

# GC Teams' Path to Less Stress and More Appreciation

7 Recommendations for Optimizing Your Legal Service Chain

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## EXECUTIVE SUMMARY

### Background

GC teams are feeling overstressed and undervalued. Many are turning to technology to optimize their value and productivity. But the rush to adopt something 'quick and easy' can lead down the wrong path to unpleasant downstream effects. Given your goals, what's the better way to proceed?

### Your Goals | The Desired State

- Deliver high quality, strategic/risk advice
- Reduce stress and protect team from burnout
- Reduce waste and improve efficiency
- Improve customer satisfaction
- Improve visibility and appreciation of legal groups' contributions to the corporation.

### Seven Recommendations

#### 1. Focus on How You Create Value | Legal Service Chain

Thinking about your legal operations—as though it's a production line—opens the door to improving process flow.

#### 2. Choose the Right Partner | Your Success Insurance Policy

A legal-centric partner with an agile-team bias and experience will improve the chances of being a good fit for your needs.

#### 3. Prioritize Outcomes Not Functions

Focusing on the result you want—will help focus your energies on how to get there and release you from the restrictions of 'that's how we've always done it'.

#### 4. Avoid Detrimental Downstream Effects

Technology and production processes are elements of complex interdependent systems. Failing to consider the impact of your choices can have disastrous ripple effects.

#### 5. Managing Expectations of an Iterative Process

Set a helpful expectation that the best solution will emerge only with time and the input of all concerned.

#### 6. Loop in Clients Early and Often

A well designed system includes all users in developing its scope and functionality. Overlooked needs can lead to costly rework or worse—non adoption and non use.

#### 7. Pursue 'AND' Solutions

It might be easier to think about comparing one solution to another and making an either/or decision. But you don't have to settle for either/or today. You can combine the best of what you want by thinking AND.

### GC Teams' Common Missteps | Selection Shortcomings

Avoid these 4 missteps from the mirage of common GC-technology choices.

#### 1. General Collaboration Platforms

Selecting well-known general collaboration software is easy and familiar, but starts you down the wrong path.

#### 2. General Ticketing Systems

Help you gain some control over incoming requests, but create more downstream problems than they solve.

#### 3. Legal-Specific Point Solutions

Powerful specific functionality but expensive and silo-creating.

#### 4. Legal-Specific, Multi-Function Integrated Platforms

Powerful and scalable functionality at a price and complexity way above your capabilities.

## CONTENT OVERVIEW

### What's Your Problem?

Typical issues faced by in-house legal teams—and success-limiting factors.

### The Desired State | Your Goals

In a perfect world you'd enjoy reduced administrivia, better-focused efforts, and more appreciation of your team's contribution to the corporation.

### GC Teams' Common Missteps | Selection Shortcomings

Summary of solutions often chosen by GCs—their perceived benefits, and other often overlooked costs and detrimental effects.

### Primary Recommendation | Focus on How You Create Value

Give top priority to how your team earns its keep. Your path to improvement begins there.

### Supporting Recommendations

Once on the path to optimizing your value chain, these suggestions will keep you on the right track.

### Your Challenges, Our Solution

Process example, GC Challenges and our partnership's solution.

### What Do We Know? | We Can Help

About the mercanix, NetDocuments and DocuSign partnership—our strengths and synergies.

# GCs Overstressed and Undervalued

In the corporate world General Counsel teams are kept relatively small, but the pressure you're under isn't. Being a cost-center jammed in a profit-driven world has you feeling overstressed and undervalued. Your efforts to protect your company from risk are often lost on your corporate peers. They expect things done yesterday. And don't really care for legal 'guidance'—read push back.

