

# Briefing

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SMARTER LEGAL BUSINESS MANAGEMENT

## LEADING AT LARGE

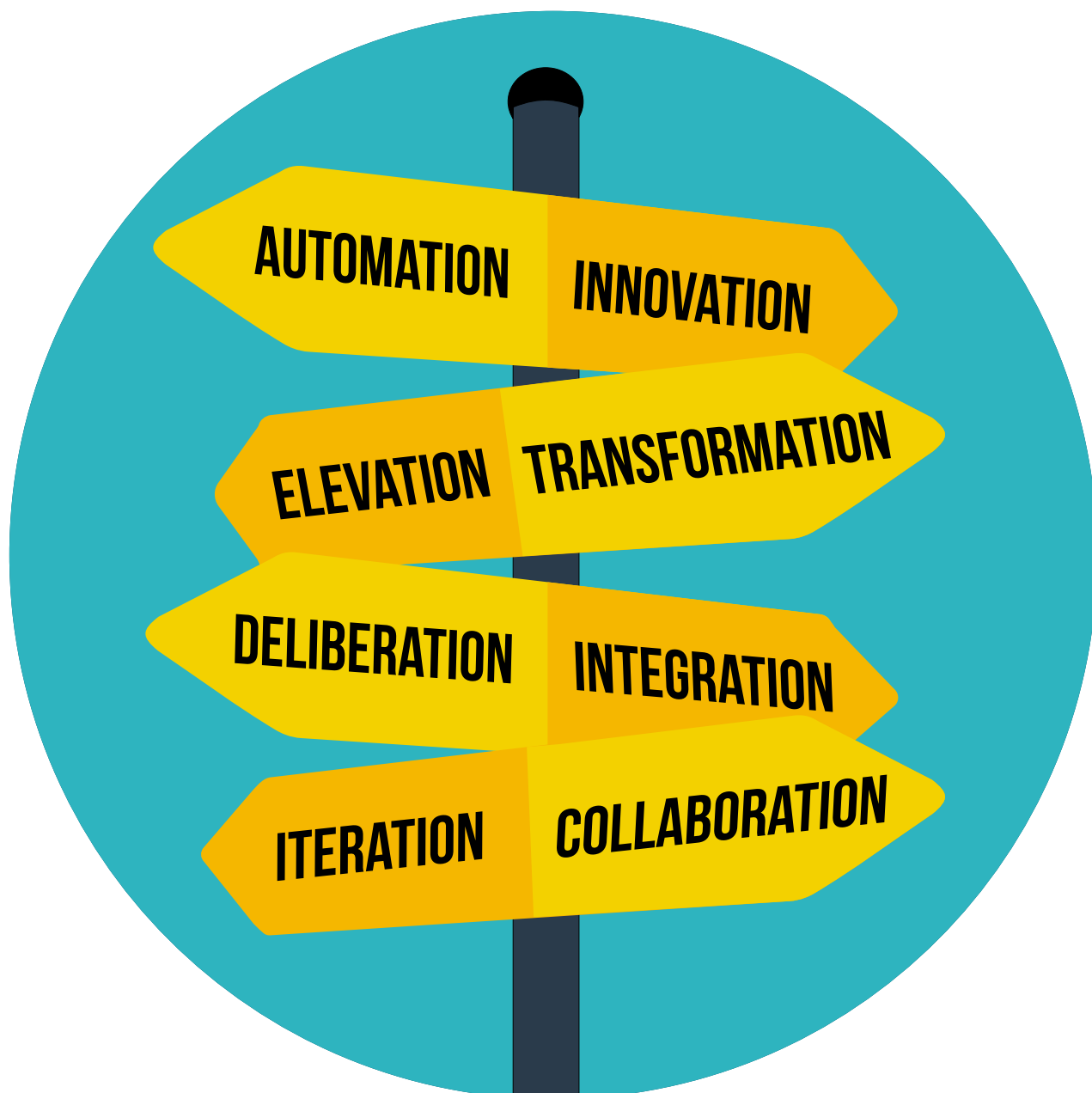
Just a minute with Briefing Strategic Leaders  
speaker EY's Dr Cornelius Grossmann

