

SALES AND LEGAL AREAS: A KEY ALLIANCE FOR BUSINESS DEVELOPMENT



Bidle Legal

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Introduction

The Legal and Sales areas are two fundamental pillars of business strategy. Although each has its own interests and objectives, to the point of seeming worlds apart, the current reality leads them to work hand in hand, in an alliance that goes beyond the goals of each area.

If you work in Sales or Legal, chances are the end-of-quarter crisis is likely to be a familiar scenario for you. It's a mad rush to close deals, meet quotas and increase the company's revenue. Unfortunately, the hustle and bustle of the end of the quarter can unnecessarily strain the relationship between Legal and Commercial. **In the worst case, both departments work in silos and see each other as obstacles.**

Slow contract closure and slow communication can lead to a lack of clarity and frustration. The scenario is a chaotic sprint but deals are struck, at the cost of much sweat and tears.

At this point you may be wondering, but **how can I create an effective and transparent synergy between Legal and Sales?**

Over the next few pages, you will find practical examples and useful tips, plus the experience of Matthew Luzaich, Head of Sales at Bigle Legal. From his experience working side-by-side with the legal area, we will reveal with which tools and knowledge the legal and sales teams can generate an acceleration of the work without the quarterly closing generating pressure, silos and even conflict. Join us on this journey and get ready to boost your firm's full potential in the market!

"We use Bigle Legal to streamline our commercial proposals, and to reduce contract validation time, ensuring that standard clauses are up to date, guaranteeing quality, speed and increased results for the commercial area"



Matthew Luzaich
Head of Sales, Bigle Legal



1. Why Sales and Legal must walk together

1.1. THE IMPORTANCE OF COMBINING EFFORTS. ANALYSIS OF JOINT OBJECTIVES AND RESOURCES

When the collaboration between Legal and Commercial is mentioned, old headaches often come to mind. Commercial does not comply with what is established by Legal, and does not follow the indications given to them. Legal does not respond to emails for days and so it is not possible to move forward with this or that business deal. However, **reality shows both areas a path that they must walk together**. The most solid results are achieved together and when talking about company objectives, it is necessary that both areas can build bridges, and weave synergies to be able to fight together for the same goals.

In short: **strategy**. If Legal and Commercial fit together like the oiled parts of an engine, it will only be good news for the business. But this requires prior self-analysis.

First,

it is necessary to analyse the internal processes of each department, as well as points of commonality, collaboration and friction between the two areas.

Secondly,

the resources available to each of them must be evaluated: **human resources, technological resources, budget distribution, etc.** available to each of these departments and which must be put on the table in order to draw up a joint strategy.



1.2. COMPLIANCE

Compliance is a fundamental concern and should not only be a concern for Legal. Regulations and laws vary, the economic climate changes and this forces companies to keep their clauses and documentation up to date, as they have a significant impact on business operations. The Commercial area, which is dedicated to closing deals with new clients and expanding the business nationally and internationally, must bear in mind that all operations must comply not only with the company's internal regulations but also with the specific legislation of each country.

Working closely with the commercial team, the Legal department provides the Sales team with the guidance it needs to ensure that business practices comply with all applicable regulations. **Aligning in this way reduces the risk of breaches and protects the company's reputation against all types of non-compliance penalties.**

1.3. SHIELDING COMPANY OPERATIONS

The race to the finish line in the commercial area is hectic when it comes to the end of **the quarter**: the rush to close deals, meet quotas and generate revenue. This creates a chaotic sprint involving Commercial and Legal, which translates into pressure between the two departments and can put the company's operations at risk.

Imagine the case of a sales manager of a financial services company who is in negotiations with a potential customer to close a major contract. The sales team wants to close the sale at all costs, but first, they must ensure that clauses are included that protect the company's interests and minimise any risk. This is where the partnership with the legal team becomes more important than ever: **together, the two areas have to verify compliance and address any legal issues that may arise during negotiations and in the shortest possible time.**

Thanks to this collaboration, the Sales area can address the client's concerns and objections with confidence, presenting a solid and well-structured contract that provides total security and transparency, while protecting the company's interests. This creates a win-win situation that strengthens the company's image, builds customer confidence and increases the chances of a successful sale.



