, automated process to create and revise contracts.

Solution: Through Josef, attorneys can automate the contract creation process.

Clients can pick and mix their own contractual terms from a pre-set list of options supplied by the legal team.

Attorneys can track progress, and view any changes made by clients.

Randstad's legal team built and **launched an automated contract creation process** within days. Following a successful pilot with a regional sales team and small group of clients, they deployed automated contract review to teams in Singapore, Malaysia, and Hong Kong. Each local team could customize their own versions within hours.

So, where next?

Explore what Josef can do for you.

Learn how you can build legal bots to:

- Automate attorney-client interactions
- Seamlessly generate automated documents
- Provide scalable legal guidance and advice

Schedule a 30-minute live demo to see the platform in action and learn how legal professionals around the world are saving time, scaling their services, helping more people and delighting clients with Josef. **Book a demo today**.

Book my demo

Transform the way you work with Josef.

Visit joseflegal.com to learn how.

Josef