## INTO TRANSACTION

New career paths are forged in the  
Addleshaw Goddard Transaction Services Team

## SHARING THE WEALTH

How CMS used theory and data to  
drive more collaborative behaviours



## *Where next for knowledge?*

*The law firm knowledge management function has long left the confines  
of the library. Now it's looking for several other places to call home*

## INDUSTRY CASE STUDY

# Documenting decisions

Ruth Musgrave, global head of knowledge management, global transactions, at Freshfields Bruckhaus Deringer, discusses creating better, faster and more accurate documents with Contract Express

**T**he legal market is certainly very competitive – and in recent years the focus has been directed at legal services delivery, value-added services and value for money, so anything a law firm can do to improve on that has to be a good thing. After all, the drive comes from the client.

Innovation has a huge role to play in generating efficiency and, with Contract Express, Freshfields Bruckhaus Deringer has been able to create better efficiencies for its lawyers and, more importantly, improve client service.

“By driving users towards our own automated standard form documentation and templates through Contract Express, we’re able to create higher quality, more accurate and consistent documents, much more efficiently,” says Ruth Musgrave, global head of knowledge for the global transactions practice at the firm.

## Express benefits

Before Musgrave worked at Freshfields, she was a senior associate at another firm – a long-time user of Contract Express. During her time using Contract Express as an associate, she experienced these efficiencies first-hand.

“I found it extremely useful and could see the benefits it had for the way I worked and how I spent my time. As a result, I was able to provide better client service. And that’s what Contract Express now does for Freshfields.”

Its flexibility also caught her eye. When you create the questionnaire, which the Contract Express platform uses to generate an automated draft, she says, the coding for any individual

document is completely customisable.

“You can tailor it to the decision-making process that a lawyer will go through when they’re drafting. You can really pinpoint the things that are important for that document in that particular type of work. The customisation possibilities are extensive.”

There are also real risk benefits, she says, as you can add guidance notes, flag up particular comments and make recommendations throughout the questionnaire.

For example, Musgrave says, you could point out to a user that if they’re saying ‘no’ to a question where the recommended answer is usually ‘yes’, then they should either think about that more carefully or perhaps then talk to a partner.

“This type of customisation provides us with a huge advantage in risk management.”

## Innovation pockets

Innovation is a big part of the firm’s business strategy – Freshfields’ aim, Musgrave says, is to be the global leader in delivering more creative solutions to the challenges that its clients face.

“And there are a number of ways that we’re doing this, notably the development of our innovation strategy and dedicated innovation team.

“They’re always scanning the horizon to see how legal services are changing and looking for opportunities to bring benefits to our clients.”

Contract Express fits very well into our innovation strategy, she says. Freshfields seeks to combine what’s available through technology with its own lawyers’ skills and knowledge.

“By pulling these two elements together we can



really provide something for clients that is high quality and adds value. Document automation is a great example of all of that.”

She says there are many types of documents that can really benefit from being automated. It might be something used in high volume, like a non-disclosure agreement, or it could be something complex, with many possible permutations, which lends itself really well to identifying questions that would trigger a specific clause to be included or not, Musgrave explains.

“And if you’re not using Contract Express to do that, then someone has to take some time with the document to go through a decision process and make the changes manually.”

In the course of the automation process, the firm has also paid attention to areas of drafting that aren’t particularly taxing on the brain but are still time-consuming and absolutely necessary – such as changing singulars to plurals or, using an example from Musgrave’s own experience in practice, entering the company name in a loan

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*Ruth Musgrave, global head of knowledge management, global transactions, Freshfields Bruckhaus Deringer*

agreement some 25 times.

She says: “It’s great to have that time used more productively by our lawyers, rather than doing these relatively menial changes that can easily be done better, more quickly and accurately with automation.”

### Hit the roadmap

The firm wanted to be ambitious but also realistic – and after some good advice from Thomson Reuters early on, it successfully launched in May with nearly 60 automated standard forms and templates from three global practice groups. This included documents not only from Freshfields’ London practices but also from different parts of mainland Europe and Hong Kong.

