

Playbook automation with ContractExpress® for Salesforce

Summary

Lawyers trust ContractExpress to automatically configure signature-ready contracts for users without a lawyer unless required. Users love not waiting in line for a lawyer to draft their contracts, and love the automated playbooks for quicker closings.

ContractExpress

For over ten years, corporations including Cisco and Microsoft and law firms including Clifford Chance and Wilson Sonsini have been using ContractExpress to automatically configure legally trusted contracts.

The benefits ContractExpress customers enjoy include:

- Dramatically faster contracts, giving more time at quarter-end to close business
- \$1,000+ of reduced law firm spend for every hour ContractExpress saves their lawyers
- Improved legal consistency and reduced risk
- Trusted metadata for managing contracts and reporting

These benefits are now available to Salesforce users as a native Salesforce app

To create a contract, business users complete a ContractExpress questionnaire inside Salesforce. The dynamic questionnaire only asks relevant questions. Account and opportunity information is automatically included as required. Users immediately get customer-ready PDFs if their answers are complete and compliant. All this in just minutes without being forced to wait in line for a lawyer to find time to manually draft their contracts – especially at quarter end when the race is on!

Unlike all other contract management solutions, ContractExpress dramatically reduces the lawyer's in-tray by automatically generating contracts from the users' questionnaire, only involving the lawyer if the contract is non-standard. Our customers call this "PDF or lawyer". Legal is freed from drafting standard cookie-cutter contracts to focus on non-standard matters and help close business. Everyone wins.

ContractExpress' automated playbooks streamline negotiation and bring forward closings. Business users can respond to their customers by selecting pre-approved alternatives on the questionnaire without involving a lawyer – unless the automated business rules deem that a lawyer's involvement is required.

And when a lawyer is required, the lawyer's first and best option is to use questions visible only to lawyers to select alternative legal options from an automated legal playbook, without immediately needing to open and manually edit the document in Word. Compared to manual editing and manual playbooks, this is quicker, more consistent, more accurate, and produces trusted metadata for the subsequent management of the contracts and reporting.

Trust is the key

Unless the contract creation and approval process is trusted by Legal, self-service contract creation is not possible and automated playbooks are not viable. A lawyer will need to look at every contract for every user and make all changes manually. All the potential benefits of automated contract creation are lost.

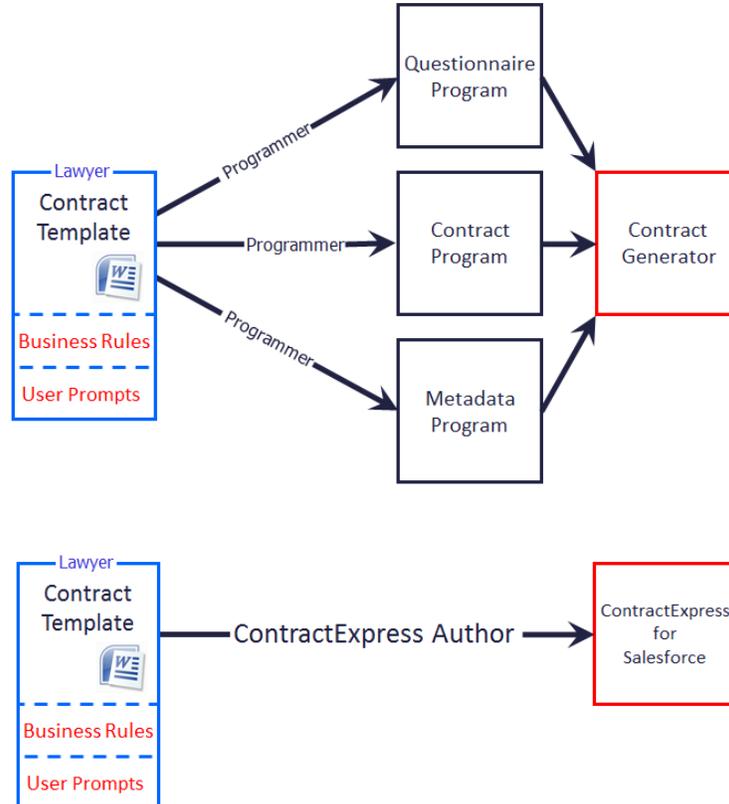
The key to establishing legal trust is not needing programmers to automate the lawyer's contract templates at the heart of the automated contract creation process.

Not needing programmers eliminates the time required for programming, eliminates programming misunderstandings and the lawyers' fear of misunderstandings, reduces the need for legal testing, puts the lawyer in control and increases legal trust.

Not needing programmers also dramatically reduces the time required to apply legal updates – essential if the templates are to be kept up to date and not fall into disuse.

ContractExpress uniquely eliminates the need for programmers by automatically utilizing legally intuitive mark-up in the template to determine the behavior of the questionnaire, generated contracts, and contract metadata. All in standard Word and using standard Word styling.

All other contract automation solutions



This capability is unique to ContractExpress, is the subject of multiple international patents, is the reason for the success of ContractExpress in global corporations and law firms, and is now [available in Salesforce for your organization](#).