MITRATECH

"We Absolutely Love It"

3 TAP Workflow Automation Case Studies

See how enterprise users optimized Legal Operations in these real-world examples.

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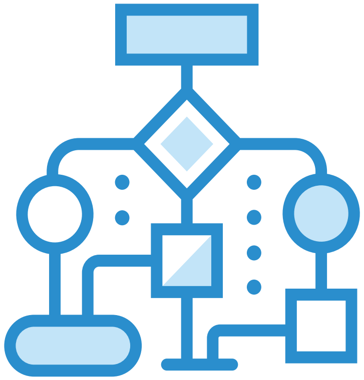
01 Introduction: The Importance of Proven Workflow Automation

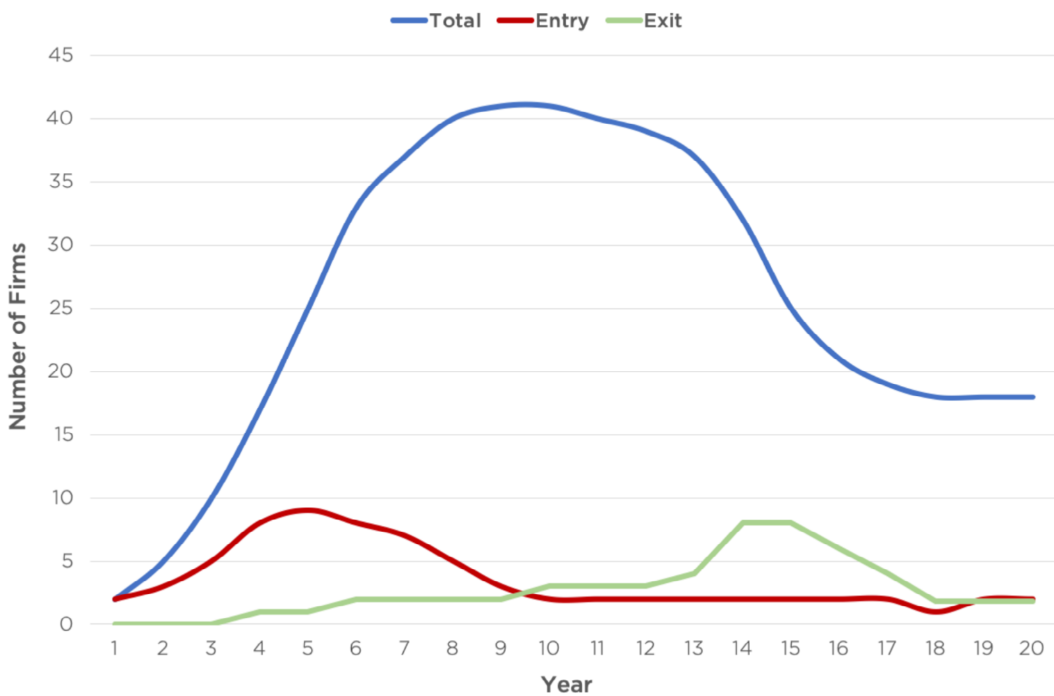
As of the publication date of this document, there were **147 companies** listed on the startup tracker site Angellist under the keywords "legal automation."



Considering how new technology sectors typically evolve, new startups will spring up to grab a piece of this market. So it wouldn't be surprising if there are twice as many "legal automation" providers listed a year from now.

But in light of how every new tech sector shakes out, going back to the days of the automobile and television? Nobody should be surprised if the vast majority of these startups and newcomers have **vanished** several years from now.

The industry shakeout chart below shows how this happens in emerging industries.[1] This leaves customers to wonder whether or not to limp along with unsupported solutions, and pondering the process of re-investing all over again in another legal workflow automation product.



[1] Agarwal, R., Bayus, B.L. & Tripsas, M., Abandoning Innovation in Emerging Industries. Cust. Need. and Solut. 1, 91–104 (2014); https://doi.org/10.1007/s40547-014-0015-y

The importance of a proven product and provider

For companies with a high volume of critical legal work on the line, it's vital to adopt a legal workflow automation solution with the **features and flexibility** to help solve all the mounting challenges confronting Legal Operations: To boost efficiency and productivity, better utilize highly paid staff, reduce costs, eradicate errors, and improve responsiveness and agility.

Flexibility and customizability are especially crucial because they allow a product to **evolve with changing needs**, so it's future-proofed and generating ROI for its users for many years to come.

