Legal Service Delivery

- Legal Service Delivery in ServiceNow refers to a set of services

and processes provided by legal departments or organizations

within the ServiceNow platform.

- It aims to streamline and automate legal processes.

- Legal Service Delivery in ServiceNow can also help in tracking and

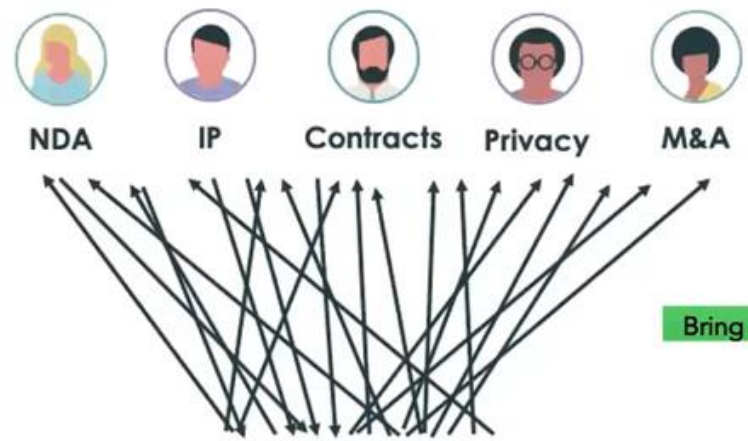
reporting legal metrics.

Agenda

- Legal Self Service
- Legal Request Management
- Legal counsel center
- Legal Matter management
- Legal Operations Dashboad
- Practice Areas
- Reference List

Legal Service Delivery

- Unstructured processes



"I need legal approval for a request to collect personal information at a conference."

Employee

"How do I obtain a patent?"

"Can legal review this content…"

