

Tackling the 'more for less' challenge at Wesfarmers

The Challenge

'More for less' is not new to in-house legal teams, or any professional service discipline, describing the challenge of how teams aim to deliver more and better services to the business at a lower cost per unit.

Such a challenge has not escaped Wesfarmers' General Manager - Legal, Sheldon Renkema, who described at the 2018 Legal Technology and Innovation Conference in Sydney, that he has observed 'an ever-increasing demand for our services as our businesses grow and the sophistication of our internal clients increases. Countered by that is pressure on costs due to the legal team being a corporate overhead, creating the "more for less" problem'.

Of course, there are many ways to address this challenge. Technology automation plays a role, but without integrating legal processes with the rest of the business and gaining stakeholder adoption for any solution, projects often lose traction and fail to deliver the intended benefits.

The solution to this challenge also had to fit with the two linked strategic imperatives of the Wesfarmers Corporate Solicitors Office (CSO):

- To be true business partners by working as an integral member of its business teams in working to create returns for shareholders; and
- To find ways of reducing the volume of low complexity and low strategic significance work that the legal team is engaged in.

As a first step towards achieving these objectives, Wesfarmers focused on the automation of the high volume of Non-Disclosure Agreements (NDA) that the company creates.

The Partner

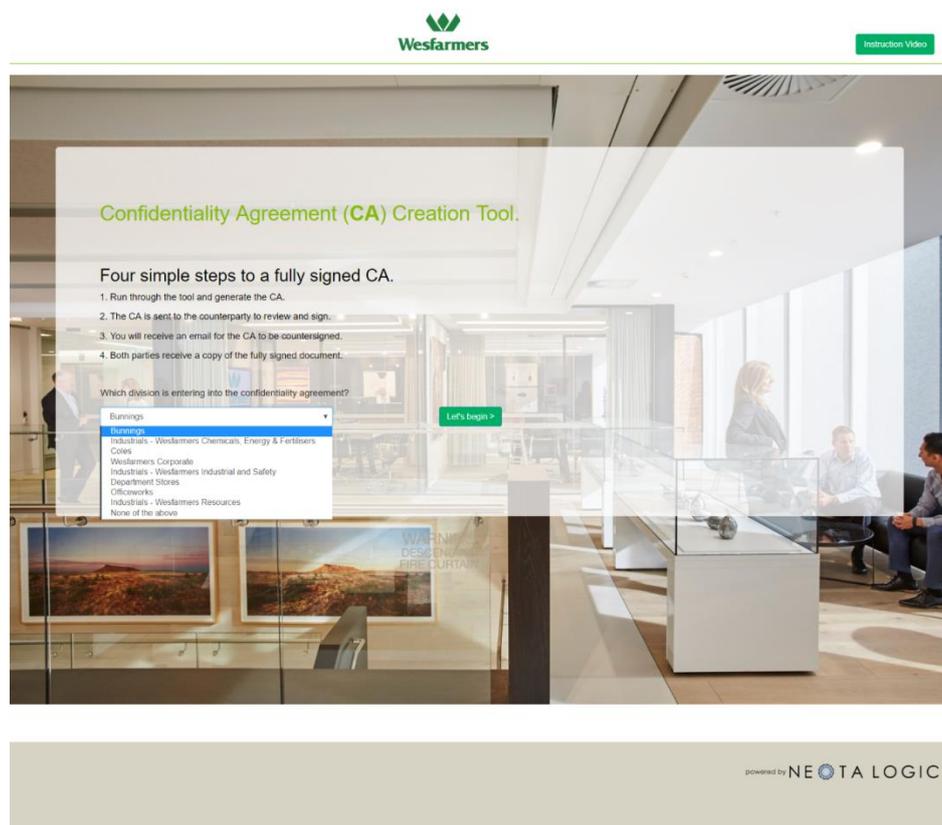
Wesfarmers approached a number of software providers for their NDA automation solution, judging them on several factors, including:

- Depth of offering including the ability to handle complex business rules, processes and document templates in a single platform;
- Ease of use of the end business applications; and
- Professional services support for the reengineering project.

Neota Logic was selected as the preferred partner based on their unique competencies in the following areas, all combined into a single platform with accompanying professional services:

- **Comprehensive process automation** – Previously, there was no way to automate the quantity, complexity or timeframe that NDAs were initiated and completed by the CSO. Neota Logic's workflow capability allowed for this, controlled via a purpose-built management dashboard.
- **Automation of complex legal rules** – Neota Logic's rules automation engine allowed a solution to be built whereby the correct NDA template would be automatically selected based on data inputs by the business user being compared against parameters set by the CSO. The solution therefore not only prevents the user from using the self-serve tool in specific scenarios that fall outside the risk parameters of the organisation, referring the user to a lawyer for assistance, but also adapts the form of the NDA to suit the specific requirements of each particular scenario.
- **Embedded Document Automation** – Neota Logic's platform enabled Wesfarmers' to use their existing NDA format, retaining existing styles and look and feel and removing the need to re-create the documents in a separate platform.
- **Business and technology re-engineering expertise** - Neota Logic was able to customise the "out of the box" platform solution to the client's unique business circumstances to drive adoption and success.
- **Unlimited user model** – Neota Logic permits unlimited users to use both our platform and the NDA solution, allowing a link to the application to be posted on Wesfarmers' intranet page. This was determined to be the most cost-effective licensing solution for Wesfarmers.

