
# Autocene Use Case Series

## Fortune 125 Biotechnology Product Development Company – Legal Document Automation

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# Legal Document Automation

## PROBLEM STATEMENT

This **Autocene** customer is a large Fortune 125, Massachusetts based American biotechnology product development company, with over 70,000 employees located in over 400 offices around the world.

Common tasks for the sales staff include the creation and execution of a large quantity/wide range of legal agreements, that are executed between multiple business units of the company and customers/prospective customers every day. Given the quantity and complexity of these agreements, combined with the manual processes for agreement preparation, the company needed a method of automating the creation and approval of these documents.

A common theme for **Autocene** customers, especially for large corporate and government organizations is the fact that existing staff have far too many applications just to perform their basic duties on a daily basis. For this **Autocene** customer, the introduction of yet another application was not desirable.

## VARIABILITY OF LEGAL AGREEMENTS

Sales staff must enter into a variety of legal agreements within multiple external parties, in a wide range of circumstances. For existing end customers, it is common that several agreements must be executed based on the company's new product offerings: purchase agreements, software license/subscription agreements, professional services agreements, support & maintenance agreements, etc. On another end, the company makes use of a global distributor network which presents another large set of Distributor and Channel Partner Agreements. Further, the company has many Business Units which operate as separate companies within the parent organization, each of which has separate agreements or unit-specific language contained within the base agreements. In addition, the sales staff must to enter into Confidentiality Agreements with both current customers and prospective customers, that have wide variability to cover multiple circumstances related to either party or both parties acting as the disclosure of the confidential information.

## PREVIOUS PROCESS

Sales or Sales Management staff would compose and send an unstructured email to their contacts within the legal department. Internally within the legal department, different levels of legal staff would focus on different agreement types based on the complexity, business unit, location/country, etc. Next, a staff member in legal would receive an email from a sales/sales management staff member who would then forward the message to the correct legal staff member manually. The correct legal staff member would read the unstructured email and in nearly all cases would need to send email back and forth to the sales staff in order to obtain all of the information required to create a **Legal Agreement**.

During this entire process, no data or metadata is recorded in any structured way. Once the final legal agreement was created, the legal department would email the agreement, ready for execution back to the sales staff, who would then deliver it to the customer – a lengthy process from start to finish.

## THE FORMVERSE PROCESS – A UNIQUE APPROACH TO A COMMON PROBLEM

Now, authorized sales and sales management staff can execute the Legal Agreement process from start to finish in an automated manner.

1. Authorized Sales and Management staff open a normal email within their current **Microsoft Outlook** email system or open their **Autocene WebApp**.
2. They select the, **New Agreement Preparation Automation Application**, an **Autocene** Application or "Workcene". (from within Outlook or WebApp)
3. The sales staff inputs needed information into the Workcene interface, which includes:
   a. The Agreement Type (Non-Disclosure Agreement, Distribution Agreement, Reseller Agreement, Purchase Agreement, etc.).
   b. The Subtype (i.e.: for NDA – Customer is Disclosure/Company is Discloser/Mutual or Distribution Agreement is exclusive or non-exclusive, etc.)
4. Staff then select the Business Unit.
5. They enter the Customer's legal entity name and address.
6. Then, staff can select (via drop down lists and checkboxes) the correct agreement template, enter/hide/remove sections from the agreement and have the ability to add other variable agreement data.
7. The sales staff either clicks **Send** (for Outlook based interface) or **Submit** for the **Autocene WebApp**
   a. All data, metadata, and attachments are automatically stored in the **Autocene** database.
8. When the correct legal department staff member receives the email, they can confirm the data entered by the sales staff and then select **Prepare Agreement**.

**Autocene** takes all of the data entered by the sales staff, selects the correct **Agreement** application template, and creates the agreement in **MS Word** format, that has already been set to "Microsoft Word Protected View", which permits the customer to only make redline changes to the Agreement and then emails the completed Agreement to the legal department and/or the sales staff and/or the customer.

The Agreement can also be **integrated** in DocuSign or any other **eSignature solution** and sent to customers for electronic signature. In addition, most of the global sales staff traveling onsite to customer locations, or internal/external users, can access the Agreement directly via Microsoft Outlook email, or **Autocene WebApp**.

If certain documents or agreements need variable levels of approvals, **Autocene** can provide automated routing for both simple or complex workstreams.

## REPORTING & AUDIT

Each time data is entered into an **Autocene Workcene** (Application), all data, metadata, and attachments are automatically stored within the database. That information can then be accessed through custom real-time reporting by authorized users, or automatically integrated into ANY other existing enterprise applications.

Data made available within reports is fully customizable and could include any or all data/metadata captured during the application's flow. With **Autocene**, users can view reports which can then be sorted, grouped, and filtered by any field within the application. This allows staff to interpret data in multiple ways.

## CUSTOMIZED FEATURE SET

This Use Case is just one Code-Free Application or Workcene that can be implemented using **Autocene**. Since **Workcenes** can be created with a flexible architecture, a similar process can be easily customized for each customer requested variation. A key benefit enjoyed by customers is that this powerful additional functionality is made available to customer's users without having to introduce any additional "point" solutions. This approach results in high adoption, low cost, and enterprise grade functionality.

## Discover Autocene

**Autocene** Enterprise Automation Platform give customers the flexibility of a Code-Free Application Development Platform, combined with the power of an Intelligent Process Automation solution. It gives enterprises the ability to rapidly deploy fully configurable **Autocene "Workcenes"** that are capable of automating even the most complicated business processes.

**Autocene Workcenes** improve productivity by automating both high value, mission critical processes and eliminating time consuming repetitive tasks. **Autocene** makes both Attended, Semi-Attended & Unattended automations easy, freeing end users and adding value to your organization's critical processes & bottom line. All with no developers needed!

**Autocene Passport** bidirectionally integrates data with any of your existing Enterprise applications & databases (On-Premise or Cloud Hosted). Data can seamlessly travel to and from multiple disparate systems and/or **Autocene Workcenes**, monitoring databases and automating integrations, centralizing data for end users & eliminating time-consuming manual data entry.

 