2. Boosting sales through automation of commercial contracts

2.1. BALANCE BETWEEN SPEED AND COMPLIANCE

Clients are one of the most valuable resources of any company. Deadlines set a frenetic pace and **in Sales, the weight of numbers is overwhelming**, because customer closings should have been done yesterday. In these urgent situations, processes are accelerated, compressed and even overlooked – something that cannot happen in the case of compliance.

Finding the balance between the speed of business operations and compliance is crucial because it avoids blunders that can cost the company dearly. **Legal always has to have detailed oversight over contracts, but without technology to assist it, it does not have the time to review them all and to provide value on each one. To make up for this lack of time and to achieve that longed-for balance, the automation of commercial contracts offers the perfect solution.**

But how to achieve the balance between speed and compliance?

An excellent way to achieve effective collaboration between sales and legal and strike the desired balance between speed and compliance is Contract Lifecycle Management (CLM). This type of software provides a platform that automates, streamlines and secures the entire process involved in working with documents. Specifically, it allows companies to generate documentation in an automated way, share it and control its entire lifecycle from start to finish.

A CLM platform is not an exclusive software for the Legal area and neither is it for Sales. This solution is multidisciplinary and transversal, allowing both departments to extract benefits and advantages from its use. For the Legal area, it means **having the certainty that the documentation generated is correct, faultless and ensuring full compliance** and for the Sales area it means **closing deals faster, while maintaining 100% legal integrity of the contracts**.

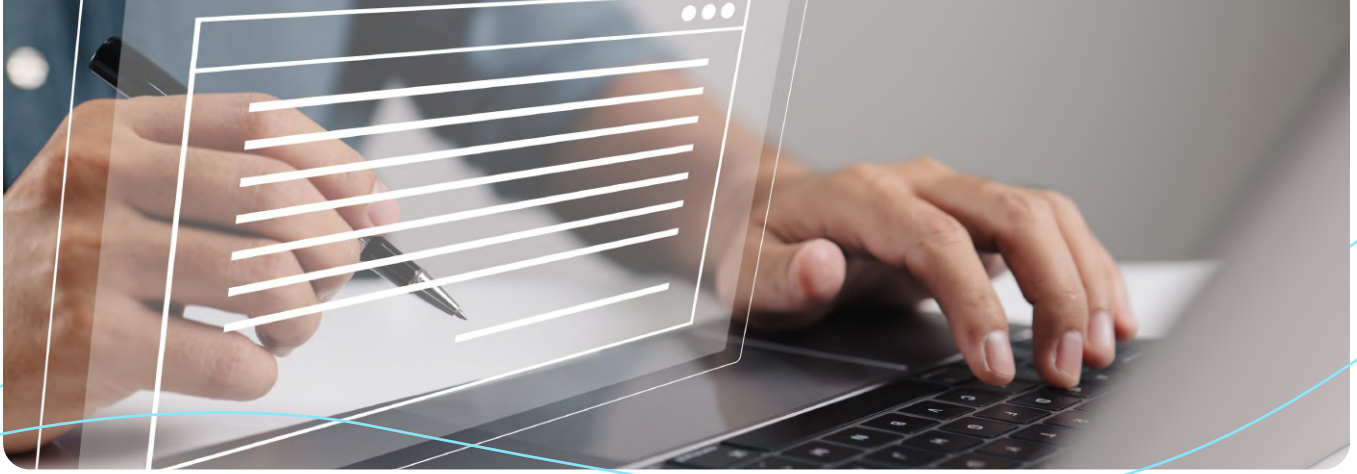
Let's take a look at some of the benefits that both areas get from using a CLM for their legal document and contract management:

- ✓ Increased security
- ✓ Increased compliance
- ✓ Improving operational efficiency
- ✓ Improving interdepartmental collaboration
- ✓ Accelerating the closing of business deals

Practical advice for maximising collaboration

Speaking in familiar terms, Let's be honest, sometimes it can feel like you need Google Translate to understand a contract, especially if you're not a lawyer. **It's impossible for Sales to understand every nuance of contract language independently**; And so is the fact that Legal, without the help of technology, can solve its tasks at the speed at which Sales intends to close deals.

In the case of Legal, their job is to educate colleagues on seemingly minor differences in legal terminology. Don't be afraid to step forward and proactively share experiences, particularly around key contract terms and their respective commercial implications.



