



## INNOVATION AT WORK

# How Blakes Used a Custom Portal and Workflow Automation to Transform Commercial Contract Management for a Major Bank

## Summary

When the high volume of commercial customer agreements in a line of business caused capacity and budget issues in the legal department of a major bank, a top-tier national law firm wasn't their first thought for a cost-effective solution.

But some innovative thinking from Blakes convinced them otherwise, thanks to a proposal for improving efficiency and reducing costs via a customized collaboration portal and a team of lawyers staffed by inSource.

## Challenge

The sole in-house lawyer responsible for handling contract management in a commercial line of business at a major bank found that the high volume was making him a bottleneck in the process, holding up approvals and potentially putting customer relationships at risk in a context where requests for new and amended contracts must be turned around quickly.

Although the agreements in question were not highly complex matters, the large amount of correspondence required with the bank's sales team and account managers to complete each agreement also threatened to overwhelm the rest of the higher-level tasks required as part of the in-house lawyer's role.

Facing budget constraints, the client wanted to boost capacity and improve workflow efficiency in a cost-effective way.

## Solution

Building on her long-standing relationship with the client and intimate knowledge of its business and the regulatory landscape, Blakes Partner Bonny Murray worked with our innovation team to reinvent the contract management process for the line of business through a combination of legal technology and an alternative service delivery model.

At the heart of the effort was a customized collaboration portal built by Blakes using cloud-based software.

Following interviews with key people at the bank, our team developed an improved workflow to cut out unnecessary layers of communication and constructed an intake system that allows members of the client's sales team to initiate work directly on a contract by filling out a simple online form.

On the Blakes side of the portal, an automated workflow delivers new files to lawyers staffed by inSource — our fully integrated in-house alternative service delivery provider. Trained and supervised by Bonny Murray, this team of reviewers can handle ongoing requests for new agreements, renewals and amendments at the same level of service guaranteed to all Blakes clients, but on a more efficient and cost-effective basis.

Checks and balances are programmed into the system for quality assurance and accuracy, catching potential issues before a draft is submitted. Relevant stakeholders stay informed every step of the way through automatic notifications that are triggered each time an important step in the process is completed or a file changes hands.

**“We’ve taken the bulk of the work off the plate of their in-house counsel in respect of this contract management process, which solves a critical business problem efficiently. It’s been a big success, which could be replicated in other lines of business, within the bank and beyond.”**

*— Bonny Murray, Partner*

Meanwhile, all the communications about a specific agreement are stored in a centralized location, rather than fragmented across the emails of individual team members, creating a searchable repository for future tracking purposes.

An intuitive digital dashboard gives the bank’s in-house counsel and upper management a snapshot of work in progress, including the number of agreements newly opened or awaiting approval at various stages of the process, and the agreements that are already complete.

## Results

Upwards of 80 contracts flow seamlessly and speedily through the new process annually between bank staff and inSource lawyers, freeing up the client’s in-house counsel to take on higher-value work requiring his attention.

The Blakes innovation team has created a user guide and trained around 30 members of the bank’s sales and account manager divisions to use the collaboration portal, eliminating the need for more legal hires by the client.

Working to a fixed monthly fee — reviewed periodically — gives the client cost certainty for this high-volume work.

## Key Contacts

If you would like to learn more about this solution, please contact a member of the Blakes team:



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