

Enterprise Legal Transformation Client Case Study



Client Challenge

- 1** The client carried a significant post-merger cost synergy target that required the reduction of the merged legal department's budget by over 30%. Doing "more with less" on any sustained basis was simply not a viable option. Transformation of the enterprise legal services delivery model was necessary to achieve these cost savings while ensuring there was quality legal support to the business at targeted levels of risk.
- 2** Given ongoing budget pressures, the directive was to move towards a more variable cost structure over the historical fixed cost model.
- 3** The client's operating model required an advanced technology platform to transform commercial contracting support in order to achieve the company's objectives.
- 4** Intellectual property, e-discovery, and immigration support costs were significant and not optimized.
- 5** The merged legal function lacked quality and cost-effective legal operations support.

UnitedLex Assessment

- 1 UnitedLex's team assessed the internal and external spend for each pre-merger legal department, including existing technologies, organizational structures, staffing models, specific roles, processes, and use of outside counsel to develop an actionable gap analysis against post-merger requirements.
- 2 UnitedLex created a strategic transformational roadmap to achieve the objectives outlined by the client's CEO, CFO, and General Counsel. This roadmap detailed the supporting business case, transition/implementation plan, and comprehensive change management approach.

UnitedLex Solution

- 1 Given the majority of the existing headcount resided within the commercial transactional support team, UnitedLex designed a solution to (a) handle existing deal volumes and account for growth with a targeted 40% reduction in global headcount and (b) minimize disruption in delivering commercial legal support to avoid impacting ongoing revenue generation.
- 2 To achieve the 40% headcount reduction, UnitedLex embedded key productivity enablers in its solution offering that included an advanced, cloud-based contracts platform.
- 3 To minimize disruption, a significant number of existing transactional attorneys and commercial negotiators from the merged legal function were on-boarded into UnitedLex and its affiliated law firm, Marshall Denning (established in 2017). Practicing lawyers along with other attorneys and commercial negotiators worked seamlessly together to support deal work in 26 countries.
- 4 All litigation, investigation support activities (e-Discovery), and immigration support were also transitioned as part of the UnitedLex solution.
- 5 UnitedLex assumed all the roles of a high-functioning legal operations group, including strategic direction, budgeting, law firm/vendor management, legal policies and procedures, and technology optimization (e.g., global deployment, user support, training, and system administration) with team members primarily located in the U.S. and India.

Business Impact Delivered

- 1 Commercial transactions support has been live since April 1, 2017 and UnitedLex flawlessly handled over 3,800 requests in the first two quarters. As a result, the client transitioned the remaining deal work -- for the largest/most strategic deals in excess of \$100M--to UnitedLex. Total savings from this new transactional support model accounted for the majority of the necessary budget savings (8 figures).
- 2 Over 200,000 legacy contracts were transitioned to the new consolidated and searchable contract repository.
- 3 The new automated workflow process integrated with SFDC and is used on a global basis.
- 4 All litigation, investigations, and immigration support is on track to achieve significant year over year cost reductions.
- 5 The transitioned and optimized legal operations team is fully interlaced with the client legal function, fulfilling the required supporting role on a day-to-day basis. Additionally, this team has primary responsibility for tracking and monitoring the overall performance of the legal function, including services provided by UnitedLex.
- 6 UnitedLex engages in monthly stakeholder governance meetings with the client's senior legal management team to monitor performance and address opportunities to further drive operational excellence.