## Your Production Support System - Missing in Action

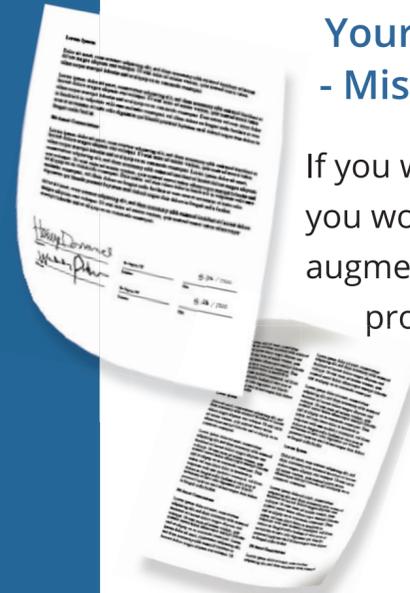
If you were any other department in your company, you would already have technology that supports and augments your 'manufacturing'. Such a legal production support system can help your team create higher quality product, more efficiently, and with greater ability to measure and manage performance.

## What's Your Problem? | The Challenges of General Counsel Teams

Your law firm days are far behind. No longer the profit engine, you're a cog in a corporation. You can't choose your clients. And the ones you have aren't sympathetic to your issues. They have their own. They have to deliver results

right now. So they expect you to jump to it and give them what they need. Few care about how you are an insurance policy, protecting the organization from potential risks. In their eyes you are a really just a roadblock in the way of their doing more

deals, and making more money. They are disinclined to prioritize your efforts to safeguard the company, its reputation and fortunes from risk.



# Your Goals | The Desired State

You need to find a way to work within your team's constraints to do things faster, smarter—that still delivers at the highest legal standard and protects the company from future risk.



- Deliver High Quality, Strategic/Risk Advice
- Reduce Stress and Protect Team From Burnout
- Reduce Waste and Improve Efficiency

- Improve Customer Satisfaction
- Improve Visibility and Appreciation of Legal Team's Corporate Contribution

## Important Considerations | Additional Success-Limiting Factors

### *Lean, Mean and Silo'ed*

To boost client satisfaction, and dial down your stress levels, you'll need to find a way to improve your service with the headcount you have—reducing waste, increasing efficiency. That's because, in-house legal teams are typically run 'lean and mean' — with constrained operational budgets and minimal admin and lawyer headcounts. So as your group faces increasing demands it's not likely you will see significant and fluid increases in either operational funds or headcounts.

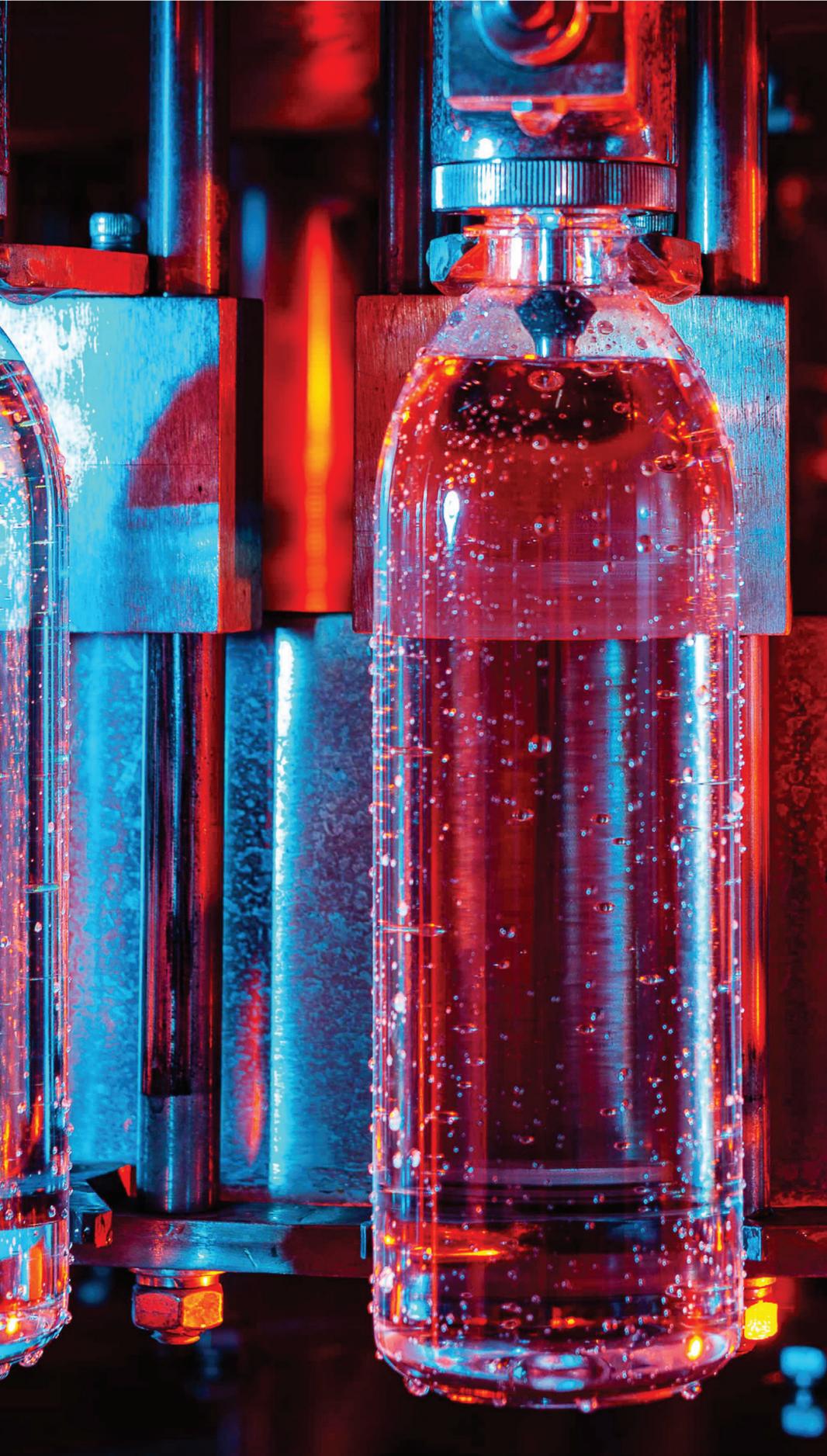
### *In-house IT: Little or No Legal-Specific Experience*

