

April 2019

Legal Design Challenge

Scenarios to improve contracting



A collaboration between DWF, LEx Open Source, Radiant Law and Wavelength Law



The Legal Design Challenge

In March 2019, inspired by the idea of using collaboration and design principles to improve contracting, DWF, LEx Open Source, Radiant Law and Wavelength Law hosted a Legal Design Challenge.

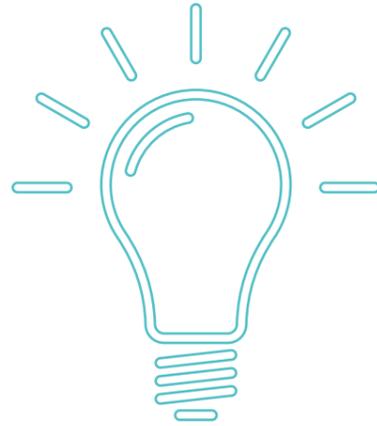
Attendees from a wide range of in-house legal teams, law firms and legal service providers came together alongside procurement, contract management, innovation and design experts to identify problem areas and share their ideas on potential solutions.

As part of a commitment to making this know-how open source, this publication is our way of sharing the findings.

The outputs are designed to be a starting point that can hopefully kick start a wider range of activity, which utilises the value of collaboration and design principles to improve contracting in the industry.

Anyone can take these outputs away to use in their organisation, either as they are or as a basis that can be tailored or improved further. Equally anyone is free to discard the outputs but use the design approach and tools to create something different.

All that we ask in return is for people to build on the momentum that has been created, carry on the conversation about the value of design and keep collaborating to improve contracting.



“The outputs are designed to be a starting point that can hopefully kick start a wider range of activity...”

Six scenarios to re-design contracting

We asked six diverse teams to think about the key challenges in contracting and identify areas to re-design, here are the scenarios they came up with.

- 1 Making sure the right information is available to the right people at the right time.
- 2 10x improvement in the time it takes to close the contracting process.
- 3 Making sure business owners find it easy to implement the contract roadmap post signature.
- 4 Educating key teams in the business to ensure they have a simple and clear articulation of the ongoing obligations.
- 5 Making sure there are clearly understood rules and more frictionless interactions.
- 6 Making it easier to manage the contract by tracking the data.

First things first

To kick start the challenge we gave a sample contracting lifecycle to each of the six teams. The lifecycle aimed to cover the major activities from end to end and the teams were asked to review and add their comments, thoughts and additions.

Contracting Lifecycle			
Contract strategy and selection	Contract creation and execution	Implementation and management	Exit/renewal
Strategy/business plan	Contract request/authorising	Systemise and monitor obligations and performance	Variations
Market analysis	Review and approval	Risk and dispute management	Termination plan
Commercial position including redlines	Negotiation of contract and commercial terms	Manage changes, renewals and improvements	Renewal process
Vendor selection	Award	Governance	

- Pricing and risk decisions run through the lifecycle*
- In reality governance runs along the lifecycle*
- The management of documents, data capture and monitoring are important throughout the process*
- It's important to consider the different stakeholders and what they want to achieve from the contracting process e.g. finance, business team, procurement, sales, legal, data, compliance, IT, security*
- With multiple owners and stages, corporate memory is an important element*
- It's important to consider specific external regulation input which can drive elements of the process and differ from industry to industry*

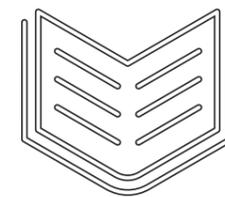
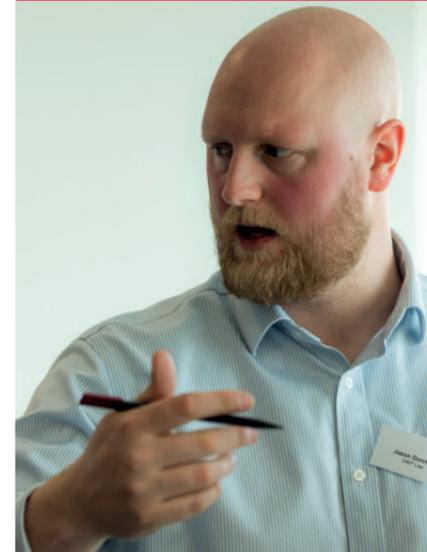
The Workbook

With all the teams agreed on what the base contracting lifecycle should look like and include, the challenge moved on to applying design principles and a sequence of tools.

The aim was to identify areas across the contracting lifecycle that could be improved and suggest practical ways to do it.