2.2. SALES DOCUMENTS THAT CAN BE AUTOMATED

Document automation assists the commercial departments in this alliance with the legal area: by **automating the company's legal document templates**, the commercial area completely transforms the process of preparing legal documents. Any sales employee can obtain their contracts by filling a dynamic form; **in a matter of minutes, they obtain their contract without errors and even personalised with the branding of the prospect's brand.**

Which contracts can be automated within the Sales area?

Any legal document can be automated, regardless of its length or complexity. There are various commercial documents that can be automated to improve efficiency and productivity, for example:

✓ Confidentiality agreements

✓ Service proposals

✓ Distribution or agency agreements

✓ Partnership agreements

✓ Collaboration agreements

✓ Purchase orders

✓ RFP response documents

✓ Processing contracts

✓ KYC

These documents often follow standardisable patterns and structures, making them ideal candidates for automation. However, a state-of-the-art document automation solution is capable of automating the most complex document templates. In this way, **the sales team can quickly generate customised contracts, adapted to the needs of each client**, without wasting time on repetitive and tedious tasks and without having to wait for Legal's approval, because they will already have it in advance. So **you can generate contracts 24/7 without the need to ask for Legal's approval** and, the latter in turn, will do so with the peace of mind of knowing that the document will, of course, comply with your standards.

2.3. ACCELERATE YOUR COMMERCIAL PROCESS AND BOOST THE SALES – LEGAL ALLIANCE

Document automation benefits the legal team and frees them from the task of creating and reviewing bespoke contracts every time a commercial opportunity arises, but it also allows the commercial area to be more independent and decisive, speeding up the entire sales process. In addition to creation, there are other phases of the document lifecycle that can be automated by comprehensive CLM software, covering all stages of the process.



Validation module

Validating a legal document internally should not be a challenge, but it is often complicated. Technology makes this task much easier for sales staff. With Legal's approval, the Commercial department passes the document to the relevant supervisors for final approval. At this stage of the process, the CLM centralises the validation and makes it possible to have the proposed changes on the same platform, unifying suggestions from the teams or individuals required in each case. In Commercial, they can send the document to be validated from the CLM platform, receive notes from their supervisors, comments, and suggestions for changes to leave the document impeccable, avoiding costly validation processes.

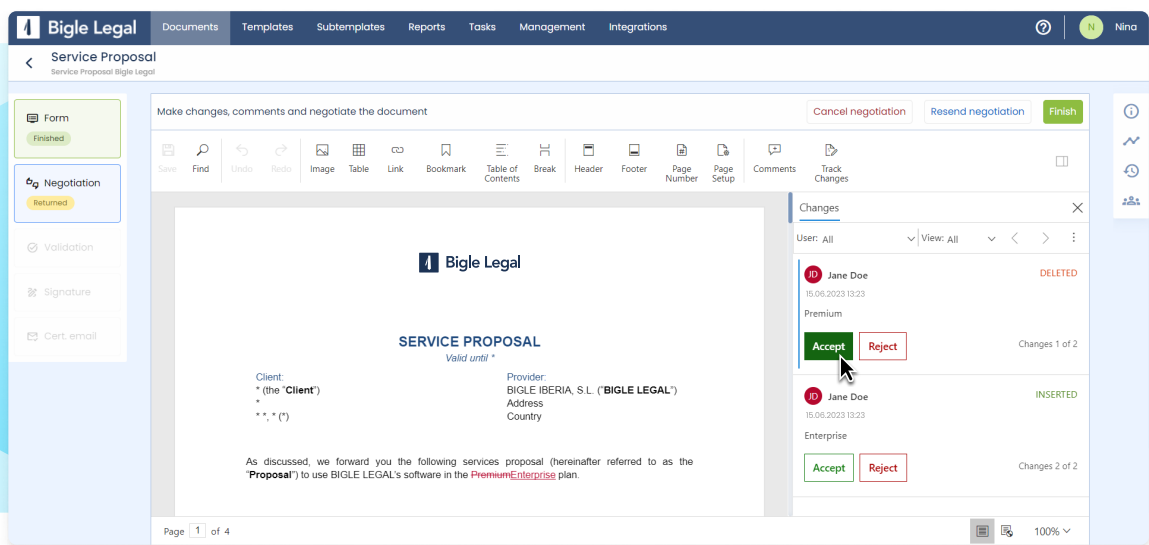
Contract negotiation

Very rarely is a legal document signed at first glance. Usually associated with complex transactions, these documents go round and round and pass from roof to roof several times before the final signature. **A CLM platform avoids tedious negotiation in endless email chains and dozens of versions that leave plenty of room for error; instead, it centralises the entire negotiation** without leaving the platform and connects interested parties to maintain a secure, authoritative and fully version-historical trade.

