

No-code for in-house legal teams

9 solutions for GCs navigating rapid
growth

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Foreword



Brian Hupp

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Former Head of Legal Operations, Facebook
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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
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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 eBook will guide in-house teams 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?



Josef

In-house legal:
Challenges & solutions

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

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.¹ Teams, however, are expected to remain fairly static, with a projected headcount increase of only 3% over the same 3 year period.²

+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.

What are the broader challenges faced by in-house legal 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.

[Here's how >](#)

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.

[Review the full Fnatic case study here >](#)

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

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

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

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.

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

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**





Josef

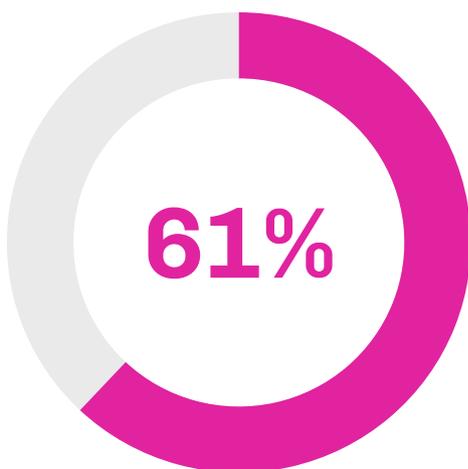
**In-house legal:
Challenges & solutions**

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% legal budgets go to external counsel

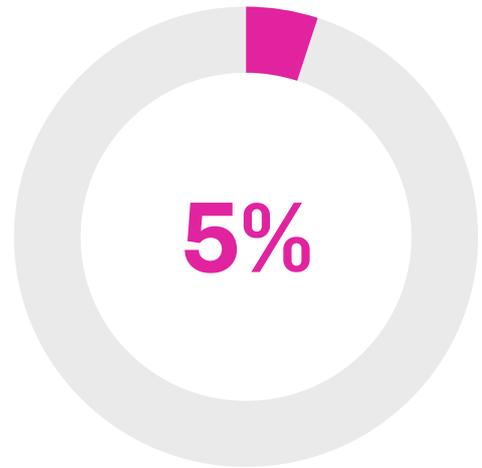
If low-value work is done by tech, internal counsel is free to keep work in-house

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

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.³

Only 5% legal budget is currently spent on tech

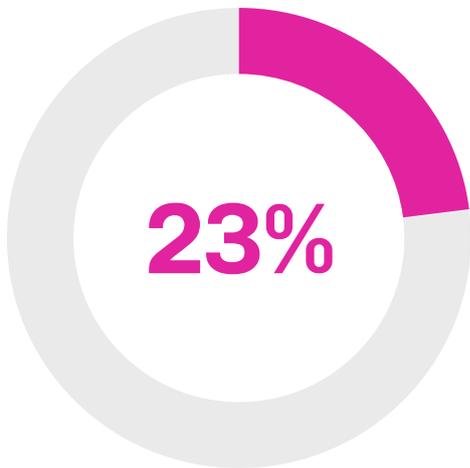
Increasing tech spend empowers internal counsel to become breadwinners, providing high-value strategic legal and commercial advice.



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.⁴



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.



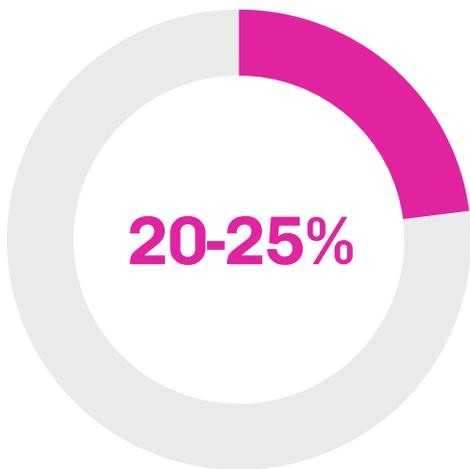
By using intake and workflow tools, you can achieve a form of 'passive' matter management, so leaders can see what work is happening within the department.



**– 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.⁵ 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% 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.”⁶



Josef

**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.

How legaltech can help: Five practical solutions

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

[Here's how >](#)

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"

[Review the full case study >](#)

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

How legaltech can help: Five practical solutions

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

[Learn how a self-service portal can help in this case study >](#)

750

clients

served with
the bot

335

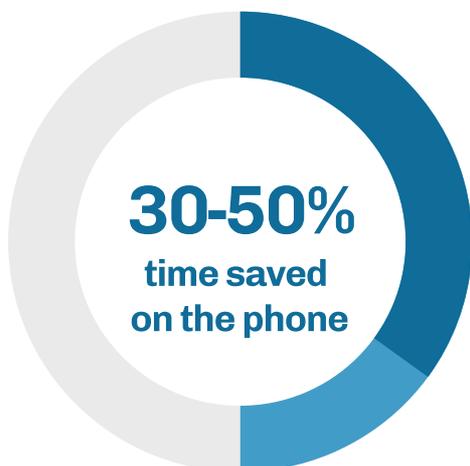
help-seekers

diverted to services
that can help them

85

hours

saved on calls



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.

[Here's how >](#)

How legaltech can help: Five practical solutions

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

[Review the full case study >](#)

The screenshot displays a chatbot interface for Birchal. The chatbot, represented by a 'b' icon, initiates the conversation with a greeting and an offer to assist with completing declarations and consents. The user, Alex Scott, provides the following information in response to the chatbot's prompts:

- Full legal name: alex@123-legal.com
- Email address: alex@123-legal.com
- Personal address: Suite 10, 383 Main Street
- Company name: 123-legal
- Company ACN: 1484025511
- Registered address: Suite 10, 383 Main Street
- Current position: Senior Partner
- Offer Document date: (The user's response is partially obscured by a greyed-out input field)

The right side of the interface shows the Birchal logo and the title 'Declaration and consent'. Below this, there are two horizontal lines, one labeled 'Birchal' and the other 'ACN search tool'. At the bottom right, it states 'Powered by Josef + Privacy'.

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

How legaltech can help: Five practical solutions



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**

[Review the full case study >](#)

The screenshot shows a web interface for a chatbot titled "HERBERT SMITH FREEHILLS CHATBOTS : WHISTLEBLOWING FOR DIRECTORS (AUSTRALIA)". The interface includes a chat window with a user message "Hi!" and a bot response. The bot response provides information about the tool's purpose, new laws effective from July 2019, and a question about whether the whistleblower has agreed to share their identity. Below the chat window are three buttons: "Yes", "No", and "Yes, but they've placed limits on their agreement". To the right of the chat window is a sidebar with the Herbert Smith Freehills logo and the text "Herbert Smith Freehills Whistleblowing app for Directors (Australia)". At the bottom right of the sidebar, it says "Powered by Josef · Privacy".

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.

[Review the full case study >](#)

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](#)

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