But just as importantly, the right legal workflow automation solution must be backed up by a **steadfast, established provider with a proven track record** of long-term customer/user support.

Those are the qualities that drew Legal Ops teams at three major multinationals – **Gap, IDEXX,** and **Electronic Arts** – to **TAP Workflow Automation**. In the following three case studies, drawn from a roundtable webinar, they recount how TAP and the team behind it helped them each address a knotty legal process challenge.

"We absolutely love it."

Devshree Chauhan
Manager, Legal Operations
Gap Inc.

01 Matter Requests & RFPs | Gap Inc.

Gap Inc.

Employees: 135,000

Stores: 3,500+ worldwide

Revenues: $16.3 BN

The challenge?

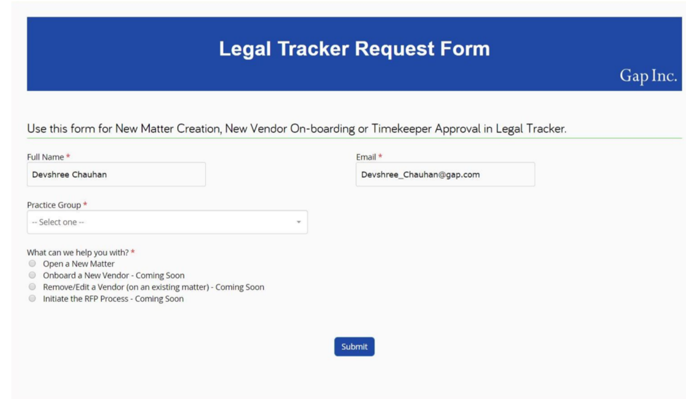
According to **Devshree Chauhan**, Manager, Legal Operations for retail giant Gap Inc., their first use of TAP was to resolve issues around "how matters were getting created within legal chapters. We would get requests from law firms, as well as in house attorneys to create the matter, but we wouldn't always have all the information that we needed in order to get the matter created."

The previous approach relied on collecting data to open new matters in Thomson Reuters Legal Tracker (formerly Serengeti Tracker) using "a long, extensive spreadsheet that folks had to fill out, but a lot of times we got data that was incomplete or incorrect," Devshree says. "That just slowed down the entire process," as dirty data would enter the system, meaning "there's dirty data out, which defeats the purpose of having that matter management solution."

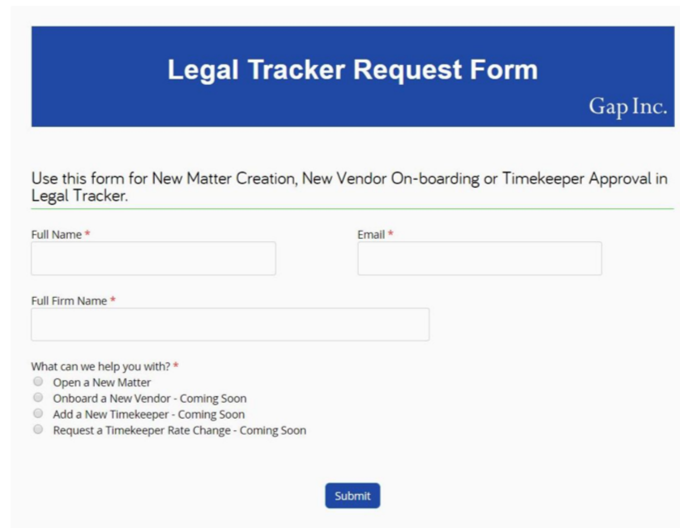
Turning to TAP

Devshree and the Gap Inc. team decided workflow automation was the answer to this intake quandary. Using TAP's drag-and-drop Form Designer, they were able to create a single online form, integrated with their Legal Tracker configuration, that did double duty by handling intake of requests from either in-house staff or a law firm.

"The great thing about the tool is that it's just one form built within the system and based on the logic provided to it, it can automatically decipher whether this was an in-house attorney who's trying to log in and request," Devshree explains, "or if it's an external person trying to do this and [the system] can push the correct form out to the user."

