

Gartner for Legal, Risk & Compliance

**Case Study:
Incremental
Automation Plan
(TE Connectivity)**

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- Company Name: TE Connectivity
- Industry: Electronics
- Headquarters Location: Schaffhausen, Switzerland
- Revenue: \$14 Billion (2018)
- Employees: 80,000 (2018)

Overview

TE Connectivity's head of legal operations identifies a long-term goal for automation based on its legal department goals and breaks that vision into small components that can be implemented incrementally. This allows legal to implement automation with minimal workflow disruption and reduces the investment needed in any one automation solution.

Solution Highlights

- Department Priority-Oriented Automation – TE identifies a desired end state for automation tied to its legal department goals by targeting workflows with the greatest impact on key departmental metrics.
- Automation Candidate Prioritization – TE maps the selected workflow into discrete components that can be individually automated with minimal workflow disruption. The company tests automation on the highest-volume, lowest-risk component first.
- Automation Solution Identification – TE identifies the capabilities needed to automate each workflow component and the tools to provide those capabilities.
- Planning From the End Goal – TE identifies existing resources that can be used to automate each component so only small additional investments must be made to advance to the next step toward the long-term automation goal.

Challenge

As part of a companywide initiative to work at the speed of business while making it easier for customers to do business with TE, the legal department sought to make legal services delivery more efficient and business growth oriented.

With 180 members of TE's legal department dispersed across several different countries, many repetitive processes throughout the department were treated as unique, primarily due to largely manual processes and "silo-ization" of offices supporting specific business units. TE's legal department wanted to deliver cheaper, faster and better legal services while supporting the enterprise goal of making it easier to do business with TE. So, the legal department needed to find an automation solution that could streamline its processes and make legal more accessible to business partners without causing significant disruption to current workflows or requiring a significant resource investment.

Department Priority-Oriented Automation

Identify workflows where automation would have the greatest impact on department goals.

TE Connectivity's legal department began by confirming its goal for the year – to enable business growth and efficiently and effectively manage risk. The team then looked to the legal department metrics scorecard to decide which metrics it should target with automation for the greatest impact on its goal.

Targeting High-Impact Metrics

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TE Legal Department Goal (Abridged):

**Enable business growth ...
efficiently and effectively manage risk**

Department Metrics

Effectiveness (Business Alignment)

Speed (Matter Cycle Time, Number of Hours Spent per Task)

Employee Engagement

Recoveries by Legal Department

Cost Savings of Legal Department

Source: Adapted From TE Connectivity

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The team brainstormed workflows that would contribute the most to each metric. To identify workflows that impact speed (such as matter cycle time and number of hours spent per task), TE used brainstorming questions including:

- Which workflows take staff the longest to execute individually?
- Which workflows bring in the highest volume of work?
- Which workflows are slowed down by handoffs?

Conducting this exercise created a shortlist of workflows that had a significant impact on the department's speed metric, such as customer contracts, review of marketing materials, nondisclosure agreements (NDAs) and vendor contracts. The team also conducted a similar exercise to identify workflows that would target its effectiveness (or business alignment) metric, including:

- Where can we empower the business with self-service tools?
- What workflows involve the most direct interaction with business partners?
- What workflows have the closest connection to company revenue?

The team then cross-referenced the two lists of workflows to see which workflows came up most frequently and would therefore have the most significant impact on the department's goal. By doing this, TE's legal team identified NDAs and customer contracts as the two workflows it should automate first to make progress toward its department goal.

Automation Candidate Prioritization

Deconstruct the workflow into individual automatable components and prioritize by risk, volume and repeatability to identify a starting point.

Understanding it would be too disruptive to attempt to automate the entirety of its selected workflows at once, TE's legal team looked for ways to split the NDA and customer contract workflows into smaller components that could be automated individually.

The team started by looking for the subset of NDAs and customer contracts that would be the best candidates for testing a new automation solution. The team identified matters that use TE paper and those that had a lower comparable contract dollar value as good, low-risk candidates for automation solution testing.

The team identified which process steps of the workflow — intake, drafting, negotiation, review or execution — should be automated first by prioritizing the most repeatable steps.

By testing automation on a step with high repeatability, such as contract intake or drafting, the team started with processes that already developed some level of standardization and are therefore easier to automate. This also ensures the automation solution has numerous opportunities to run so the team can catch any issues early on.

Starting with low-risk, high-volume activities meant the new automation solutions would free the most additional capacity for department staff without exposing TE to much additional risk.

Identifying Low-Risk, High-Volume Work Items

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	High Volume	Medium Volume	Low Volume	
Low Risk	NDA on Our Paper	Small Customer Contracts		→ Automate First (Fast Track 1.0)
Medium Risk	NDA on Customer Paper			
High Risk			Large Customer Contracts	→ Automate Last (Fast Track 4.0)

Source: Adapted From TE Connectivity

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Through this exercise, the team identified NDAs on TE paper as the lowest-risk and highest-volume contract type – this was the starting point for TE’s new efficiency initiative, which it calls “Fast Track.” Once the team decided Fast Track 1.0 would automate intake for NDAs on TE paper, it could plan the automation of the remaining workflow components. That way, high-risk, low-volume, lucrative customer contracts would be the last contract type to be automated in Fast Track 4.0, the final phase of the plan.

