

Dealing with issues tied to?

- ◇ I can't see it
- ◇ I can't find it
- ◇ I can't control it
- ◇ I can't track it

The real driving force for process optimization is efficiency. As legal contracts manager, you are always being asked to shorten cycle times – in short, to be more efficient. The reason, of course, is that Efficiency will always improve your company's bottom line.

What is BPM [Business Process Management]?

Let's define a process as a collection of related, structured activities [a chain of events] that produce a service or product. These are the kinds of processes that tend to get management's attention. They are performed daily and their costs are not insignificant. [A product can be a manufactured item, an insurance policy, software, a home mortgage, medicine, etc.]

Let's identify another process - the process to define, measure and improve your processes – we call it a 'process optimization process'. This process should get more attention than it does, because this is where you uncover improvement opportunities.

Business Processes exist on 2 levels – the people and the technology. In casual conversations, you will discover that there are 2 camps in the BPM world. There are those who focus first on the people and there are those who focus first on the technology.

On the 'people' level

Some pundits see BPM as a philosophy. Management could be saying to underlings that they want their business processes managed more effectively.

A Business Line Manager could be managing his own business processes. They could define their process, they could measure it [see how long the process takes], they could look for trouble spots and they could make improvements to the process. They could have their own optimization initiative.

Either of these strategies could be manual and they are considered BPM, even if they do not utilize technology. In the manual environment, you have a documented process that people follow and when you make changes to that process, you distribute a new documented process for them to follow.

On the 'technology' level

Some pundits see BPM Software as Business Process Management. They skip over the people level and go right to the technology.

Other technologists only see that information must move between enterprise software packages. They think of SOA and BPM as synonyms.

While still others believe that modeling is needed to create that 'perfect' process. Therefore, modeling is BPM.

BPM Primer

You would be mistaken if you chose to leave any of these 'angles' out of the definition of Business Process Management. Business Process Management includes all of the activities required to manage business processes.

Companies that have implemented BPM successfully will start with their 'people', because it is your company's 'people' that define your business processes and your business processes drive your technology choices.

Legal Contract Processes & Issues

Companies have a wide range of business processes that span from complex [like engineering change requests] to simple [like vacation requests]. For many of them, change requests take too long to turn around and they are expensive to manage. Simple processes, like vacation requests, can get waylaid or the request can be lost all together.

Let's focus on some processes for Legal Contracts:

Sales Contracts

Many companies have a Sales Contract to go along with an order. The sales contract stipulates your company's responsibility related to this order. This documentation goes through a life of creation, change and management just like engineering design documentation. How do you know that the latest released contract is the one that got signed by the customer? If you are the one waiting for the contract to exit from legal, do you know who is working on it? Do you know when it will be done? Can you speed up the process?

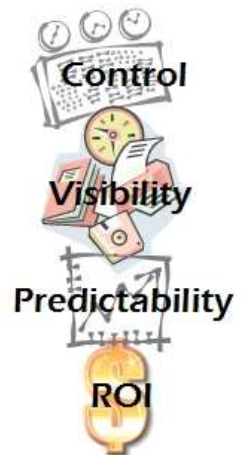
NDA [non-disclosure agreements]

Often, you and your customer will need to sign non-disclosure agreements to discuss the details of a sale. Where do you find an approved NDA agreement? How do you know that it has been approved? Once it is signed, have you stored it in the proper location? If you want to retrieve the signed NDA, where will you find it? These problems exist more often than not.

Mergers and Acquisitions

Here is an example of a process that needs limited visibility - only those involved in the merger/acquisition should have visibility. This process is likely to be more complex. You probably need an NDA, some kind of sales contract and maybe several others. Unless you do mergers and acquisitions all the time, this process could be very ad hoc. How do you deal with the security and the flexibility needed to manage this process?

**Ingenuus
Active Packet
Technology
Provides:**



 **ingenuus™**

6136 Frisco Square Blvd
Suite 400
Frisco, TX 75034
Tel: 469-252-1144

BPM Primer

Other Documentation

Your documentation is your company's intellectual property [mission critical]. People in your company have an expectation that when they check out a document, that it is the latest released version. Many companies will have a horror story about someone using the wrong documentation. A shared drive does not solve the problem – it cannot manage versions, nor does it do a terrific job of managing access.

