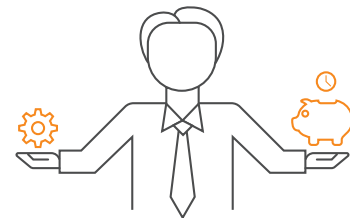


# Contract Express Customer Success Story

## Baker McKenzie

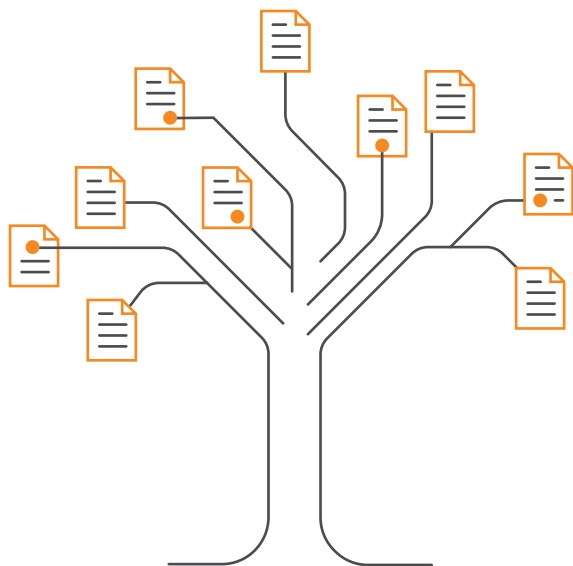
**Mark Ford, Chief Knowledge Officer and Sarah Pullin, Director of Global Knowledge Operations**, explain how Baker McKenzie have overcome challenges in resourcing, are saving up to 90% in document drafting time and how the sky's the limit for the future of automation with Contract Express.



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### 1 When did Baker McKenzie start using Contract Express and why?

Baker McKenzie has had a licence for Contract Express for many years, dating back even to when the platform was known as DealBuilder, but we have been bringing particular focus to document automation across the firm over the last four years or so. Our principal aim was to improve client service by increasing efficiency and reducing the amount of time spent on manual and repetitive tasks. We've had great success with it so far and feedback – both internally and from clients – has been universally positive.



“...the list of automated documents, which we align with the business' needs and strategy, is growing all the time.”

### 2 What were the key reasons for choosing Contract Express over other document automation solutions?

Contract Express was a game-changer when it was developed because it was the first product that allowed lawyers to draft automated documents themselves without having to learn any coding-type language or work alongside a technical colleague. This allowed us to automate documents much more quickly, easily and accurately than was possible with other products. It has also maintained a good balance between being user-friendly, whilst at the same time incorporating a lot of flexibility and many powerful features. It's important to us that we maintain ownership and control of our own documents, which often contain our most valuable know-how, ourselves. Contract Express is the best product that we have seen on the market that allows us to do this.

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### 3 How have the applications for Contract Express changed?

One of the most important lessons we have learned is that we have to be flexible in how we use the tool and be guided by the different practice groups in finding the areas that make the most sense for them. We tend to focus on relatively straightforward documents first, in order to get users comfortable with the concept of automation before we tackle more complex projects. But the key is really to look at where we will be able to achieve the biggest ROI, so for example we try to focus on documents that are heavily used, or where significant time savings can be achieved through automation. This has worked well for us and we now have engagement across all regions within the firm and a collection of almost 500 live templates in multiple languages. There are still plenty of opportunities to do more, however, and the list of automated documents, which we align with the business' needs and strategy, is growing all the time.

## 4 What challenges have you come up against; and how have you overcome them?

Our biggest challenge was probably resourcing. For the first year and a half, we had just one full-time colleague supporting all requests. However, we were able to leverage that fairly limited resource very effectively to realise considerable benefits. When it was clear that demand was outpacing this resource, the business case for more resource was obvious. We now have a central team of four and use a model of working with people on the ground in local offices.

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## What key results have you achieved?