Automation Solution Identification

Identify the capabilities needed to automate each workflow component and the tools that can provide those capabilities.

To find solutions that could automate one or more components of the contract workflow, TE identified the capabilities it needed to automate each component individually. The team consolidated them into a master list of capabilities that dictated which tools legal could use to automate the contract workflow as cost-effectively as possible.

Identifying Capabilities Needed to Automate

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Source: Adapted From TE Connectivity

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The team looked for tools that already exist within the department or elsewhere in the organization that could be adapted to its needs with limited additional investment or technical support from IT. For capabilities TE did not already have, the team looked to vendors that already worked with the company that would not need additional security vetting. The team also considered emerging vendors that could offer a cost-effective way to test out new capabilities.

The legal department and its internal customers already used Microsoft SharePoint to support current workflows, so the team decided it could use this system as a basis for the automation solutions it creates. In addition to the existing SharePoint system, the final end goal for contract automation would require:

- A contract review tool from a vendor
- A bank of standard clauses to supply the contract review tool
- An intake form to collect information about contract requests upfront
- Integration between SharePoint and the review tool to make the workflow seamless

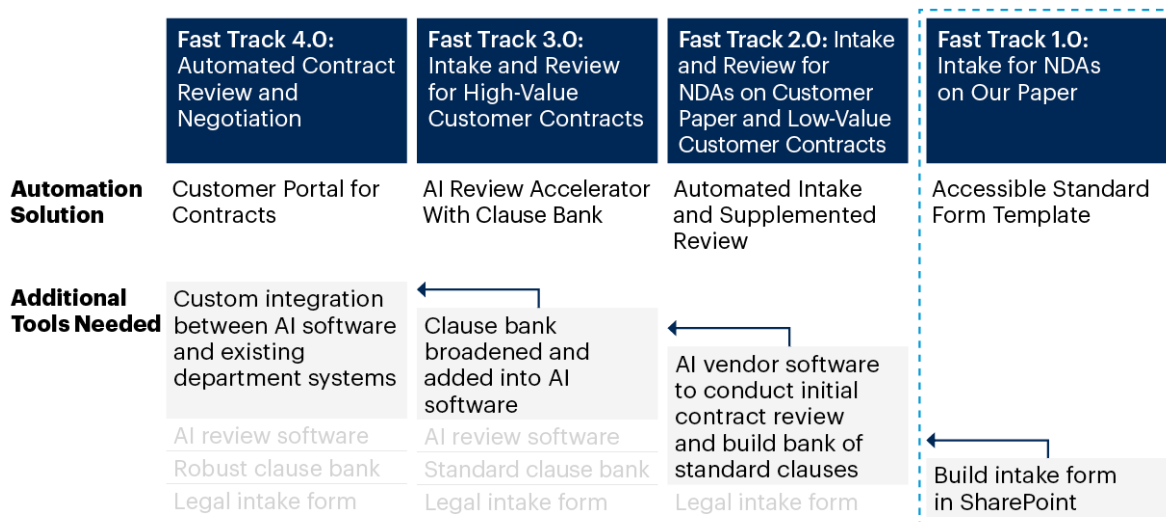
Planning From the End Goal

Sequence automation investments so each component can be automated with minimal additional resource investment and resources to reach the end goal are accumulated over time.

To avoid the need to make a serious resource investment at any step of its plan, the team started with the end goal of automated contract review and negotiation and worked backward to sequence the remaining workflow components. Intake forms can be accessed directly from portals built in SharePoint, so the team realized it would be able to automate intake for NDAs on TE paper – Fast Track 1.0 – using its existing SharePoint system.

Gradually Building Automation Resources

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As the team progresses along its planned sequence of automation solutions, it will continue to tweak tools from previous steps as needed to ensure the automated workflow runs smoothly. Once the team has automated its first three workflow components, it can reach its end goal of completely automating contract review and negotiation simply by introducing a final integration between the vendor AI tool and its existing department systems in Fast Track 4.0.

Results

Implementing automation one piece at a time allowed TE Connectivity to **reduce contract drafting and review cycle time by nearly 50%**.

Recommendations

Heads of legal operations who want to implement automation in the legal department without significant workflow disruption should:

- Identify the workflows where automation would have the most impact on department goals to plan an automation project that generates tangible improvements.
- Deconstruct workflows into smaller components that can be implemented individually. Prioritize automating high-volume, low-risk, repeatable workflow components first to create many opportunities to tweak the automation solution.
- Identify tools that have the capabilities needed to automate each workflow component to understand what tools will need to be developed during the automation project.
- Plan the automation of each component so only small additional resource investments need to be made for each component.

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