

2019

# CONTRACT EXPRESS

## AUTOMATION CHAMPIONS



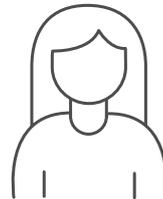
### SUE COLLEY

Penningtons Manches Cooper



#### Background

When I joined, the firm had just introduced the letter of engagement to the corporate team. I worked closely with the Risk team to ensure it complied with all necessary regulations and with the corporate team's knowledge lawyer to ensure that the letter worked for all stakeholders. Our goal was to have one letter that worked for everyone.



#### Engaging the right people

Once we had the core document we rolled it out to a pilot group for their views. The objective was to listen and act on this feedback. If someone had decided not to use Contract Express we needed to find out why. Sometimes it's a training issue, sometimes it's because we hadn't factored in their particular requirements. We needed to understand how all the teams would use it, double-checking that what we had been asked to deliver is what they wanted.

One of the lessons we learned was not to assume that just because one team has signed off a document it doesn't necessarily mean it is right for all. Making sure the source document is workable for every team is key. Having internal champions was a big help, in particular working closely with the knowledge lawyers.



### Implementing for success

Close communication with all parties is key. It's best to meet with stakeholders more regularly in the early stages of the implementation process and so you can deliver on all their requirements. Keep meeting the stakeholders throughout the process, to make sure what they've asked for is actually what they get, because things can sometimes get lost in translation. Once a document is automated we then remove the old style precedent to ensure that people have no option but to use the automated version.

Success is when people are using it and everyone is happy with it. One fee earner's response:

"I thought it was great, very user friendly and informative, with useful pointers from Risk ... I think it is going to make engagements letters much easier to draft!"

When we had to build a business case to purchase more licences, we could clearly show a return on investment by showcasing the suite of documents that we had developed for the social housing team. It used to take 50 minutes and it is now taking 18 minutes, which is 64% less time to produce these documents so it's a no-brainer. We try to show a direct time saving, but we also look at things that aren't tangible, like the fact that you're removing risk elements.

We are now at a stage where we are using workflows in our day to day work. Though there have been challenges in understanding some of the limitations, we've taken it further than we would have done a year ago. We're now taking it to another level.

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