As a captive in-house team, you'll probably be sharing IT support. Further, it's quite rare that your corporate IT team will have legal-specific experience and understanding. (They too are expected to be Swiss Army knives—serving and supporting multiple operational groups to the best of their resources and abilities.)

### *Evidence Needed to Prove Contribution*

Additionally, to demonstrate your value, you'll need to track and report on the amount and value of the work performed to demonstrate your value come performance appraisal and budget allocation times. But it's a Catch 22. Without evidence, it will be hard to justify more investment in your systems. So you'll have to spend the budget that you do have wisely.





# GC Teams' Common Missteps | Selection Shortcomings

To help you avoid these 4 common missteps, we shed light on the mirage of common GC-technology choices.

## 1. General Collaboration Platforms

*eg. Box, Dropbox, Google Drive, Sharepoint, Zoho*

Selecting well-known general collaboration software is easy and familiar, but starts you down the wrong path.

### Desired Benefit

Improved collaboration and access to documents.

### Shortcomings

- Little/substandard version control
- Often requires high customization to fit GC needs
- Requires constant work-arounds/waste

## 3. Non-Integrated, Legal-Specific Point Solutions

*eg. Agiloft, Apttus, Contract Express, Icertis, novatus*

Powerful specific functionality but expensive and silo-creating.

### Desired Benefit

Improved control or capabilities in specific areas like Contract Management.

### Shortcomings

- Medium to high customization and implementation costs
- Expensive per user costs
- Without being integrated into NetDocuments document management platform, creates new system and document silo

## 2. Generic Ticketing Systems

*eg. Atlassian, HelpCrunch, Zendesk, Freshdesk*

Helps you gain some control over incoming requests, but creates more downstream problems than it solves.

### Desired Benefit

Improved submission and tracking of client requests.

### Shortcomings

- Not designed to work with legal documents
- Attachments leave your secure repository/control
- Creates silo between requests and other systems/people

## 4. Legal-Specific - Multi-Function Integrated Platforms

*eg. Intapp, Onit, Simple Legal, Tap Workflow, Team Connect*

Powerful and scalable functionality at a price and complexity way above your capabilities.