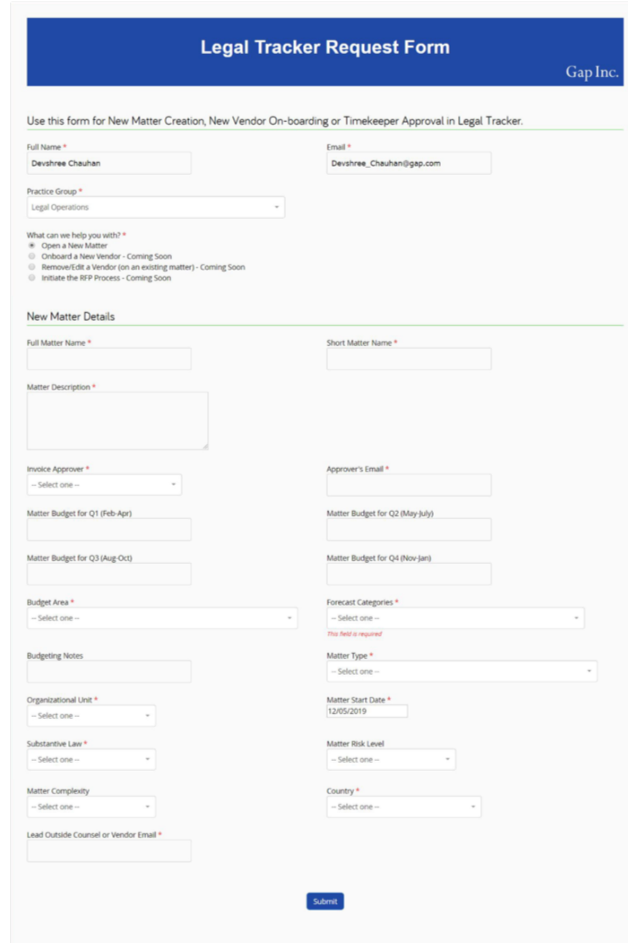


The form, as you can see, already promises users it'll soon be usable for a variety of requests beyond matter management. Some of the other requests to be added will include new vendor onboarding, timekeeper rate reviews or rate changes, and RFP requests.



Once they've opened a request, users are presented with a set of fields to fill out to capture all the information necessary for opening a matter. "This is done dynamically depending on what [request] option is selected," Devshree says, as the form's embedded logic determines which fields are displayed and populated.

Once the form has been filled out, TAP uses an API call to automatically create the matter in Legal Tracker. This cuts the time between when a matter request is submitted and when the matter is actually created in the e-billing solution, allowing law firms to begin clocking time and invoicing against it.



Legal Tracker Request Form

Gap Inc.

Use this form for New Matter Creation, New Vendor On-boarding or Timekeeper Approval in Legal Tracker.

Full Name *
Devshree Chauhan

Email *
Devshree_Chauhan@gap.com

Practice Group *
Legal Operations

What can we help you with? *
- Open a New Matter
- Onboard a New Vendor - Coming Soon
- Remove/Edit a Vendor (on an existing matter) - Coming Soon
- Initiate the RFP Process - Coming Soon

New Matter Details

Full Matter Name *

Short Matter Name *

Matter Description *

Invoice Approver *
-- Select one --

Approver's Email *

Matter Budget for Q1 (Feb-Apr)

Matter Budget for Q2 (May-July)

Matter Budget for Q3 (Aug-Oct)

Matter Budget for Q4 (Nov-Jan)

Budget Area *
-- Select one --

Forecast Categories *
-- Select one --
This field is required

Budgeting Notes

Matter Type *
-- Select one --

Organizational Unit *
-- Select one --

Matter Start Date *
12/05/2019

Substantive Law *
-- Select one --

Matter Risk Level
-- Select one --

Matter Complexity
-- Select one --

Country *
-- Select one --

Lead Outside Counsel or Vendor Email *

Submit

Significant savings

Implementing TAP in just this single instance has already delivered powerful efficiencies. As Devshree points out, the amount of on-task time spent by an individual to create a matter was **reduced from about 2.5 hours to only 10 minutes.**

Time to Create a Matter

2.5 hours ⟶ 10 minutes

Another metric they used? Total cycle time - how long it takes from the moment when an attorney decided to submit a request (previously done as a written request) through collecting necessary data and getting the matter uploaded into Legal Tracker. **Prior to TAP**, this took close to **four weeks**. With TAP, it's been reduced to an average of just **two days**.

Total Cycle Time

4 weeks ⟶ 2 days

Other TAP benefits?