“Thomson Reuters told us not try to make the coding super complex in the beginning as we can always build on it later. This was really helpful advice for our knowledge team who led the project. We were also focused on the user experience – a very long and complicated questionnaire could well be off-putting.”

In terms of promoting the product internally, the benefits to the individual were so clear that it wasn’t difficult getting people onboard, she says.

“The user experience is so intuitive, you really don’t need to give extensive training – working through the questionnaire is very user-friendly.”

Musgrave and her knowledge colleagues held a mini roadshow internally to do demonstrations for certain teams in London and other offices, including a videoconference with the firm’s Middle East offices. “We have English law qualified lawyers practising across our global network. For example, our English law non-disclosure agreement, which is our most popular Contract Express document to date, is used extensively by lawyers all over the firm.

“We have a very collaborative environment and Contract Express allows us to reach all our regions in a similar fashion.”

### Sweet seamlessness

It was very important to create a seamless experience and really embed Contract Express into Freshfields’ working practices, she says.

Lawyers are used to accessing knowledge products, standard forms and templates in a certain way through the firm’s intranet or knowhow database, Musgrave says. “And we have been able to maintain all of that – only now, when

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[www.contractexpress.com](http://www.contractexpress.com)

they identify the document they want, they're directed to the Contract Express platform to begin the questionnaire. So the process for access hasn't changed, and this has been great for adoption."

As the integration is so seamless, the only thing lawyers are doing differently is drafting documents more quickly and efficiently.

"It saves us a lot of time. Generating a document that already has key information and things like singulars and plurals included, and important structural elements incorporated, means that our lawyers can spend more time drafting the more bespoke and complex parts of an agreement, and then reviewing the whole thing," Musgrave says.

And, she says, automation through Contract Express can be used to do something clever for the client.

"For example, if you know that a particular company will need four or five documents, you can have a single questionnaire for those documents as a 'suite'. The questionnaire will ask questions that populate every document, and then additional questions that are specific to one or another as appropriate. In this way you can use one questionnaire to generate a few documents as a package, which is often required in transactional work.

"It's been a very popular feature of Contract Express, all the while making our documents more accurate and consistent – and it reduces costs overall."

Of course, she says, everything is still reviewed and carefully checked before going to the client, but the starting point is more advanced – you've a package of documents for a client and transaction-specific details are right across the suite.

### A step further

Freshfields has over 500 Contract Express users and lawyers have created over 1,400 documents, since it launched in May 2018.

"We're absolutely delighted with how well it has been taken up internally in only eight months.

"As is often the case with something new, our people see how it works and are prompted to think of other ways they could use it."

Freshfields has several associate-led projects where lawyers are working out how automation

could assist further on client-specific matters. Examples are clients with whom the firm works regularly that have an internal template they like external counsel to use, Musgrave explains.

"One thing we can do is automate that client template so the next time a Freshfields lawyer prepares that particular document with that client, the process to do that will be extremely streamlined and efficient.

"Contract Express, and our ability to tailor it for clients, has become an important part of our presentation of our legal tech capabilities to clients generally."

And Freshfields continues to expand Contract Express to other practice groups and documents – there's just so much opportunity to be had, Musgrave says.

"There's been great collaboration between knowledge lawyers across our global offices. Where a document is being automated in one location, a knowledge colleague in another jurisdiction can draw from the way that document has been automated. It saves people from doing the same work in different areas."

### Opportunity abounds

Musgrave says working with Thomson Reuters really is like a partnership. "Thomson Reuters has been extremely helpful in providing us with information, guidance, training, technical support and so on, right across the team."

And as it has such a broad platform, Freshfields' lawyers are recipients of the knowledge services that it supplies through, among others, Practical Law as well.

In addition to the automated standard forms, there's the suite of automated Practical Law templates available, which is an added bonus, she says. "Thomson Reuters is an organisation that is looking to innovate, and that was very important to us in selecting them as our document automation partner."

It's been a big project for Freshfields to undertake, and for the knowledge team in particular, she says, but a real achievement – to have it launched with such quick success and with a strong pipeline of new documents in development. ▀