### Desired Benefit

Smooth, seamless legal process support for large organizations

### Shortcomings

- Prohibitively expensive for small team
- Large change management effort
- Long Time to Value
- Requires ongoing sophisticated, specialized in-house IT support team

# Primary Recommendation | Focus on How You Create Value

How do you create value? What's your process? To understand how your department is viewed by profit-center thinkers in the company, let's look through that lens and consider your department a manufacturing unit. As such, your mission is to make more widgets (effective legal documents and counsel), of high quality, at the lowest possible cost, as fast as possible. And

while your market is captive, you still have to maintain a strong level of customer satisfaction.

With the objective of improving your unit's process and performance, one needs to first be able to map it out, understand what is being done, in what order, and identify opportunities for improvement.

## What do you make?

Documents (contracts, agreements, etc.) and advice that follow specific rules, and with applied wisdom and strategic foresight keep the company free from potential harm while meeting revenue, growth and profit requirements.

## What are the inputs?

Legal team input largely consists of human hours—though also include technological systems support, and physical plant.

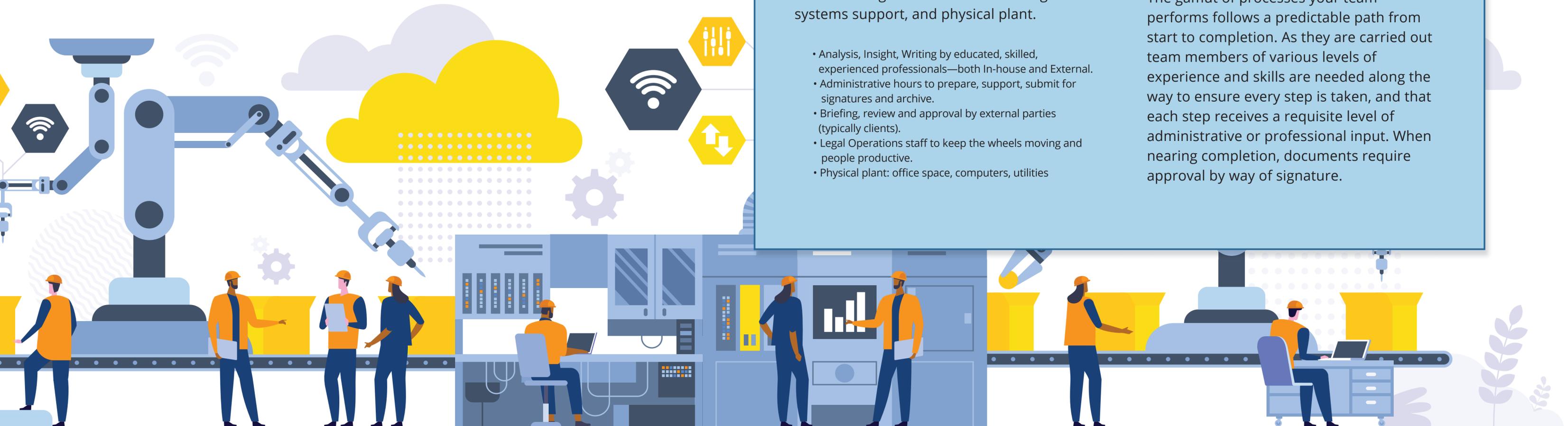
- Analysis, Insight, Writing by educated, skilled, experienced professionals—both In-house and External.
- Administrative hours to prepare, support, submit for signatures and archive.
- Briefing, review and approval by external parties (typically clients).
- Legal Operations staff to keep the wheels moving and people productive.
- Physical plant: office space, computers, utilities

## What are the costs of those inputs?

High hourly rates for the legal professionals. Comparatively lower admin/paralegal rates—although enough to attract and keep good skilled workers. Plus, opportunity and personnel costs caused by delays such as client schedules or waiting on input or signatures.

## What steps are taken?

The gamut of processes your team performs follows a predictable path from start to completion. As they are carried out team members of various levels of experience and skills are needed along the way to ensure every step is taken, and that each step receives a requisite level of administrative or professional input. When nearing completion, documents require approval by way of signature.