Bring order and insight

- Streamlined approach

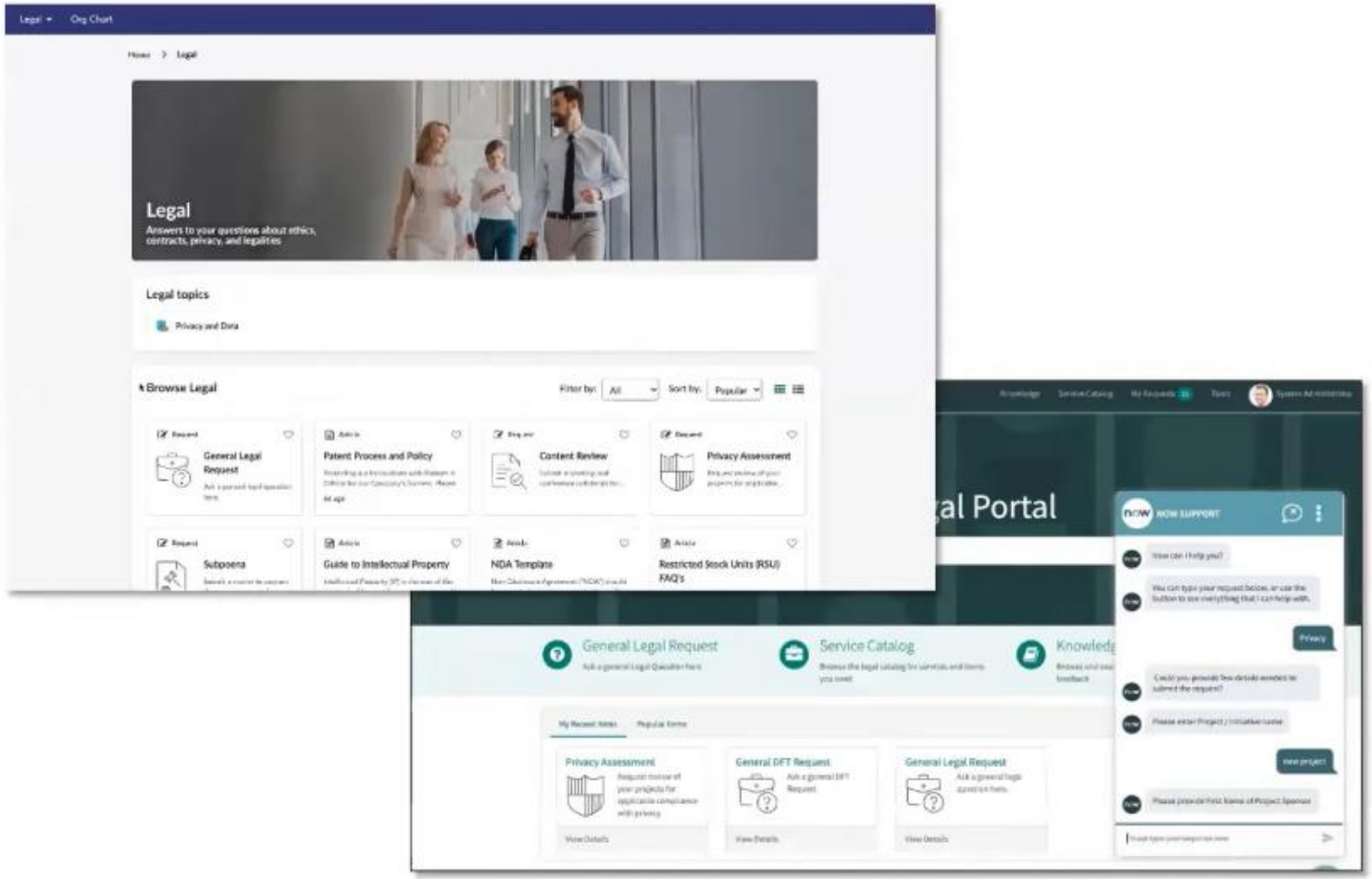
Now Platform

Intake

Employee

Legal self-service

Deliver 24x7 legal service help



Outcomes

Remove manual email processes with an engaging self-service portal

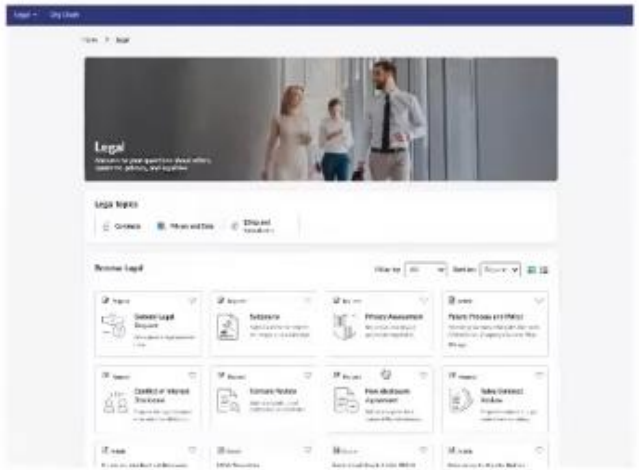
Automate responses for common legal requests with virtual agents

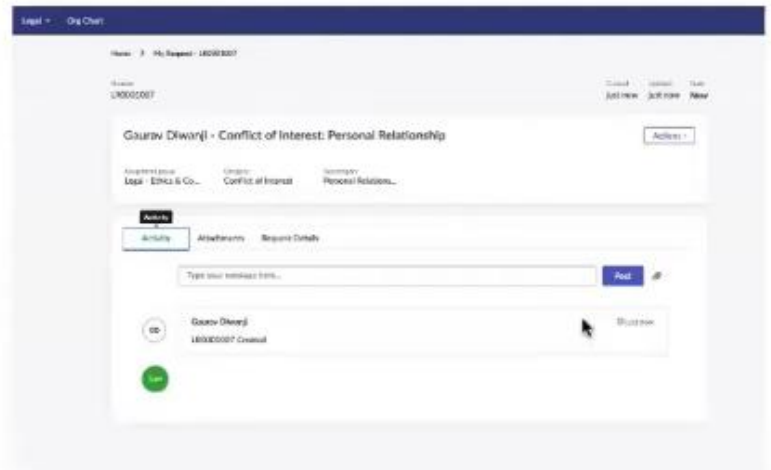
Configure and deploy out-of-the-box or company-specific workflows for any legal scenario