This section recreates the workbooks that each of the teams used on the day for the design process. The outputs are unedited and unvarnished, with the aim of showing how the tools were used and the wide range of outputs that came up across the teams.





The Workbook

Scenario

1

1 Use the problem statement sheet and the 'fishbone' diagnostic tools to identify the problem areas, desired outcomes and underlying causes.

Problem statement: Information given to the business requires multiple instructions from multiple stakeholders.

Desired outcome: Right information to the right people at the right time with an audit trail by clause.

Problem causes

Mindset		
Lack of ownership	Lack of prioritisation	My way is the right way
Loss of interest	Lack of collaboration	No buy-in to change
Must win, I know best attitudes	Not seeing the big picture	Understanding who makes the decision
No shared understanding of risk profile and alignment	No clear objectives or too many conflicting objectives	Reward structure drives inconsistent behaviours
Process		
Personal vs. business objectives	Need for speed vs. risk profile	Regulatory challenges
Value of retaining corporate knowledge	Politics between departments	Competing priorities
Too much top down decision making		
Tech		
No data strategy/ limited data captured	Lack of integration/ duplication of effort	Too much communication by email
No single source of truth	Legacy ways of working dominate	Tech confidence/need for training
No central record against action	Document version and control	Data security concerns
No data strategy/limited data captured		
People		
People don't understand their instructions	Information provided by different people in different formats	Not enough good project management
Competing requirements in terms of time and workload	Different skill requirements to achieve outcomes not recognised	Corporate knowledge can create single points of failure
Unclear roles and responsibilities	Input required from a wide range of people	Unsure who is making the decisions
Lack of ownership	Different interpretations	Fear of making decisions
Not working in a repeatable and predictable manner		
Process		
Internal process vs. external process	Different documents in different places	No identification of decision making roles
No one process fits all	No standard operating model or process owners	More accountability needed when the process isn't followed

2

Brainstorm as many ideas from everyone in the team and create a list. At this stage no idea is a bad idea so everything should be captured.

