"It's Transformational."

How Yahoo Legal and ThinkSmart teamed up to automate Legal Ops workflows on a global scale.

THE CHALLENGE

As an enterprise grows, so do the demands on its legal team, and the inefficiencies, costs and dangers involved in using manual workflows scale up accordingly.

It's no surprise that companies competing in tech sectors recognize this problem. They're constantly striving to achieve greater agility and productivity, and workflow automation is key to that.

Yahoo Legal is an outstanding case in point. It had thousands of concurrent Legal Ops workflows and processes underway, as you'd expect from a business of its size, all vital to the legal department and various business units. They needed a workflow automation solution that could save time, reduce friction, drive corporate compliance, ensure visibility and allow for auditing actions. As we said, for *thousands* of workflows.

We're glad to say that Yahoo Legal found their solution with ThinkSmart.

> **"TAP lets us automate any process in any area, whether it's HR, Finance, or Sales. This is a very powerful way to improve efficiency and reduce costs."**
>
> Jeff Franke

YAHOO'S SEARCH FOR A SOLUTION

The Yahoo legal team includes more than 150 legal professionals, addressing 30+ areas of the law on a 24/7 basis for a truly global corporation. Its General Counsel employs a team of legal ops professionals to support process optimization, budget management, outside counsel engagement, policy compliance, e-billing, contract management and more.

Workflow and process automation was always a goal for this team. The ideal, business-critical solution would eliminate email, texts, and other tools, expediting workflows and processes while also serving as an unofficial repository for requests, approvals, and completed agreements.

Jeff Franke, Senior Director of Global Legal Ops at Yahoo, reviewed many business automation platforms. But none met his team's demands.

"None were fully functional and easy to use," in Jeff's experience. "There are good industrial-strength solutions out there, but those require extensive IT support and don't allow for rapid development of new workflows by people on my team or others in legal. We need to be able to create and modify a workflow on the fly because policies, processes, and templates change all the time. And we must be compliant."

"We needed a business automation solution that was flexible and had a light footprint," Jeff explains. "It's essential that my team use and manage the platform with near zero support. And **we needed a a solution that was cloud-based.**"

YAHOO LEGAL'S CHOICE? THINKSMART

In 2011, at a meeting of the Corporate Legal Operations Consortium, Franke was introduced to ThinkSmart's Transaction Automation Platform (TAP). Paul Hirner, ThinkSmart's CEO, demonstrated how to build a fully functional workflow in real time, and Jeff was impressed with its ease of use, flexibility, end-to-end process coverage and full integration with industry-standard electronic signature solutions like e-Sign from Adobe and DocuSign. He felt TAP would let his team implement workflows quickly, while reducing the need to involve its lawyers in any number of processes.

At the start, Yahoo's Legal Operation team worked side-by-side with ThinkSmart to create a development roadmap for customizing TAP to their needs. One early step on that path was to define and test customizations of the user interface to enhance its friendliness and usability. Another was

to focus on immediate feature additions, including data and documentation that instructed users about the purpose of a given workflow.

TAP's **ease of adoption and simplicity of use** was apparent from the start. Immediately after launching TAP, his team automated two workflows with no IT assistance whatsoever, except to connect TAP to Yahoo's single-sign-on solution and its HR system.

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> Except for assistance integrating TAP with a human resources database to populate certain fields, and linking to our employee directory for single sign-on convenience, we have never needed help from IT."

Jeff Franke

CUSTOMIZATION & IMPLEMENTATION

One area where Jeff committed to working closely with ThinkSmart was in extending TAP functionality to include "transaction management," as he calls it: the ability to add workflow-related notes that can be modified on an ongoing basis without impacting the auditability of requests and approvals, helping with SOX compliance.

"With the note-taking, transaction-focused addition, TAP has become the complete workflow automation solution that we – and all sizable enterprises – need to fully address a wide range of processes, Jeff asserts.

"Where we once relied on multiple, non-integrated processes and tools, with email often serving as the repository for requests and approvals, we could now manage all that easily in one place with a user-friendly interface."

Other areas where TAP transformed Yahoo's legal workflows?

Accelerating engagement on time sensitive matters

"Right out of the box," Jeff says, "we tackled a significant and complex process: creating an effective alternative to our spend authorization process for engaging law firms. The challenge was how to bring on outside law firms quickly enough to help with time-urgent matters and comply with our spend approval process. Traditional P.O. approvals processes can take too long."

Yahoo engages outside counsel hundreds of times every year, and securing spend approval to help get them started involves financial and compliance requirements. But "many matters, like litigation matters, typically require attention quickly, without time for delays," explains Jeff. "Our existing approval process was too time consuming and didn't offer a great way to store approvals for easy retrieval. So we automated the entire process using TAP to identify a legal matter, create a budget, all while following our global authority matrix with easy access to approvals."

It's a workflow similar to those at many large companies. At Yahoo, TAP allowed fast routing and core approvals of key legal expenditures within an auditable, SOX-compliant process.

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Freeing lawyers from dealing with NDAs

Another manual process Franke's team tackled early on was automating the process for securing a Non-Disclosure Agreement. Leveraging the TAP development environment, Yahoo created an NDA portal, covering 20+ countries and leveraging Chinese characters, that's used by hundreds of employees annually, but frees lawyers or paralegals from being bogged down in hundreds of transactions.

"Now, it is rare that a lawyer has to touch an NDA. Users can initiate and complete the NDA workflow on their own from a link on an internal Yahoo website, and they track the progress of each NDA," says Jeff.

Creating a new trademarking tool

When Yahoo IT advised his team that the trademarking tool they'd used for years was about to be mothballed, it was a non-issue, thanks to TAP. "I turned to one of the legal operations professionals on my team (someone with no IT background), and she worked with the trademark team to define the process, identify additional desired features and then built the workflow," Jeff explains.

She and ThinkSmart also migrated all existing trademark data to the new solution. Total time to completion? Only 4-5 weeks. "We created a workflow that manages trademark applications and reviews by our trademark team, helps manage the transaction, support the brand, and complete all U.S. and international filings. This is used every day at Yahoo," Jeff says.

THE RESULTS? "TRANSFORMATIONAL."

Yahoo has made the platform fundamental to its legal operations. "TAP has allows us to save thousands of hours of costly staff time every time we use it. It also lets us engage faster and more effectively," says Jeff Franke. "TAP is a cornerstone of our legal IT infrastructure. It would be one of the first tools I'd implement if I were starting from scratch. It's transformational."

He thinks TAP should play a role beyond legal operations, too: "IT departments would do well to adopt TAP for a standardized, cost-effective approach to the many use cases for internal clients that can drive huge efficiencies through self-service options."

Jeff gives credit for TAP's success to the ThinkSmart team behind it. "It's great to have a technology platform that helps drive efficiency while providing great solutions to various functions. It's even better to have a technology provider that works hand-in-hand with us to evolve the tool with

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> *Almost everything that takes place in a company is a process. Most workflow tools, however, address processes in one specific area. TAP lets us take all those that are not in a set category and automate them. It can reduce the number of automation applications needed."*
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> Jeff Franke

critical features and functionality, as well as bug fixes, on an ongoing basis.

"We have a phenomenal relationship with ThinkSmart: **they care and they listen and they act.** It's amazing and makes our jobs at Yahoo Legal easier and better. How often do you get a tool that does just what you want and have the vendor asking what else they can do to improve – and then actually doing it?"

THINK SMART

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