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Inside a Legal Tech Rollout

Practical Lessons Learned

July 2025

Webinar Housekeeping

- All attendee cameras and mics are off.
- The webinar is being recorded.
- Drop your questions in the Q&A box.
- Provide your feedback on the post-webinar survey.

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Agenda

- Change Management
- Working With Your Vendor
- Data Migration
- Metrics & Reporting

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Meet your speakers

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Jean Yang
Vice President, GTM Strategy & AI Transformation

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Stasha Jain
Deputy General Counsel and Vice President, Legal Operations

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Onit is a global leader of legal-related, smart workflow solutions across the enterprise: legal, compliance, sales, procurement, IT, HR and finance departments.

3,000+
Corporate customers

13,500+
Law firm customers

650+
ELM customers

1,000+
Contracts customers

24/7
Call center support

AI
Center of excellence

London
Frankfurt
Pune
Auckland

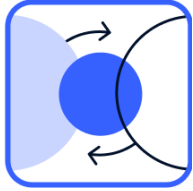Atlanta, HQ

San Francisco

Austin

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AI AGENT STUDIO

Knowledge Agent

Risk Agent

WORKFLOW APP STUDIO

Matter Agent

Investigations

Self-Service Doc Generation

Request Agent

ENTERPRISE LEGAL MANAGEMENT

CONTRACT LIFECYCLE MANAGEMENT

Legal Service Request

Matter

Secure Data Room

Contract Request

Spend Agent

Benchmarking

eSignature

Contract Agent

Chat Reporting

Repository & Tagging

Legal Hold

Spend Management

Onit AI Legal System of Record

Negotiation & Approvals

Vendor Approval

Secure · Compliant · Global · O · Extensible · Open · Prescriptive

O ELM   O AI Agent Studio   O CLM   O Workflow Studio

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Poll Question One:

# Where are you in your implementation journey?

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The Project

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Goals of the Project

Enhance Operational Efficiency

As the company grows and evolves, we are now streamlining our multiple contracting workstreams into a single source of truth to reduce bottlenecks and improve efficiency. Also includes an integration with Salesforce to minimize data entry.
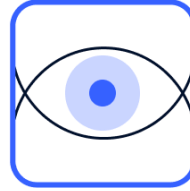
Reduce Risk and Errors

By create a single process for all contracts, we lessen our potential for human error, missing approvals, and costly mistakes.

Improve Collaboration Across Teams

The upgraded CLM system fosters seamless communication and understanding of our contracts to ensure cross-functional understanding and efficiency.

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CLM Expectations

- All contracts must be processed through the Contract Lifecycle Management (CLM) system
  - *Any contracts that are routed outside of CLM will not be honored or routed to* Accounting/Billing
  - *Discontinue use of previous contracting or repository systems*

- Client-related contracts require an associated Salesforce opportunity
  - *Initiate CLM requests through Salesforce (additional details to be provided)*
  - *Questions for client-related contracts can be sent to Services Deal Hub for assistance*

- Following today's training, questions and assistance can be routed through the channels below
  - Onit | CLM Go Live | Teams
  - Office hours will be announced where you can bring any questions. In addition, please use the Teams channel for the training session to post any immediate questions.

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Change Management

Key Takeaways:

- You can never have too much communication

- Who are your key stakeholders and what's in it for them?

- Do you have project buy-in?

- Make it fun (no one likes change)

- Do you have training that works for your company and culture?

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# Working with your Vendor

Data Migration

Key takeaways

- Do you really need it?

- How much data clean-up do you need to do?

- What data do you need for reporting & metrics?

Questions

Reporting & Metrics

- Consider your audiences and what they care about?

- What does your business care about? What do they measure in other areas of the business?

- What do you need to improve the function of your legal department?