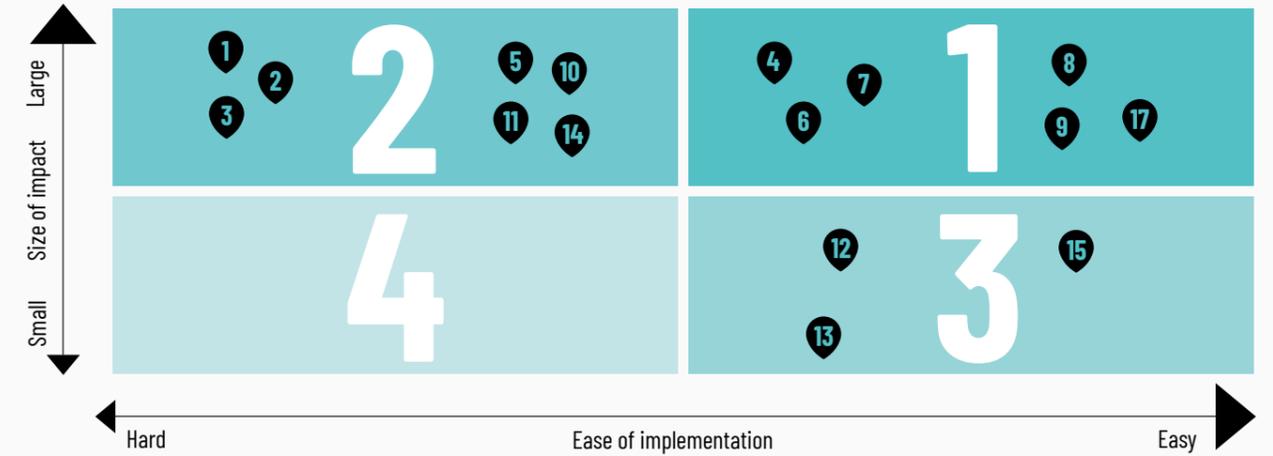
Ideas for potential solutions

- Standardised data - industry standards, schema, data structure, taxonomy, ontology that starts to form the building blocks.
- Industry contract standards - external knowledge that needs to be incorporated into considerations as an 'agreed basic'.
- Better knowledge management (collate know how, knowledge share, platform).
- Leadership training to help frame how business is transacted and risk managed within the organisation. How to drive best practice and considerations.
- Define a legal team's value proposition (in house) and publicise.
- Refining roles - approval, responsibility and accountability within the business as 'go to' include extent of remit.
- Governance framework - ownership and accountability that supports delivery of contracting framework.
- A formally articulated business strategy - golden thread that runs through the activity.
- Playbook for job of work that draws together key measures shared continuously throughout the contract lifecycle, that articulates middle ground together with deal breakers/redlines, key contacts and dependencies, decision makers i.e. all material info in one place.
- Object orientating, clause auditing and workflow platform that allows business to drive based on common ways of working that manage the exceptions driving value.
- Standard operating procedures - embedding process for driving consistency and then automate in areas to then overlay technology such as buzzword subject.
- Culture mapping and identifying issues/blockers across the organisation to get a clear view of the organisation 'as is' to help the future 'to be'.
- Collaboration platform to sit on top as an enabler of ways of working, as a single way of working and exchanging.
- Change management and continuous improvement methodology within agile environment that underpins the way that the business needs to work.
- Rewards linked to business objectives that drive behaviour.
- Legal input in the room at the start of an engagement - understanding the value from the outset.
- Collaborative decision forums - sharing best practice and agreeing common approaches that can be scaled.

3 Use the Impact vs. Effort matrix to help to prioritise the ideas on the list. Ideas that fall into box 1 have the best chance of success. Anything that falls into box 4 should be discounted.

Prioritisation

Plot numbers left onto matrix below



4 Get the whole team to vote on the ideas in box 1 and choose a maximum of three to work on in more detail. Use the solution grid to think about the actions that need to be taken to deliver the solution.

Bringing the best ideas to life

Solution	People	Process	System	Other
Standard operating procedures.	Engage with people at the coal-face to understand the impact of their work, understand the blockers, the contribution that is made and the connections across the business. Map customer journeys with pain points overlaid. Understand the 'so what' of the activities and the drivers/motivations.	Define, measure, analyse, improve, cement. Document the 'as is' and the 'to be' based on an understanding of the target operating model that brings together all inputs.	Aim to automate repeatable and predictable tasks. Design system and architecture that builds towards best solution but ensures momentum. Don't let perfection be the enemy of the good. Base line product should allow 'add-ons' for AI (in whatever format) as they are developing.	Decide the priority for approach. Pick the area or subject matter and divert resource to support the activity. Understand that this change is fundamental to business change. Understand the knowledge that is being used and aim to capture as build.
Project management toolkit.	Recognise the skill set and value that project management can bring. May be dedicated resource or skill set. Building out the multi-disciplinary teams. Skills needs to be extended past mandatory Prince 2 training without any real life application.	Tool kit should be a set of basics that apply universally and then varied by business area/activity to deal with the exceptions. System needs to be integrated with finance and reporting to give an umbrella view and 'value add'.	System agnostic but it must be complementary to existing architecture. User defined and input from users along the way. Not a top down solution. Also identify the gaps ahead of time of what it cannot do rather than focusing on what it can do to the exclusion of all others.	Value chargeable versus overheads may influence how the business responds to change. Key to success is adoption and integration to ensure that they are aligned. Recognise the contract activity is a mini project that has a start and finish and ability to learn continuous improvement methodology.
Legal engagement at the start of the contracting process.	Training deal makers about what they can do (rather than what they must not do). Introduce a single point of ownership. At the start this may be about people but over time that engagement may become automated.	Kick-off and regular stand ups to track progress. Understand and address the current ways of working and knock down blockers. Consensus building.	Flag for legal engagement based on deal value or involvement of procurement based on business rules. Create baseline with intention of moving on to self-service contract builder that sees legal engagement as a value add.	Business has to support the change of stakeholders and approach for this to be successful. Engage with leadership and decision makers and find a pathway to cascading framework.

Scenario 2

1 Use the problem statement sheet and the 'fishbone' diagnostic tools to identify the problem areas, desired outcomes and underlying causes.

Problem statement: The contracting process takes too much time.

Desired outcome: 10x improvement in time it takes to close a contract.

Problem causes

General	
Turns of documents (mismatch of expectations)	
Unreasonable and irrelevant terms of the first draft and response	
Drafts are getting stuck in inbox	
Pointless arguments caused by lack of empathy and unreasonable positions	
Tech	
No tech	
Gap in tech	
Lack of tech integration	
Contract terms	
Unreasonable terms of the first draft and response	
Lack of market standards	
Contract is too long with irrelevant terms	
Data	
Lack of storing knowledge	
Document centric contracting	
Insufficient data to progress	
People	
Poor understanding of implications	Too many egos and no compromise
Capacity	Poor communications
Incentives of participants	Not engaged
Conflicting positions	Silo mentality
Process	
Lack of deadlines and false deadlines	
Too much/lack of process	