The Solution



To facilitate a successful self-service tool, Wesfarmers determined that it needed to re-think the content of its NDAs to ensure that they strike a balance of protecting its confidential information at the same time as being even-handed for the counterparty. The CSO team also worked to minimise the number of templates and reduced its NDA suite to four standard documents:

- Short form one way (to protect Wesfarmers' confidential information in lower-risk situations);
- Short form two way (to protect both parties' confidential information in lower-risk situations);
- Long form two way (to protect both parties' confidential information in higher-risk situations); and
- Divestment (for a divestment of assets or a business undertaking).

Wesfarmers, with the Neota team, then defined:

- The initial threshold questions required to identify which template to use;
- The legal rules and user interface requirements to ensure the self-serve NDA application would be appropriate for use by business users and fit its risk profile parameters;

- Negotiation, escalation and handoff requirements; and
- Electronic signature and filing processes.



Instruction Video

Signatory details

- Who will sign the agreement on behalf of Wesfarmers?
- Two directors or a director and company secretary
 - An individual as attorney for the company
 - An individual as authorised person for the company

⚠ Legal advice should be sought to ensure that a power of attorney is in place and the execution is within the authority of the attorney.

Wesfarmers Signatory One

Full Name

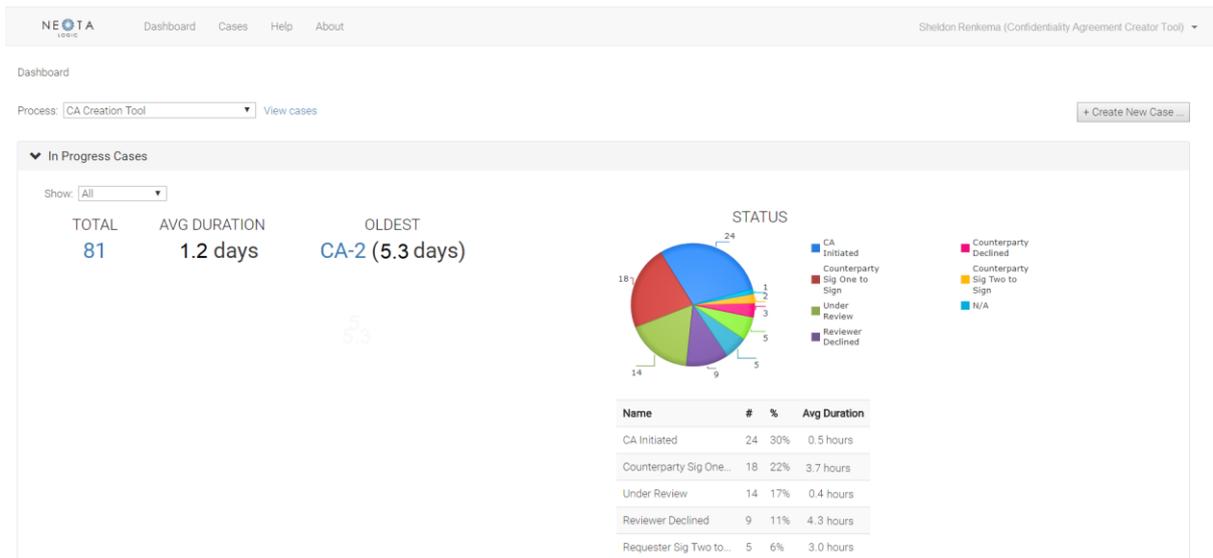
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All these were then incorporated into Neota Logic's platform, along with an ABN lookup integration to search for the full entity name and ABN of the counterparty (where it is an Australian business).

The solution was integrated with Neota's Workflow and Analytics Dashboard, allowing Wesfarmers' lawyers a single console from which to view the status of every NDA associated with their businesses. The dashboard not only tracks at what stage of the process a particular NDA is up to, but also provides insight into each individual agreement. This achieved Wesfarmers' goal of attaining visibility of both the number and timeframe of NDAs completed for the CSO, which will help to prove the value of the system on an ongoing basis.



Business Adoption

Sheldon commented that early business users of the application 'were surprised at how easy and intuitive the application is to use' and highlighted the efficiencies it has created 'by allowing for a much quicker turnaround.'

It has had the further advantage for the CSO of demonstrating within the enterprise a willingness to take a leadership role in embracing technology to improve efficiency.

Wesfarmers is in the process of rolling out the NDA solution throughout its business divisions.

About Neota Logic

Neota Logic is the provider of Neota Logic System, intelligent automation software for professional services. Please contact Jackson Liu (jliu@neotalogic.com) for a demonstration of the Neota Logic platform and our NDA solution or to discuss how your team can apply the Neota Logic platform to automate Professional services in your business.