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Briefing

SMARTER LEGAL BUSINESS MANAGEMENT

ROLE WITH IT

Katherine Hallam at Capsticks on the business case for a new career path

IN THE PILOT SEAT

Derek Cummings at Burness Paull on managing to make agile work

E-SIGN UP

Why Bird & Bird is leading the way in e-signatures



Socially capitalise

From greener buildings to improving education, law firms talk about how feeling good about giving back also benefits the business



INDUSTRY CASE STUDY

E-sign of the times

Mark Mountford, head of business solutions at Bird & Bird, says the firm is gradually building up buy-in for the e-signature experience, with significant input from Blue Car Technologies

In July 2016, the Law Society released a practice note to provide some more legal certainty for firms looking to embrace the arrival of the e-signature. Not long after that, Mark Mountford, head of business solutions at Bird & Bird, signed a contract with DocuSign and Blue Car Technologies to pilot the technology.

“It’s interesting that it’s clients who are really driving us in this direction,” he says. “They feel we should be able to use fewer envelopes and couriers and manage transactions more electronically.”

The time-saving element is obvious – but it also runs up against the age-old problem of some

resistance to change, no matter the efficiencies. “Whether it’s technical or behavioural, getting traction on change can be a hurdle,” admits Mountford. “Some people prefer to do things the traditional way. That may be because of a lack of confidence with new ways of working in general, but it can also be the case that they’re so embedded with, say, client work, they need time to understand the technology in more detail. There may also be some legal gaps or requirements that need lawyer interpretation before some transactional usage.”

Signing up business services

To help lawyers grow more accustomed to the

technology, Bird & Bird came up with a couple of solutions. First, one of the firm's leading London-based IP lawyers put together an internal operational manual on the topic, clearly outlining the viable options available to the different practice groups in different jurisdictions. "In addition, we've handpicked some individual lawyers to promote the benefits around the business," says Mountford. This has already led to good penetration, in the Nordic region in particular, as well as an extended pilot for aspects of M&A work in the London corporate team.

However, e-signing has proved most helpful in business services. An international working group within the businesses services team was drawn together – and the IT department is now using it to exchange non-disclosure agreements, contracts, and other agreements with external IT suppliers. "Importantly," says Mountford, "a new internal process for supplier invoice approval has also been implemented, which saves time and effort in what was previously a manual process.

"Instead of a back-and-forwards cycle for invoice approval, a PA can now scan in an invoice for the budget holder to e-sign off straight away," says Mountford. "It saves time not only for the accounts team, but also for the PA and the budget-holder. It also means you have a digital audit trail, which can help if you have a query with a supplier."

The firm's also trialling e-signatures for the thousands of documents a year generated through HR processes – including contracts for new joiners, terms and conditions, maternity arrangements, and paperwork around lateral hires and leavers. "If a recipient needs to sign a document they can e-sign, which allows them to keep a copy if they wish, and several documents can also be bundled together," says Mountford. "It would be difficult to say it all makes us a certain percentage more efficient, but it's clearly a lot more convenient for all concerned."

Integrate service

As e-signatures become more widespread, the next challenge was to integrate the technology with the document management system – which is why Mountford turned to Blue Car Technologies.

"A key point that came out of our review with the lawyers was concern about having a 'receipt' for a transaction – time stamps and unique identifiers that prove what has taken place," he says. "Thanks to the Blue Car product, signed versions of documents are automatically stored in

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the document management system, together with an electronic receipt that lists IP addresses and other key details. If anything needs to be checked by any party further down the line, you can always return to the electronic receipt.

"The other thing I really liked about the product is that all actions required by lawyers take place within the DMS, where documents and correspondence for a matter have their own workspace. Using the DocuSign interface you can upload everything for all parties to the DocuSign cloud portal, tagging whoever needs to sign what, all in one transaction. At the time, Blue Car was the only supplier available that covered the complete document e-signing lifecycle.

"I was also impressed with Blue Car's willingness to collaborate on determining future integration improvements for our firm. For example, our lawyers have expressed interest in gathering additional audit information. The firm is also currently trialling a version with some architectural changes to help teams work more effectively by avoiding potential compatibility problems with Microsoft Outlook.

Next on his own agenda is collecting feedback from the firm's international offices, especially across the Asia Pacific region. "E-signatures have coincided with the rise of business services and IT experts to the status of professional consultants – internally as well as with clients," he says. Mountford will be on a trip to the Hong Kong and China offices in autumn 2017 – and then in Australia and Singapore in early 2018 – to discuss the advantages of e-signing, alongside other ways the firm is innovating.

"I'll run roadshow demonstrations and Q&A sessions across all our international offices to showcase and discuss how efficient and convenient e-signatures can be, and how it can help our lawyers to win prospective clients and collaborate better with existing ones. I'm hoping this will help to create more awareness of the benefits of e-signatures and drive engagement with the Blue Car product across the firm."

Elsewhere, pilot versions of the technology are being used in certain practices so employees and clients can trial it. The main aim in both cases is to help people to recognise how e-signatures can efficiently meet the demands of a clearly digital-first future. ▀