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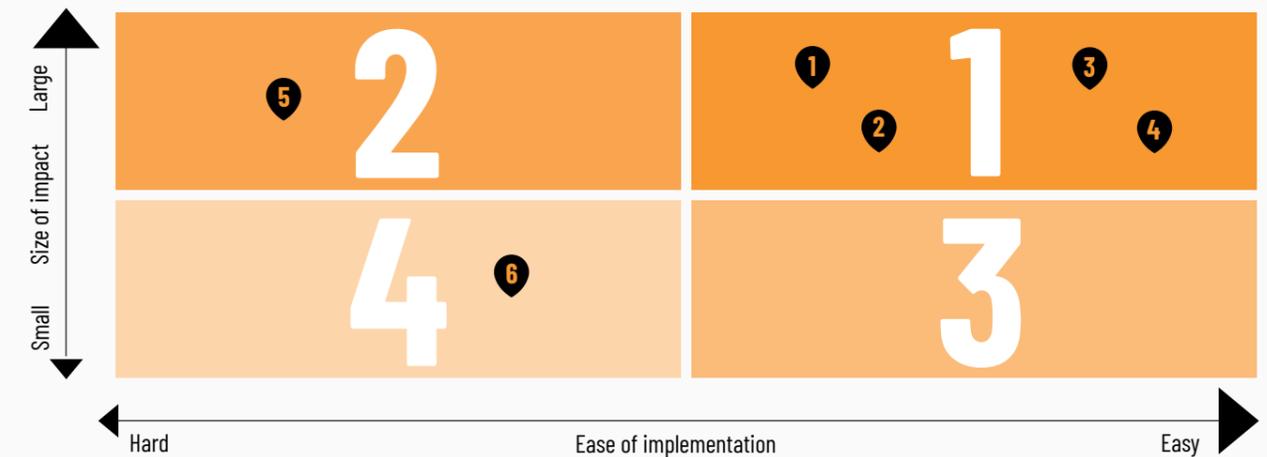
Brainstorm as many ideas from everyone in the team and create a list. At this stage no idea is a bad idea so everything should be captured.

- 1** Assisted business negotiation.
- 2** Better first drafts (short, clear, reasonable, relevant).
- 3** Incentives to speed up the contract (risk vs. delay).
- 4** Explicit cost of delay.
- 5** Industry standard terms.
- 6** Negotiation platform.

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Bringing the best ideas to life

Chosen solution	People	Process
Assisted business negotiations (playbooks, templates, online instruction forms, term sheets) - i.e. get the business to close as much as possible.	Agreed approach across sponsor, sales, legal, procurement.	DMAIC (define, measure, analyse, improve, control). 1. Identify and prioritise target deals 2. Identify key issues 3. Map out business positions and document 4. Educate business
Better first drafts (short, clear, reasonable, relevant).	Agreed approach across sponsor, sales, legal, procurement.	Same as above, plus update first the standard terms using quill and glass of wine and GC and business blessing to go for it.
Incentives to speed up and explicit cost of negotiations.	Agreed approach across sponsor, sales, legal, procurement.	Price the cost of delay, build an insurance model for the risk positions taken. Collect data and make explicit the value of respective contracts to allow triage. Agree at the senior level the risk appetite and give permission to be reasonable. Use nudge to encourage behaviours to speed up contracting.

Scenario 3

1 Use the problem statement sheet and the 'fishbone' diagnostic tools to identify the problem areas, desired outcomes and underlying causes.

Problem statement: There is an ineffective transition between contract execution and implementation, leading to customer dissatisfaction, loss of revenue/profit and increased risk.

Desired outcome: Business owner finds it easy to implement the contract roadmap.

Problem causes

People	
Lack of accountability	
Inconsistent handover of responsibilities	
Staff turnover = loss of key	
Communication with inconsistent language	
Process	
How contractual change happens in the real world isn't how it appears in the process map	The 'why' of a negotiated position often isn't captured
Important information is lost in contractual complexity	Not enough learning from failure
Contracts difficult for non-lawyers to understand	Contracts not designed for practical implementation
Transition to delivery teams is too often an after thought	
Technology	
Tech solutions are not often embraced (too much is still via email)	
Multiple systems	
No single repository	
Obligations not visible	
Rubbish in, rubbish out when it comes to data and information	
Multiple business systems and tech	
Motivation	
No handover of responsibility	
No consequence recognition - not part of role	
Sales team bonus structure doesn't encourage good practice contracting	
Benefit of ongoing contract management not understood by lawyers leading transactional elements	
Contract often not aligned to bigger business drivers	

2

Brainstorm as many ideas from everyone in the team and create a list. At this stage no idea is a bad idea so everything should be captured.