## Supporting Recommendations 2 - 7

### 2. Choose the Right Partner(s) | Your Success Insurance Policy

Choosing a partner(s) with legal-centric experience and efficiency bias to their approach and technology—will improve the chances of being a good fit for your needs. This partner will have tackled the challenges you face, in various operational cultures, and can draw upon that experience to your benefit. They can provide insight into avoiding pitfalls of negative second order effects.

In this way, you can more easily pinpoint where you have issues which may now be rationalized away. Once this is done, you can then layer in people-related considerations that are separate from the process flow or supporting technology concerns.

### 3. Prioritize Outcomes Not Functions

Putting the outcomes you want to create for stakeholders first, helps objectively focus your energies on fundamental process refinements. For example, maximizing service levels; or, minimizing client request wait times. Then you can turn your mind to how to layer on technology to improve your business results.

### 4. Avoid Detrimental Downstream Effects

Technology and production processes are elements of complex interdependent systems. Hence, one needs to think more holistically about the immediate consequences of actions taken, and the subsequent downstream, follow-on effects. Failing to consider second and third order effects can unleash chaos.

### 5. Manage Expectations of an Iterative Process

Communicating to all stakeholders involved that you expect to learn and evolve any solution along the way, sets a helpful expectation that the best solution will emerge only with time and the input of all concerned. Doing so will help reduce your personal stress and protect your professional reputation. Recognizing aloud that you don't know what you don't know yet, can relieve you from having to be 'certain' about the outcomes promised and path that will be taken.

### 6. Loop in Clients Early and Often

Your view of the objectives and outcomes are important, but so is the perspective of your end clients. You can accomplish your objectives in a myriad of ways, but the best way is one that minimizes effort and miscommunication for those clients. These can easily be avoided by including them in "experiments" that you are undertaking to improve service levels, and any beta trials you are going to engage in.

### 7. Pursue 'AND' Solutions, not 'Either/Or'

When choosing technology solutions, it's easiest to frame things as either/or choices. We could do this, or we could do that? But you don't have to settle for either/or. You can opt instead for AND. Look for what you like, and what you want to avoid, and see if you can create combinations where you get more of what you want, and less of what you don't. With today's technology, AND is a very real possibility.

# Your Challenges, Our Solution

NetDocuments, DocuSign and mercanix have individually been helping legal teams operate more productively for over 20 years. As a team, our strengths combine to bring the legal-sector leading cloud technologies and productivity, secure digitally-approved documents, and bespoke configuration backed by process change management consultation.

Together, our three enterprises deliver a seamless *AND* solution to legal operations challenges while opening opportunities to easily integrate with other departments and solutions.

## Legal Service Chain

Process Example, Operational Challenges and Solutions



### GC Operational Challenges

<ul style="list-style-type: none"> <li>• Hundreds of email requests</li> <li>• Requests are often incomplete</li> <li>• Everything required now</li> <li>• Nobody knows what's been done</li> <li>• No ability to prioritize.</li> </ul>	<ul style="list-style-type: none"> <li>• More emails to coordinate</li> <li>• No single source of truth</li> <li>• No visibility of load/availability</li> <li>• No defined process to follow</li> <li>• Documents hard to find/apply</li> </ul>	<ul style="list-style-type: none"> <li>• More emails to communicate</li> <li>• No clear responsibilities</li> <li>• No visibility of progress</li> <li>• More documents produced</li> <li>• Large management burden</li> </ul>	<ul style="list-style-type: none"> <li>• More emails for approvals</li> <li>• More attached documents</li> <li>• No visibility of approval or execution</li> <li>• Lack of clear accountabilities</li> <li>• Unexecuted documents a risk</li> </ul>	<ul style="list-style-type: none"> <li>• Executed product misfiled</li> <li>• Inconsistently classified</li> <li>• Hard to find/reference</li> <li>• Hard to schedule for review</li> <li>• Hard to learn from/reuse</li> </ul>
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### mot-r, NetDocuments & DocuSign Solution