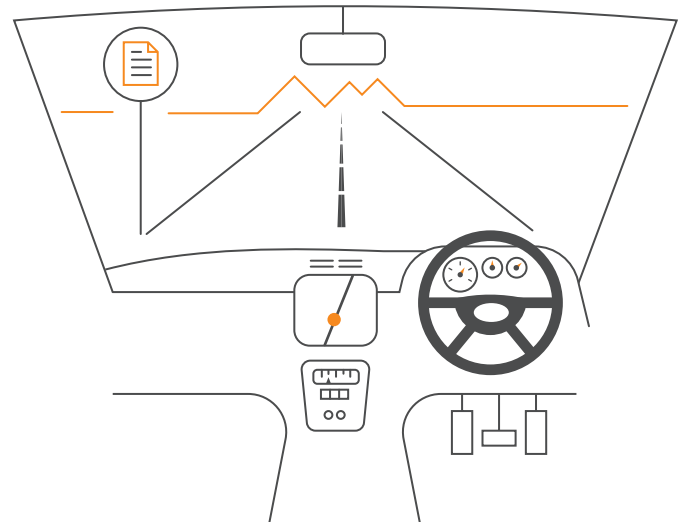
We track the number of requests, automated documents and usage; and have created a dashboard so everyone has clear visibility of what is being used and where. We measure ROI in a number of ways as it's important to be able to demonstrate the benefits that we are realising. As a rough guide, we estimate that lawyers can usually save between 30-90% of their manual drafting time, depending on document length and complexity. Once we have a document, or suite of documents, up and running for a while, we also compare pre and post-automation times so that we can quantify time and cost savings. Some of this involves estimates, but in most cases the story is pretty compelling. The qualitative feedback we've had is also positive, with colleagues noting the improved consistency that comes with automation.

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## How are you using Contract Express internally?

We are generally looking for high-volume manual drafting changes and repetitive tasks that can be automated. Our approach in most cases is to focus on helping our lawyers complete a first draft quickly, removing the more time-consuming, administrative aspects of legal drafting, and giving them time to focus on the more complex content. We also look for suites of documents that are often needed for a single client matter, where again we can save time by sharing data across multiple documents. Our biggest users tend to be the transactional areas, but we now have automated templates in each of our 12 practice groups, including product areas that are not traditionally heavy users of template documentation. A current area of focus is on the use of regional 'master' automated documents with jurisdictional variations, which is an approach we have had success with.

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## 7 How does using Contract Express externally with clients add value?

Our client offering of Contract Express has followed and built on our success internally. We were pleased to sign our first client to the offering last year, with very positive feedback, enabling them to support work they would otherwise not have had capacity for. Since then, the level of client interest has grown and we are regularly in dialogue about different automation offerings. Client feedback on Contract Express, and the difference it has made to their business, has also helped to further raise internal awareness of the tool and its benefits. Engaging with our clients on automation has deepened our relationship with them and enables us to directly meet specific needs they have.



## 8 What are the benefits of Contract Express for your clients?

Given the benefits we as a firm have seen from Contract Express, we see real value in the tool for our clients. For many straightforward, simple contracts, offering Contract Express to clients can help them quickly achieve some of the benefits we've been enjoying internally: less time spent manually drafting, greater consistency of work output, and elimination of repetitive tasks. Importantly, it also prevents our clients from having to spend money on using external lawyers to draft documents for them, when their in-house teams can easily do the work. In many cases, the documents can be generated by the client's business teams, without the need for input from their in-house lawyers. The workflow feature in Contract Express is particularly useful here because it allows clients to generate relatively straightforward documents themselves, whilst diverting more complex cases back to us for review.



## 9 What are your plans for Contract Express going forwards?

Now that we have established strong interest and engagement in document automation within the firm, we are formalising our approach and plan to 'relaunch' the offering as a Knowledge service to the global firm. This move will help us establish more accurate metrics on usage and ROI, so that we can continue to drive greater engagement both internally and externally. Establishing a formal process will also allow us to check in at each stage and gain more consistent feedback from our end users, which will enable us to make regular improvements as we continue to roll out the platform. We look forward to speaking with you again in a year or two's time and sharing all the exciting developments that have happened in the interim!

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