- 1 A method to understand the delta from the norm.
- 2 Better tools for extracting data from contracts.
- 3 Take the output and make the contract easier in the future.
- 4 Identify the key data points and capture them in a consistent way.
- 5 Upload the document to central and easily accessible source for ongoing management.
- 6 Post contract questionnaire to encourage continuous improvement.
- 7 Education and earlier involvement of the delivery team.

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Prioritisation

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Bringing the best ideas to life

Solution	People	Process	System	Other
Identify key data points and capture them.	External specialists to design and train people on the processes. Understand the users and the level of detail needed. Understand and map the stakeholders impacted by the design solution. May need new role of super-user who can work across the different functions.	Business process mapping.	Text extraction tools to extract key terms from the signed contract. Then 'survey monkey' to understand the 'essence' of the deal and why we arrived at a position in the contract. Then have a structured database, which could be augmented and end into different systems. Slice and dice this information for different business users. Push some information to business users in the form of e.g. calendar notifications.	May work best in the first instance on high volume agreements with some variances.

Scenario 4

1 Use the problem statement sheet and the 'fishbone' diagnostic tools to identify the problem areas, desired outcomes and underlying causes.

Problem statement: There is a disconnect between the business and legal teams throughout the contract process.

Desired outcome: A collaborative approach that leads to a simple and clear articulation of obligations for all involved.

Problem causes

People
Interpretation: Contracts not easy for readers to navigate and understand what they mean for them because of complexity, variables and legal language
Lack of empathy: No shared understanding of each other's objectives Perhaps due to conflicting priorities (risk/profit)
Siloed teams: Different ways of working. Not all areas of the business are involved throughout the lifecycle
Process
No agreement/tracking/visibility of end to end process: Not documented, too much complexity, volume and variety of contracts, no process owner
No standard terms agreed: No ability to take standard terms and special conditions and variables. Seen as anticompetitive or conflict of interest. Time consuming
No retrospective/live feedback: Everyone focused on the next delivery/no one updating the process
No visibility: no governance model/silos/no collaborative working
Technology
Complex tools: Limited training/not enough people trained/training documents are not designed for business users
Not integrated: Tools are not integrated with other systems used by other parts of the business e.g. salesforce. System silos
Mindset
Lack of joint ownership: Attention to contract ends after signature and incentives and remuneration are not aligned. What is important to the business is not understood
Lack of trust: No empathy to each other's priorities
Data
No collaboration: No agreed data points/agreed success metrics
No joint responsibility for defining and tracking the data points because of different priorities
No process for tracking data overtime because SLAs and performance metrics have not been agreed, no ownership of data and no visibility

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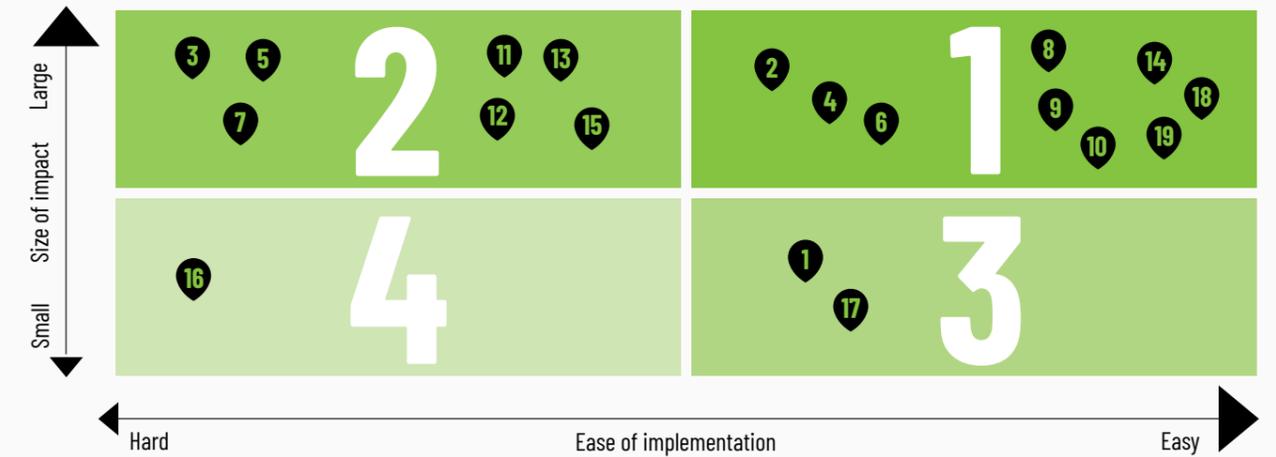
Brainstorm as many ideas from everyone in the team and create a list. At this stage no idea is a bad idea so everything should be captured.