One feature Devshree says attorneys have “absolutely loved” is their ability, thanks to TAP, to **approve or decline matter requests through email**. Matter request emails are routed to the proper attorney based on the data in the front-end form, and form data that’s relevant to their review gets included in the email. An approve/decline button in the body of the email makes it simple for them to decide on each request. As she explains:

> *“They don’t ever have to log into TAP to approve this request. They can do it right via their emails and they’re done. And they love this. They love the fact they don’t have to remember another password. They love the fact they don’t have to log into another system.”*

TAP’s ease of integration stood out, too. Its ability to connect with Legal Tracker’s API port “made things really easy,” she says. In this case, the TAP Professional Services team helped create the API calls, because “I personally am not a coder,” Devshree says. “But if somebody has the capabilities for doing that? It was a really simple process, and it didn’t really take that long to get that implemented.”

Applying TAP to an RFP workflow

Since applying TAP to matter management request intake, Devshree and her team decided to use against another need: to create an RFP workflow. They'd been evaluating different dedicated RFP tools and found that there were "some really nice tools out there," she says, "but they're super-expensive." Plus, the time needed to implement an RFP tool and train people in how to use it – both in-house and at law firms – was another consideration.


Thu 12/5/2019 6:37 PM
Devshree_Chauhan@gap.com
Old Navy RFP Request
To Devshree Chauhan
Retention Policy Gap-36-Month-RPT (3 years)

Old Navy Inc.

New Request for Proposal

Hello Devshree Chauhan,

This paragraph shows up as part of the email sent to the Law Firm.

Should you have any questions, please direct your communications to the following point of contact for further clarification and/or information: Caitlin Martinez

Any unauthorized contact with other members of our organization in relation to this RFP may disqualify you from the process.

Please note the due date for submission of your proposal is: **12/05/2019**

We look forward to receiving confirmation of your firm's intention to participate in this RFP and, in due course, your firm's proposal in response to this RFP. Click here to access the RFP form.

Sincerely,

Caitlin Martinez

Those factors led the Gap team to implement an RFP workflow via TAP. When an attorney from within Gap sends out an RFP request using TAP, they're able to customize the text included in the email the law firm is going to receive.

As they complete each stage in the form they receive, the next section is opened, and so on, ensuring the RFP form is fully completed before the law firm submits it.

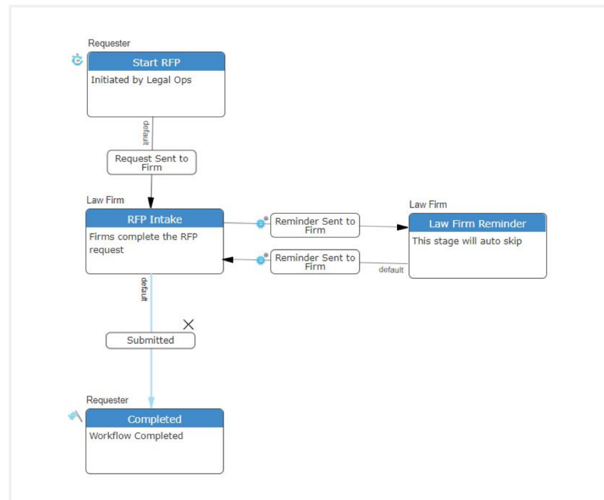
The workflow the Gap legal operations team designed was relatively simple, but it was all they required, with a few **automated notifications** baked into it to make sure they got timely responses from law firms. "With this," Devshree says, "we saved a ton of money, which is always a good thing."

Another TAP feature they put to use? **E-signature integration**, "so not only do we have validation," she says, "but as they're submitting their requests, we have nondisclosure agreements that need to be signed. So all of that gets done within TAP itself, right as they're submitting the RFP, and we're able to integrate this with AdobeSign, which we use enterprise-wide."

How long did it take to build and publish? After four hours of team whiteboarding to decide the process, "it took us four hours to build this workflow," she says. By the end of that day, the workflow was live and had begun sending out RFPs to law firms.

"We saved a ton of money, which is always a good thing."

Devshree Chauhan
Manager, Legal Operations
Gap Inc.



02 Contract Approval | IDEXX Laboratories

IDEXX Laboratories, Inc

Employees: 8,000+

Operations: 175 countries

Revenues: $2.4 BN

The challenge?

"One of the major issues you have in a large global company," says **Andy Cooper**, Legal Operations Lead Analyst at IDEXX Laboratories, "is the ability to get a contract approved by the right people."