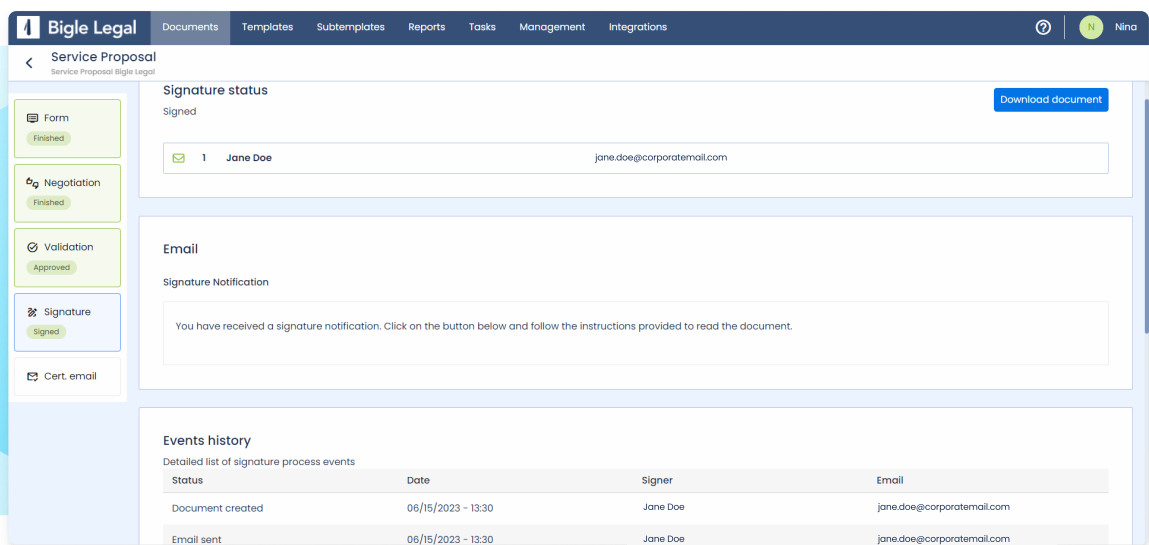
By reducing the time needed to negotiate and review contracts, many bottlenecks that previously delayed the closing of sales and other deals are eliminated. This allows sales teams to spend interacting with customers, understanding their needs and closing deals at the highest possible value. This creates a smoother and more agile experience, both for the sales team in terms of day-to-day work, and for customers, making a difference in a very demanding and competitive market.

2.4. CONTROL OF THE MANAGEMENT OF THE SALES TEAM AND REDUCTION OF ERRORS IN CONTRACTS/PROPOSALS

The sales team has so many open fronts that it is sometimes difficult to keep focused on tasks. Thanks to essential tools such as CRM or ERP, management is greatly facilitated, but when it comes to legal documents, integrating all of them with a CLM provides added security and efficiency. With this technology, commercial directors have greater control over the management of their teams: **They can monitor and track the progress of contracts, and it is easier to identify potential bottlenecks and allocate tasks in a way that optimises all processes.**



Example of the process of a service proposal from the commercial area from the initial point to the signing of the contract in Bigle Legal's CLM platform.



Description of the process of signing a commercial proposal on Bigle Legal's CLM platform.



The control of the commercial team is one of the strong points to be valued in the use of CLM because it guarantees the control of the entire content of the proposals, from the point of view of prices or the guarantee that the standard clauses are updated and simplified. This improved visibility during the negotiation process is one of the great advantages offered by technology.

In short, it ensures that all stages of the process are carried out as efficiently as possible. In addition, **by standardising templates and legal clauses, human error is reduced and consistency in contracts and proposals is ensured.** This not only improves the quality of the documents but also strengthens the trust and credibility of both the department and the company in the market.