- Business questionnaire to produce standard commercial terms.
- On-boarding initiation checklist - pre-signature- who, key business success factors, project initiation document, key stakeholders, responsibilities, risk appetite, contract objective.
- Contract metrics dashboard.
- Collaboration managers for each function with an agreed 'Contract Success Approach'.
- Customisable metrics matrix.
- Online 'day in the life of' user experience game.
- Visual, engaging training materials.
- Playbook for contracts.
- Top ten obligations in plain English.
- End to end process analysis and one-page dashboard framework - live and continually updated throughout process.
- Single source of data, agreed data points.
- Measurement metrics.
- Contract progress visual.
- Learning programme to create more 'user-centric education and empowerment'.
- Recommendation engine/clause analysis.
- Attributing metadata to contracts that can be interrogated.
- Collaboration tools.
- Standardised data points - defining and recording - key obligations/deadlines/number of stakeholders.
- Standardised service obligations.

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Prioritisation

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Bringing the best ideas to life

Solution	People	Process	System	Other
Collaboration managers for each function with an agreed 'Contract Success Approach'.	Cross party contract success managers to be identified and trained. KPIs to be defined to ensure people are focused on the right success metrics.	Agreeing data points and team to be involved. Customisable roles and responsibilities matrix.	Live and dynamic dashboard. Pulse questionnaires to capture temperature of both parties. NPS of likelihood of raising dispute: on a scale of 1-10 how likely are you to... Happy/sad icons to gauge temperature.	Data points to be agreed and tracked. Who?, 12 key business success factors, project initiation document, key stakeholders, responsibilities, risk appetite, contract objective.
User-centric education and empowerment.	Enhancing knowledge of all stakeholders involved. Gaining consumer feedback into process. Need legal design thinking specialism to apply to content generation.	Apply legal design thinking and generate content to easily communicate.	E-learning platform with visual guides, pictures, voxpops etc. to easily consume content.	Continuous improvement loop.
Standardised service obligations.	Agree standard service obligations across the industry.	Industry associations adopting common legal standards.	Standardised SLO terms. Identify common data points. Create an open source database and dashboard.	Imitate telco/banking/construction industries in terms of standardisation.

Scenario 5

1 Use the problem statement sheet and the 'fishbone' diagnostic tools to identify the problem areas, desired outcomes and underlying causes.

Problem statement: No clear roles & responsibilities focussed on 'owning the process'.

Desired outcome: Making it easier to manage the contract by tracking the data.

Problem causes

Process
Lack of clarity on ownership
Lack of project management
Lack of process
Lack of understanding of need for roles
Strategy
Lack of articulated shared goals
Short term roles
System
No corporate who's who
Environmental
Unmanageable work loads
Blame culture
Organisation roles don't map to contracting roles
Lack of incentives
Unclear hierarchy

Given the great amount of debate in each group, you may see that not all of the ideas have been through prioritisation. We are not discounting any of these ideas, it's just that they didn't have time to get through them all. Maybe you could have a look and prioritise a few for yourself?

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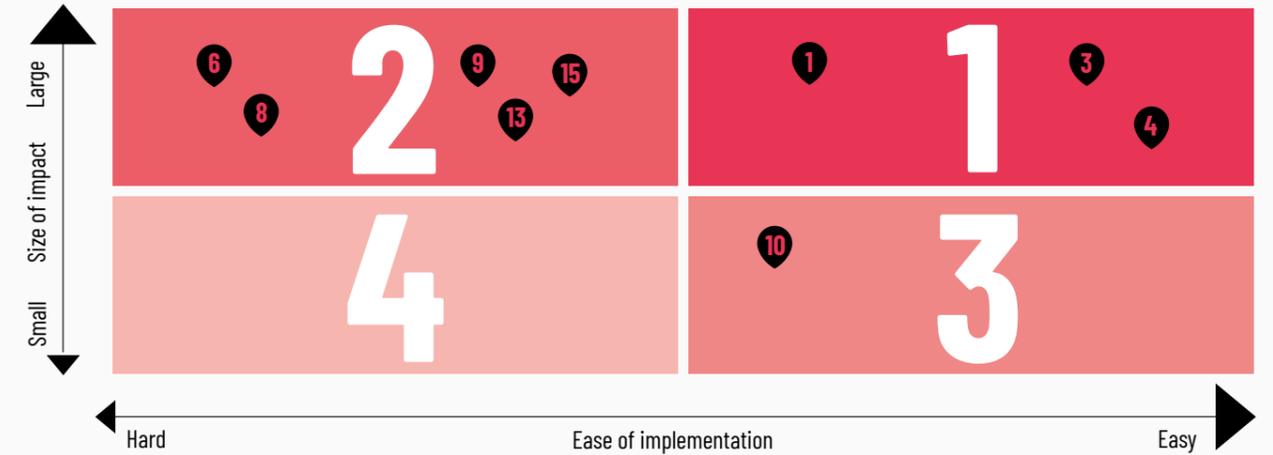
Brainstorm as many ideas from everyone in the team and create a list. At this stage no idea is a bad idea so everything should be captured.