As a leading provider of products and services for the companion animal veterinary, livestock and poultry, water testing, and dairy markets, IDEXX

As a leading provider of products and services for the companion animal veterinary, livestock and poultry, water testing, and dairy markets, IDEXX has "60 subsidiaries and probably 15 to 30 lines of business and business responsibilities," Andy explains. So someone in Procurement may not know where to go to get a contract approved, and the previous process has its shortcomings. An email with voting buttons would go out to approximately a dozen people, though only five or six actually needed to be involved for approvals. Moreover, emails went out in no particular order, and the system wasn't trackable.

As he points out, "you don't know where it was in the process," or who had already approved a contract. C-suite officers wouldn't want to review larger contracts until they'd already been approved by the legal and finance department and any number of others further down the chain.

"So we have this quagmire," he says, where a contract was "essentially a ping pong ball, where things were without traceability."

"So we have this quagmire," where a contract was "essentially a ping pong ball, where things were without traceability."

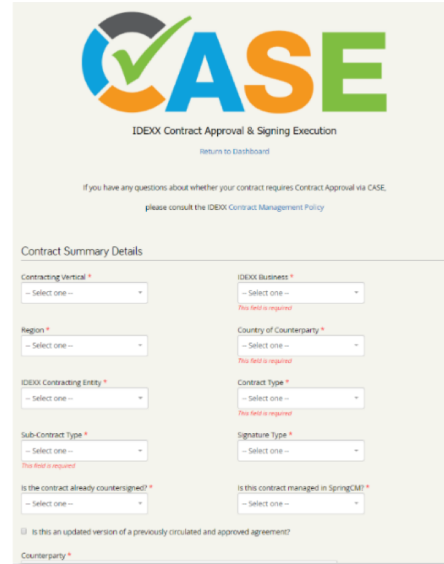
Workflow automation to the rescue

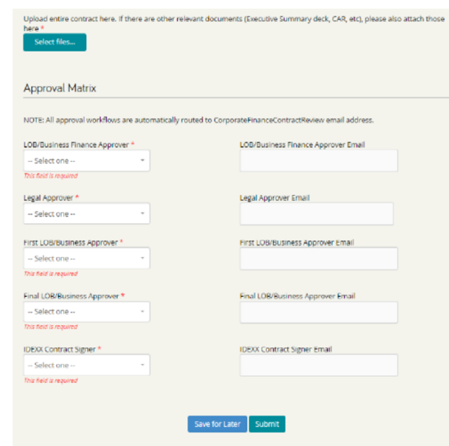
To get the process out of the mud, IDEXX created a Contract Approval and Signing Execution (CASE) process **entirely inside TAP**. Once a contract has been created in their CLM system, it's moved into TAP.

By using key metadata the contract originator includes when s/he enters the document into TAP regarding the type of contract, the Line of Business, what entity is involved, its value, and other factors, the system can automatically route it to the right parties for review. Out of "800 potential approvers," Andy explains that TAP narrows the field so it's sent to only the relatively few who are actually appropriate.

The workflow walks the contract through these parties in correct order, from origination to completion and signature, while generating a trackable, auditable database for each contract.

As seen in the CASE Workflow Launch Form pictured, the metadata entered at the top of the form influences what fields and dropdowns are displayed later in the form. This progressive filtering using embedded business logic allows TAP to determine exactly who should receive that particular contract, and in what sequence.





Oversight and security

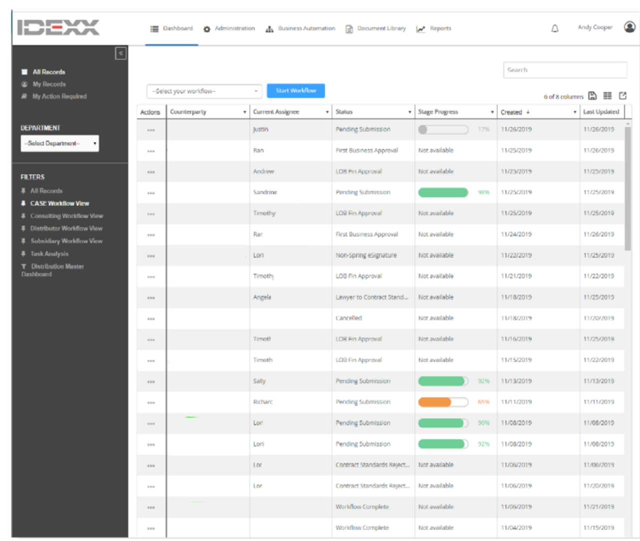
Another TAP feature that Andy endorses? How it delivers a **reportable dashboard** for tracking contract status. Previously, "you would normally have to sit there and pick through your voting buttons to determine where the contract is," he says. With TAP, he can access an admin dashboard and have visibility into workflow status, who a given contract is sitting with, what stage it's at, and monitor the overall progress of all contract workflows.