- What data do you actually have today and what would you need to build it out?
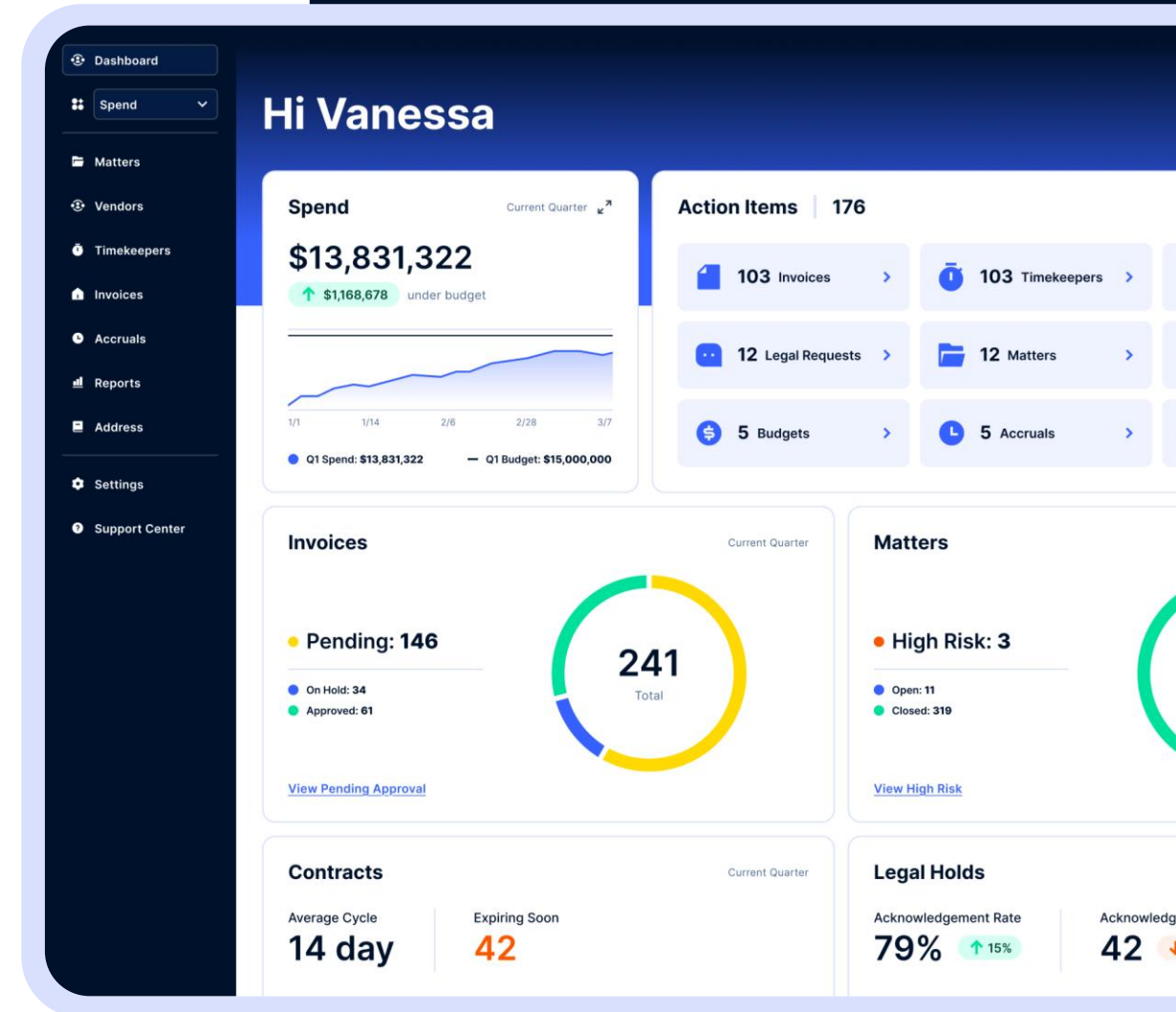
3 Month Metrics