3. Avoid contractual deficiencies that prevent and delay sales closings

3.1. DECENTRALISATION OF INFORMATION AND CONTRACTS VS. CENTRALISATION

One of the most common shortcomings that hinder the closing of sales and delay business operations is the decentralisation of information and contracts. When **each sales team member handles their own contracts and documents, they store them on their computer or in separate files in the cloud** and it is difficult to have an overview and coordinated view of all ongoing transactions. This leads to miscoordination and confusion, resulting in wasted time and errors in contracts.

On the contrary, **by centralising information and contracts in a single system or platform, the visibility, control and security of all business operations are improved.**

If it also has metadata, the CLM system makes it easy to find contracts by simply searching for any of the data reflected within the document. Organising, finding and managing documents is simple and the pertinent team members can access the most relevant documents quickly and accurately, giving them full control over the status of each transaction.

3.2. INSECURITY AND ERRORS IN OPERATIONS VS. SECURITY AND CONFIDENCE IN THE PROCESS

When business transactions are not supported by a robust and controlled process, they only create uncertainty and risk errors. **The traditional way of handling contracts, which requires professionals to perform manual tasks of all kinds, means that documents may contain contradictory clauses and inaccurate or inconsistent information.** This leads to legal contingencies of all kinds and affects the trust that clients and prospects place in the company.

By contrast, establishing a structured workflow and using appropriate automation and contract management tools, human error and operational failures are reduced. **Document automation and process standardisation minimise risks and ensure consistency in all business transactions.** In addition, centralising contracts in a CLM allows for more effective monitoring of deadlines, renewals and expirations, thanks to alerts that can be set up automatically. It is a way of taking advantage of multiple commercial opportunities so that there is no confusion of dates and they do not fall on deaf ears.



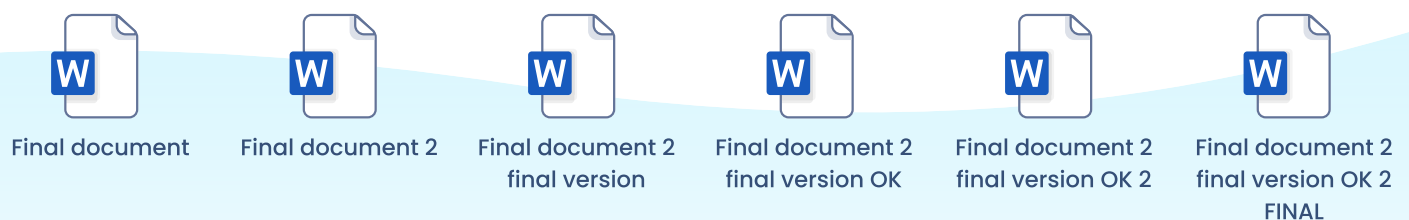


3.3. UNCONTROLLED PROPOSALS VS. BIRD'S EYE VIEW MONITORING

There are many fronts open in the commercial department and it is very common for a sales manager to have a certain lack of knowledge of the status of all commercial proposals. It is difficult to manage each case and keep it under 100% control, even more so to have exact knowledge of the status of each contract or legal document when negotiating with prospects. **This lack of control over commercial proposals leads to missed opportunities.** Without a clear view of all ongoing proposals, it is difficult to evaluate their effectiveness, identify successful patterns or detect possible improvements.

A CLM tool assists in proposal management and provides a birds-eye view of all cases for the commercial manager. Thanks to the **metadata** in the documents, it is possible to create views and reports to keep all documents in order, analysing deadlines or due dates, amounts, or the status of the negotiation in a few clicks. **It is an ideal complement to any CRM, as it eliminates additional contract concerns that arise when contracts are not under control.** This allows teams to assess their quality, ensure they comply with legal requirements, and to provide guidance on how to improve their effectiveness to increase the chances of closing successful sales.

The CLM allows you to monitor any changes made to the document and manage its versions in an agile way, in order to maintain control over the negotiation down to the last millimetre. It is a practical way of keeping a single version of each document up to date, with a history of changes so that you do not lose detail of the processes on the documents. It's a way to avoid situations like the following, which I'm sure you're familiar with:



3.4. INEFFICIENCY AND MISSED OPPORTUNITIES VS. SPEEDING UP PROCESSES

Contractual deficiencies lead to inefficiencies in sales processes, and this inevitably leads to missed opportunities. **When contracts take too long to create, review, negotiate and sign contracts, valuable time is lost for commercial departments, and there is a high potential that the opportunity could be lost.** The time that could have been used more effectively to close deals earlier and make progress on other agreements. We have already mentioned that time is money, and excessive delays in the sales process lead customers to look for alternatives, coincide with unfavourable economic contexts and cut budgets or lose interest in our offer.