- 1 Top down communications re importance of roles/responsibilities, create a direct link to corporate strategy.
- 2 Find ways to encourage consensus across department e.g. goal of contracting.
- 3 Appoint 'contracting champions for change'.
- 4 Tie contracting outcomes to objectives & incentives.
- 5 Introduce third party facilitation.
- 6 Establish high level process for contract process/map the contract process.
- 7 Develop a taxonomy of contract types.
- 8 Document all the contract roles and include contract roles in job specs.
- 9 Create cross-functional teams - mixed teams of procurement and legal.
- 10 Introduce continuous improvement reviews.
- 11 Spot check for success, ensure the process lives/breathes.
- 12 Create a cadre of lawyers for development as LPMs in contracting.
- 13 Implement formal "project" management.
- 14 Develop rules of thumb for contract effort estimation.
- 15 Collect historic and current cost data on contract production.
- 16 Capture and share lessons learned on every contract.
- 17 Re-use cost/billing codes to conform to process map.

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Prioritisation

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Bringing the best ideas to life

Solution	People	Process	System	Other
Appoint 'contracting champions for change'.	Identify champions (influencers) within the business at different levels, find out what resonates with them. Making sure their role is defined and to follow-up with them to keep momentum.	1. Define 2. Communicate 3. Test 4. Reinforce	Multi-channel communication.	Achieving buy-in.
Create cross-functional teams - mixed teams of procurement and legal.	Importance of cross-functional teams and having a facilitator to smooth exchanges between different roles.	1. Map contract process 2. Map process roles 3. Assess technology tools	Using a mapping tool. Document the process in a process delivery system.	Process design.
Tie contracting outcomes to objectives & incentives.	Make sure collaboration is recognised.	Incentives and recognition should be consistent, regular, earned and public.	Systems to implement this should be simple and effective.	Incentivising.

Scenario 6

1 Use the problem statement sheet and the 'fishbone' diagnostic tools to identify the problem areas, desired outcomes and underlying causes.

Problem statement: Tracking the data in contracts is too difficult making opportunities for easier.

Desired outcome: Instant access for everyone to relevant data at any time.

Problem causes

Format
Lack of incentive to make contracts clear
Data is generally unstructured
Contracts often multiple documents
Process
Lack of understanding
Lack of available data
Business rules monitoring is ad hoc
Change
No real-time updates
Regulation is complex and can change
Contracts are difficult to change
When contracts change it often creates a new document rather than a new version
Methods
Risk versus commerciality skill sets
Existing tools tend to be 'point solutions'
Standards
Data model not defined
Exceptionalism is not a default standard

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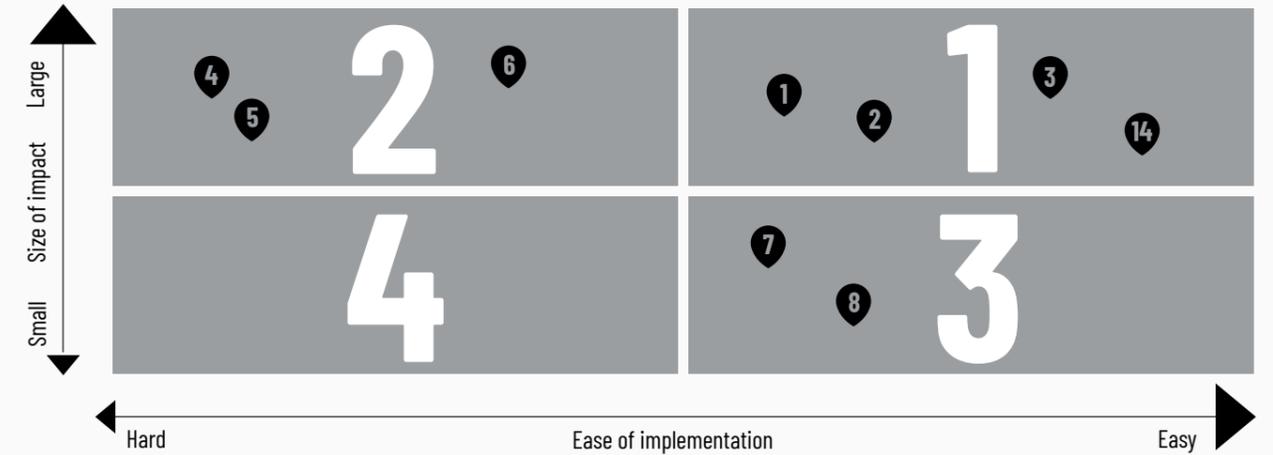
Brainstorm as many ideas from everyone in the team and create a list. At this stage no idea is a bad idea so everything should be captured.