772
CLMs Created
(avg of 9 a day)

378
(49%)
Legal Involved

506
(65%)
Fully Executed

162
Prof Services Related

89
Vendor Agreements
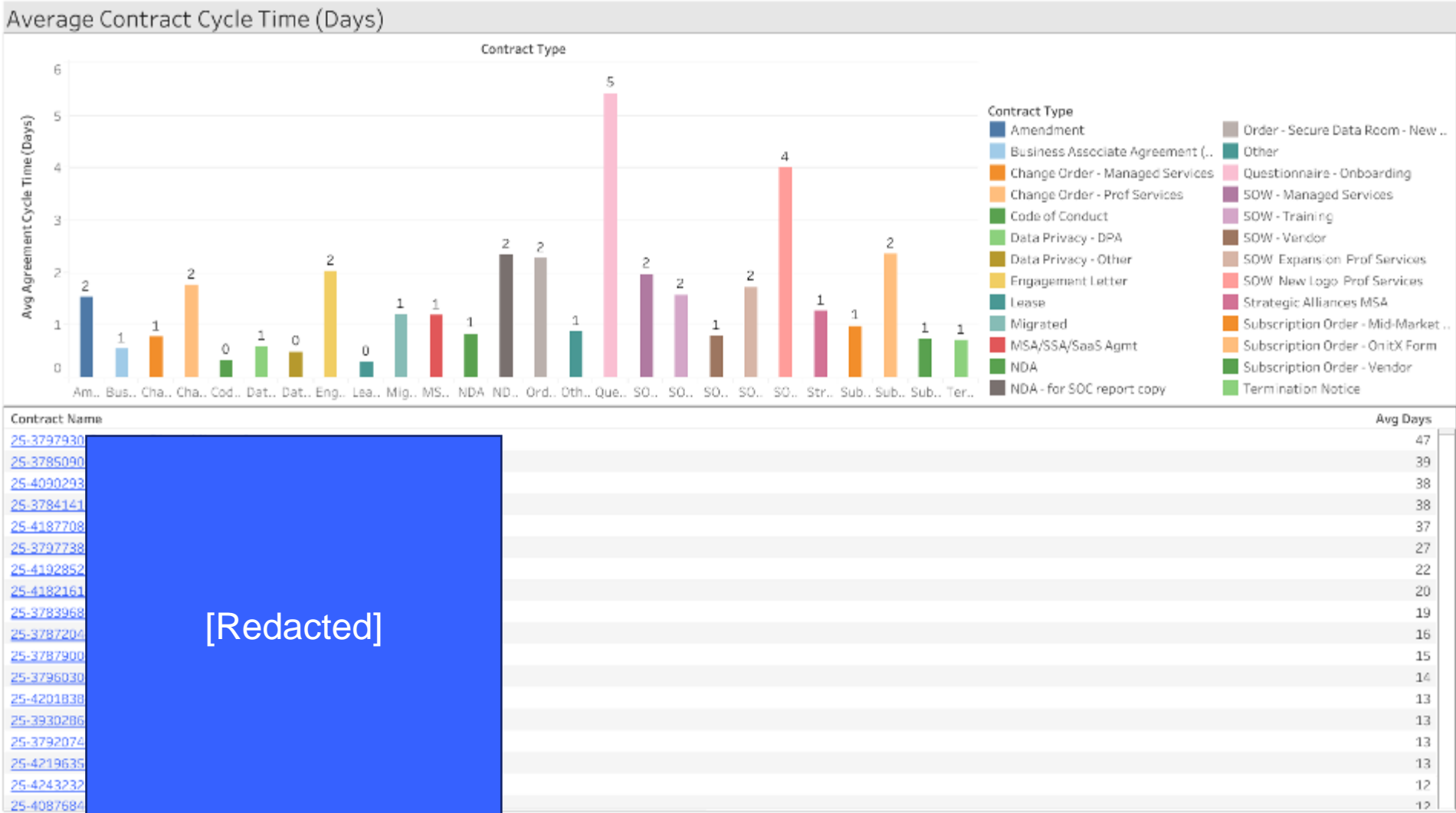
161
(20%)
Not Completed in
CLM

160
(20%)
Other Party Paper

2
Self-Service
(Fully Automated)

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Average Contract Cycle Time

Poll Question Two:

Are you leveraging AI in your legal department?

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What's Next?

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Q&A

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Thank you!

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