Laying the basis for a collective strategy and effective collaboration between Commercial and Legal, together with the benefits of technology, speeds up processes, minimises inefficiencies and maximises opportunities. **The result?** A sales department coordinated with the business strategy and with tools to close deals faster and with a precision that differentiates it from the competition.





4. Test: assess your level of commercial contract and proposal acceleration

1. How do you create the contracts and legal documents for the department?

a) We create contracts with an automation tool connected to our CRM, in a matter of seconds.

Score: 20

b) We use an automated contract creation system, but it requires constant copying and pasting of information because it is not connected to the CRM.

Score: 15

c) We send a legal request, they create our contracts manually and then we request the necessary changes.

Score: 10

d) We create contracts manually, using Word templates provided by the Legal department.

Score: 1

2. How is the approval of contracts and legal documents done in the department?

a) The process is fully automated, through a platform we can review and approve contracts quickly from a dashboard.

Score: 20

b) We send the contracts by e-mail for approval and make the changes manually.

Score: 15

c) We print all contracts, take them to Legal, and they review them, change them and approve them manually.

Score: 10

d) No one reviews the contracts.

Score: 1

3. When creating legal documents, which tool do you use?

a) We use a CLM, which incorporates a document automation module to create them automatically and in a standardised way.

Score: 20

b) We use a document automation tool.

Score: 15

c) We use an online editor such as Google Docs.

Score: 10

d) We use a word processor such as Word.

Score: 1

4. How do you store contracts in the department?

a) We store contracts in the cloud, on a CLM or contract management platform.

Score: 20

b) We have all our contracts and templates stored in a CRM.

Score: 15

c) We have an internal folder server where we store the contracts or they are printed and filed in physical folders.

Score: 10

d) Each employee stores their contracts locally on their computer.

Score: 1

5. Is technology used to monitor commercial activity and create KPI reports with contract information?

a) Measurement and analysis is fully automated and a CLM with a reporting module is used for capture and exploitation.

Score: 20

b) We use a CRM system where we monitor the funnel and then create reports by hand with excels.

Score: 15

c) We track in Excel which we modify as needed.

Score: 10

d) We do not carry out any monitoring for analytical purposes in this regard.

Score: 1

6. How do you monitor the quality and compliance of the company's contracts?

a) Thanks to a CLM, we have automated processes and comprehensive status control and follow up with a dashboard of risks, obligations and contract renewals.

Score: 20

b) Legal indicates maximums and minimums, standards on which we work in word templates.

Score: 15

c) We have sent the contracts to the legal department and are awaiting their approval.

Score: 10

d) No measures are put in place to control legal content.

Score: 1

At the end of the test, **add up the score obtained for each answer** to find out the level of acceleration of commercial proposals and contracts:

Overall score:



91-120: A

Excellent automation and control of legal processes and contracts.



70-90: B

There are signs of digitisation, but there is still room for improvement.



40-69: C

Insufficient automation and control, measures should be taken to improve.



39>: D

Automation and control are very poor, urgent measures need to be implemented.

If your score is B, C, or D, do not hesitate to contact us, and we will help you to turn around the acceleration of your commercial offers and contracts.

Contact: ✉ sales@biglelegal.com 🌐 www.biglelegal.com

About Bigle Legal

Bigle Legal is a cloud-based all-in-one Contract Lifecycle Management (CLM) software that automates the legal operations of companies, improving security and minimising the risk of legal contingencies. The platform is flexible, intuitive and provides full control over the entire document lifecycle.

Bigle Legal's CLM incorporates Artificial Intelligence, an AI based on natural language processing (NLP) that facilitates contract management and offers tools that make document automation easier.

The company is a pioneer in the field of no-code document automation, with a global presence, and its customers include large companies and large law firms. Bigle Legal's mission is to make Legal Operations Easy.

To learn more about Bigle Legal, visit the website: biglelegal.com

For other enquiries, please contact communication@biglelegal.com

By using Bigle Legal, you contribute to saving natural resources



323 million
Kg of wood



7,1 billion
Litres of water



725 million
Kg of CO²



47 million
Kg of waste