"Just a huge impact to the overall company value."

Andy Cooper
Legal Operations Lead Analyst
IDEXX Laboratories

Better yet, TAP's robust access control features mean the person using a dashboard can ***only*** view those contacts he or she is ***supposed*** to be involved with.

After the IDEXX team invested time in optimizing the CASE process, it was launched globally as part of what Andy calls "a fully operational battle station" serving the entire enterprise. It's already had, as he puts it, "a huge impact to the overall company value" by bringing trackability and control to that former contracts approval quagmire.



03 Unifying External Processes | Electronic Arts

Electronic Arts Inc

Employees: 9,700+

Operations: 31 locations

Revenues: $4.95 BN

The challenge?

As **Yuka Tzavaras**, Senior Manager, Legal Operations at EA tells it, they've been TAP users nearly since it launched. And she's been an enthusiastic user the entire time.

"One of the things I love about TAP is that if you know how to use Vizio or know how to build a business process diagram," she says, "you can pretty much build a simple workflow in TAP."

TAP can certainly tackle complex workflows, as when "we implemented one of our most complicated workflows that we've ever handled," Yuka says, a contract lifecycle management process which integrated contract review, process approvals, e-signatures, and next-action triggers.

Designing it as a single massive workflow with literally scores of steps and sub-steps, though, resulted in issues when it came to administering and supporting such a complex animal.

Simplifying complexity

Troubleshooting such an intricate workflow turned out to be difficult. "Imagine if there was a bug or an issue at this stage, or this stage...imagine having to troubleshoot that," she says. "It's very time-consuming, and managing this workflow is virtually impossible."

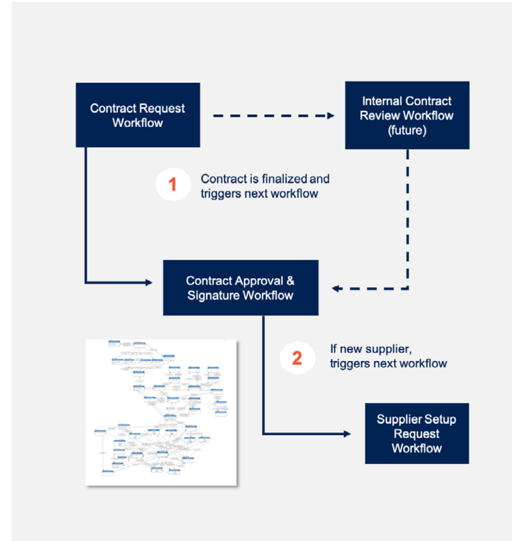
But the workflow in question was central to others across the organization, so it was important to figure out how to make such workflows more manageable.

Yuka and her team took advantage of one of TAP's real strengths: its ability to **seamlessly link** workflows. "What we decided to do was break complex workflows into sub-processes and create smaller, manageable workflows," she says, "and then use TAP's feature, Child Workflow, to connect the pieces together."

In her example, a Contract Request Workflow was the first workflow in a series. When a contract draft is uploaded, it triggers the next stage, a Contract Approval & Signature Workflow, and automatically assigns a task to the next person in line.

At the same time, it passes data entered during the first step through to the second step, eliminating the need for repetitive data entry, saving time for participants. Also, if the contract involves a new supplier, then approval and signature of the contract then triggers a Supplier Setup Request Workflow.

Using Child Workflow has proven to be a much smarter approach, still enabling bigger workflows to be put into action while simplifying maintenance and support. "This ability to connect workflows is key, especially when you start building more complicated workflows," Yuka says. "We found it very beneficial. It makes my life easier; it makes my team's life easier."



"It makes my life easier. It makes my team's life easier."

Yuka Tzavaras
Senior Manager, Legal Operations
Electronic Arts

About Mitratech

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With Mitratech's proven portfolio of end-to-end solutions, enterprises worldwide are able to implement best practices and standardize processes throughout their organizations and realize fast time-to-value.

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