- 1 Create the capability to set business rules.
- 2 Create a tool that removes the 80% standard/agreed clauses and focuses on the 20% contested points.
- 3 Change the dialogue - ask the other side what is important to them at the outset or ask end users what they care about most in the contract.
- 4 Create a consistent data model for contract data.
- 5 Create industry standards.
- 6 Develop an open source contracts registry and dashboard.
- 7 Company contract audits as a regulatory standard.
- 8 Agree and implement incentivised contracting models.
- 9 Utilise data room technology to hold all details/data on a contract and make it visible to all parties.
- 10 Create a technology masterclass on technology that could apply to contracts for lawyers.
- 11 Pareto portal - client select relevant points in a contract they are interested in to automate a document.
- 12 Real time collaboration to create contract party A and party B incorporating more google docs style live tracking of documents.
- 13 Live edit function and workflow.
- 14 Cut the c%@p auto tool.
- 15 Objective alignment (like dating matchmaker).
- 16 Work collaboratively on negotiation.
- 17 Make structured contracts transferable and readable.
- 18 Ability to "tag" extra data points.
- 19 Performance optimisation of contracts over time.
- 20 Have one single evolving contract.

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Prioritisation

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Bringing the best ideas to life

Solution	People	Process	System	Other
Cut the c%@p auto tool.	Trust between parties.	1) Heads of terms 2) Determine contract type 3) Issue questions on both sides 4) Re-conciliation 5) Agree on all points (go to 8) 6) Don't agree on points 7) Negotiate points 8) Auto produce contract	Decision tree to identify preferred position on closes. Gamification rating (Popularity of clauses)/ "Tinder" of clauses. Electronic heads of terms. Questionnaire sent to both parties.	Industry norms. Code of conduct for law firms willing to collaborate.
Structured Contracts transferable and readable.	Multidisciplinary teams. Culture change and teams that have non-legal skills represented.	Codification of clauses in a modular way. Build a contract from clauses library.	The database of clause types/ variables/variances. Need to work in existing tools i.e. Microsoft Word. Each clause would include text and or applicability and contact.	Trending clauses (crowdsourcing standards).
Single evolving contract.	RACI - Who/ changes?	Create a family link between documents of a similar type. Contracts - Trigger - Notification - Negotiation - Sign/record. Audit trail - Why are we changing? (Trigger for change).	Doc editorial system (i.e. Google docs). Solution to identify group contracts using tech. Workflow and sign off system.	Imitate telco/banking/ construction industries in terms of standardisation.

Final thoughts

*A quick summary
and a final request*

The original hope for the Legal Design Challenge was that it could showcase the benefit of collaboration and design when trying to solve business challenges, as well as the value of sharing the outputs on an open source basis to encourage others.

Final request

The Legal Design Challenge should be seen as a starting point and not much will change if it ends up just being a one off event or a theoretical exercise. The aim was to make it easier for people to use design principles and tools and to enable them to either build on the outputs or tackle similar challenges. The more people that get involved, the more value can be created. With that in mind our final request is that you take what you can from the work that came out of the challenge, keep the conversation going and most importantly, keep collaborating.

PS - A date for the diary

If you found the outputs from the Legal Design Challenge useful or interesting then watch out for the next Legal Design Geek event on 17 October. It will be a chance to learn more about useful design principles and tools and showcase new challenges and opportunities to collaborate.



*“Take what you can from the work
that came out on the challenge,
keep the conversation going and
most importantly
keep collaborating...”*



THE NEXT LEGAL DESIGN GEEK
CONFERENCE IS
17TH OCTOBER
IN CENTRAL LONDON
www.legalgeek.co

LEGAL
design
GEEK



*“The aim was to make it easier
for people to use design
principles and tools...”*



Thank you!

*A very big thank you to everyone
that attended on the day:*

Mo Zain Ajaz, LEx Open Source
Chris Bell, Axiom
Gareth Brewerton, Munnely
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