

Scalable Growth for a Growing International Legal Team at ZS Associates, Inc.



In 2012, ZS Associates, Inc., a management consulting firm with more than 5,000 employees in 22 offices worldwide and a legal team of 23 attorneys and support staff, redesigned their contract process to meet the growing needs of its business. The legal team is responsible for the origination, review and negotiation of all client agreements, and like many in-house legal departments, increased requests for legal work saw the team growing rapidly. But current processes were inefficient and there was a need for tools that were scalable for a growing international legal team.

Despite employing only six attorneys, ZS Associates' contract process was based on paper. Paper "pink sheets," filled out by hand, were used for both matter tracking and executed contracts. "We wanted to hire attorneys in India to take some of the pressure off, but we needed a better way to share information and collaborate more efficiently," said Rachel Kempler, Associate Director of Legal, Commercial Transactions and Business Legal Support for ZS Associates, Inc. "Attorneys were also becoming more specialized and it was harder to know where each agreement should be sent."

Excel-based tools were originally used to track information from the paper files, with the help of legal team assistants for data entry. But the spreadsheet was not in the cloud so only one person could track contracts-in-progress at a time. For executed contracts, the team used a "homemade" Lotus Notes-based database, but additional part-time employees were needed to upload agreements to the database and there was no connection between matter tracking tools and the executed contracts database with executed agreements emailed to a central email box.

Working with technology partner Onit, ZS designed and implemented a "My Legal Requests" solution where matters needing legal review could be uploaded by any user. A link to the Onit dashboard was posted on the ZS intranet so it is accessible to all employees. Workflow is determined by the "type of request" and other fields collected through the solution. Based on the answers, the request is routed to appropriate members of the legal team who are charged with reviewing the agreement.

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There was an immediate decrease in turnaround time as soon as the new solution went online. Because many NDAs get reviewed by the ZS team in India, if someone in California uploads an NDA at 5 p.m. local time, the team in India will review it and likely return the reviewed agreement by the start of business the next day. "Reminding people of this type of efficiency definitely encourages them to use the tool more," said Kempler.

A second "Executed Contracts" solution was developed to manage executed agreements. It is accessed from the My Legal Requests solution, and it keeps previous versions emails and redlines linkable and searchable for future reference. "It really becomes an electronic file to see how the negotiations went and what its origins were," says Kempler.

ZS has also built other tools: a human resources solution, with limited access for more sensitive matters, and a TPA Compliance solution with links to the Executed Contracts solution for tracking expiration and data destruction.

Within the last two years, the offices of ZS Associates also moved to an open workspace environment to cut costs and improve collaboration among its workforce. Taking a step beyond the open office trend, ZS also practiced hoteling, or hot desking, making office space and desks shareable on an as-needed basis. But with the added efficiency and flexibility also came the pressure to go paperless. Incorporating the tools developed with Onit helped to further achieve the goal of electronic files replacing paper ones.

In the six years since working with technology partner Onit, the added tools have enabled easier collaboration across legal teams, access refinements to the original request solution, simplified creation of daily reports and continued improvements in their process.

For other legal departments looking to find efficient solutions and transform the way they work, Kempler suggests taking the opportunity to address pain points to improve efficiencies instead of seeking to automate the process already in place. "Flexibility is the key," she says. "Choose a platform you can adapt and evolve as your needs change and your organization grows."



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