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|--|--|---|--|--|
| <ul style="list-style-type: none"> <li>• All requests through online portal</li> <li>• Structured requests</li> <li>• Instant visibility</li> <li>• Automatic notifications</li> <li>• Prioritized and time stamped</li> </ul> | <ul style="list-style-type: none"> <li>• Assign workflow &amp; resources</li> <li>• Client &amp; team visibility</li> <li>• Automatic notifications</li> <li>• Real-time status</li> <li>• Clear accountabilities</li> </ul> | <ul style="list-style-type: none"> <li>• Clear required tasks</li> <li>• Clear accountabilities</li> <li>• Easily include outside counsel</li> <li>• Easy access to working documents</li> <li>• Structured process, yet adaptable</li> </ul> | <ul style="list-style-type: none"> <li>• Digital approvals &amp; signatures</li> <li>• Real-time status tracking</li> <li>• Escalations/notifications</li> <li>• Execution required to complete</li> </ul> | <ul style="list-style-type: none"> <li>• Execution ensured</li> <li>• Documents classified</li> <li>• Full history of actions</li> <li>• Full reporting for learning</li> <li>• Schedule future reviews</li> </ul> |
|--|--|---|--|--|



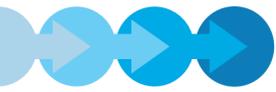
*mot-r by mercanix provides service portal, collaborative workflows, notifications, reporting and solution integration capabilities*



*provides electronic signature capabilities plus DocuSign Agreement Cloud*

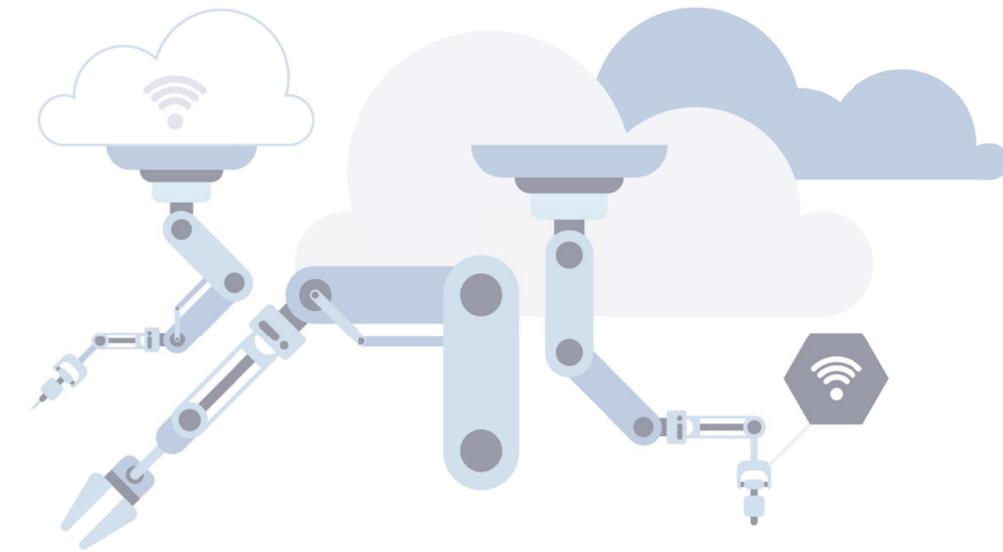


*underpins all by providing secure and searchable document and email management capabilities*



# What Do We Know? | We Can Help

We've learned more than a few things in the past 2 decades. We have worked with hundreds of GCs—helping them to overcome challenges. We look forward to sharing our legal service operations wisdom and capabilities—to help you optimize your legal service chain, reduce your stress, and increase your legal team's value to your organization.



## netdocuments

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## DocuSign

**World Leader in Electronic Signatures**

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## mercanix

**Creators of mot-r.**  
NetDocuments & DocuSign Partner

The mercanix team has been designing, developing and implementing cloud-based service solutions for over 25 years. With mot-r, our innovative Legal Service Chain platform, we are compounding the benefits of your NetDocuments and DocuSign investments.

- NetDocuments Implementations
- Process Mapping, Reviews and Refinements
- mot-r implementations
- Change Management
- Integration Services

To learn more, contact us at  
[www.mot-r.com/gcsolutions](http://www.mot-r.com/gcsolutions)