Ingenuus Manages Processes

The Legal Contract Manager

Our objective is to put the power of Business Process Management into the hands of the Business Line Manager – the process owner. They are responsible for their processes and they are the ones that will be rewarded for their process improvement successes.

Ingenuus is designed to be configured [by Business Line Managers] not coded [by IT professionals]. At the same time that the Business Line Manager is configuring the software to follow their process, they will be configuring the user interface to show only those fields that are needed in the process.

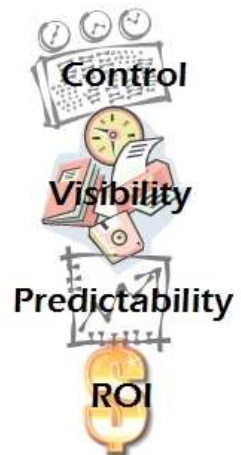
Ingenuus allows the Business Line Manager to dictate who will perform an activity, what activity they will perform, how long that activity should take, what information is to be created, who will perform the next activity based on simple [if, then, else] logic, etc. And, it provides the Business Line Manager with visibility into the process to make sure that it is on schedule. They will always know who has performed what activity and who is working on it now.

Sales Contracts

In this case, the Business Line Manager could be your chief legal counsel or the VP of Sales. They know all of the activities required to approve a Sales Contract. They know who needs to approve it. They know what risks their company is willing to take.

Today, this process is very likely manual. Moving from manual methods to electronic methods usually result in: The use of the right contracts for the right sales opportunity; The comfort of knowing that you might be able to defend the contract in court; Being able to collect the agreed upon revenues; The ability to track the creation or changes to the sales contract; Sales being able to check the status of a contract without bothering the Business Line Manager; etc.

**Ingenuus
Active Packet
Technology
Provides:**



 **ngēnuus™**

6136 Frisco Square Blvd
Suite 400
Frisco, TX 75034
Tel: 469-252-1144

BPM Primer

Ingenuus Software

The Ingenuus Process Orchestration Software can easily manage very complex processes like engineering change control as well as simple processes like purchase requests. It provides the Business Line Manager with the ability to Orchestrate their business processes by linking processes together where they actually intersect.

Ingenuus works with our customers to create a process optimization process utilizing our process optimization pyramid framework. This includes the necessary metrics [reports] needed to see if improvements are actually being made.

Ingenuus provides the tools necessary to automate steps locally [within our software] and to automate steps globally [integrations to other enterprise software].

Ingenuus combines Forms management, document management, task management and project management into one piece of software that provides visibility and control of your company's business processes.

All this Efficiency at a relatively low cost of entry.

Benefits

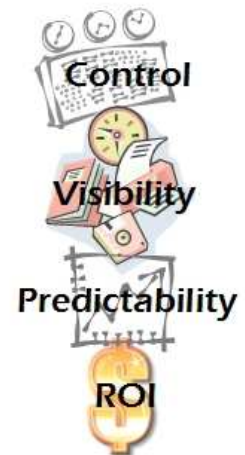
What's in it for your Company?

Efficiency...

- ◇ Visibility into your processes means you will be able to see [in advance] if an activity will not be completed on time.
- ◇ Visibility into your process means you will always know who is working on what activity at that moment in time.
- ◇ The ability to assign time spans to an activity means you should be able to shorten process cycle times.
- ◇ Shorter cycle times means more activities are completed in a shorter amount of time. Automating some of these activities means even shorter cycle times.
- ◇ Automation of activities where possible, means individuals can do more work in less time
- ◇ Getting your product or service to market sooner means: larger market share; ability to take advantage of early pricing; creation of a more difficult barrier to entry; etc.

And, Efficiency will always improve your company's bottom line.

**Ingenuus
Active Packet
Technology
Provides:**



 **ingenuus™**

6136 Frisco Square Blvd
Suite 400
Frisco, TX 75034
Tel: 469-252-1144