Legal self-service

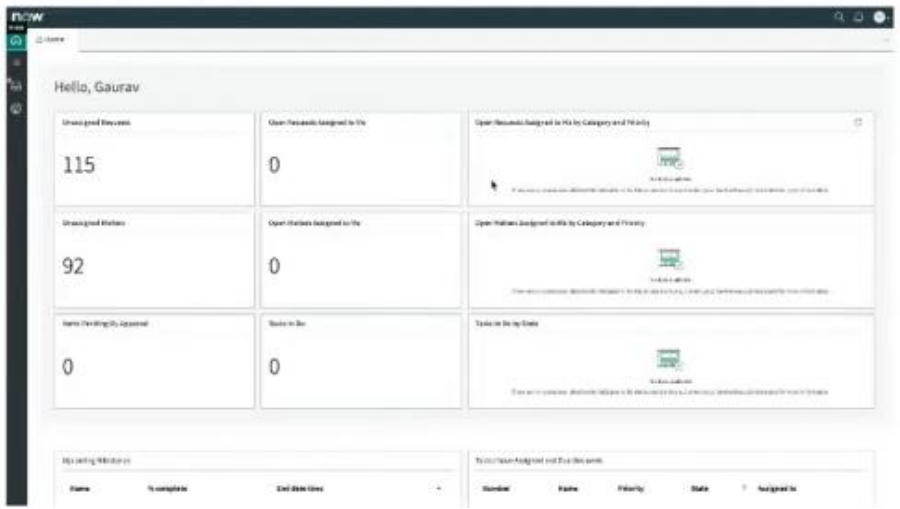
Intake Forms and Legal Counsel Center

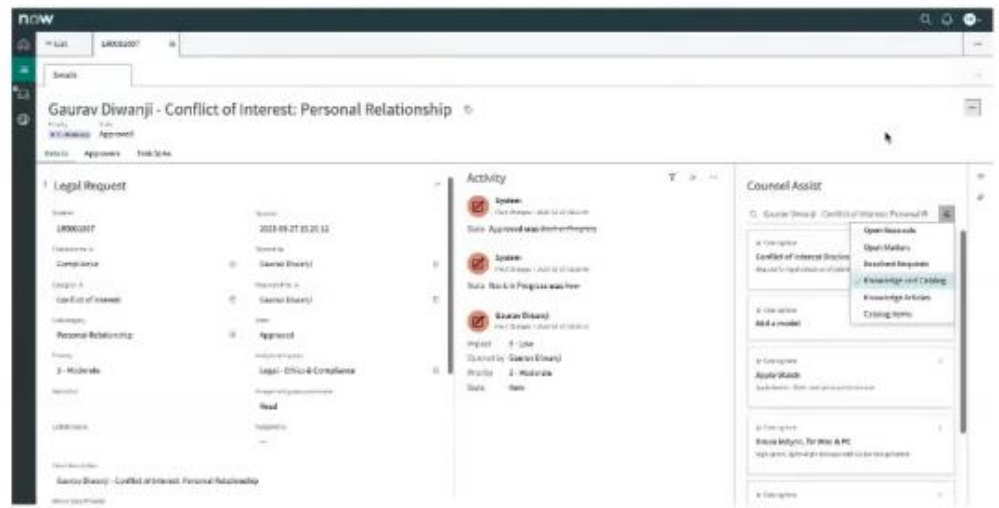
Requester





Legal Ops Team





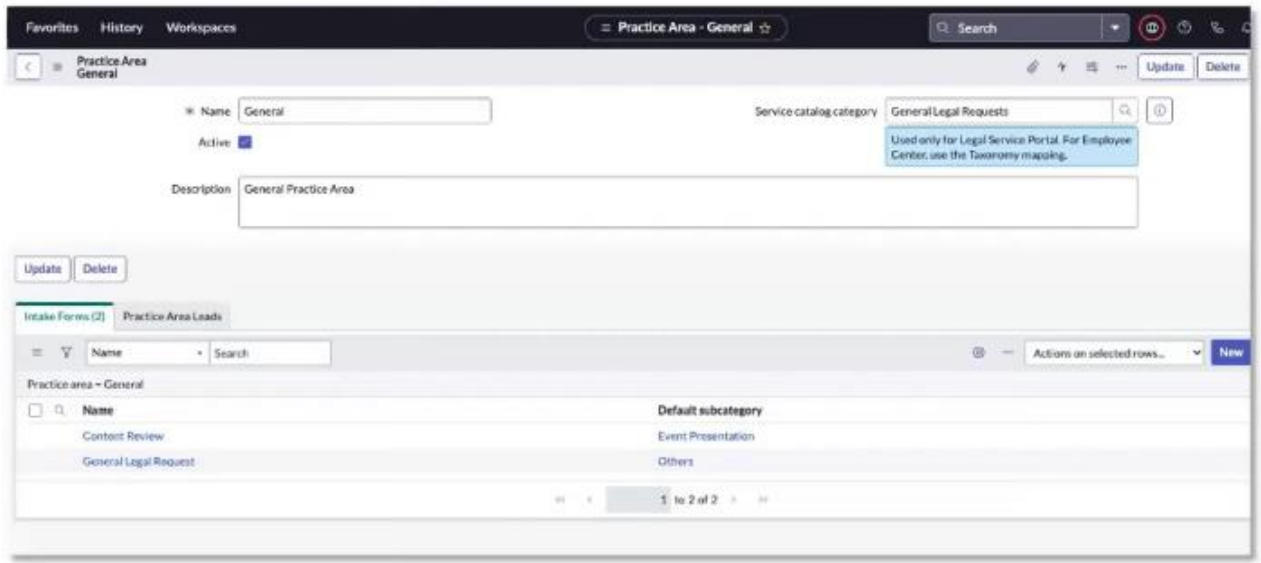
Legal Request Management

Configurations Items

Practice Area: Specific areas of law practice, such as Intellectual Property, Privacy, or Compliance. Configure intake forms and leads associated with each practice area.

- Several delivered Practice area tables available OOB that extend Legal Requests table.

Note that legal matters has a similar practice area tables that extend the Legal Matter table.



For more information, see Configure a practice area table.

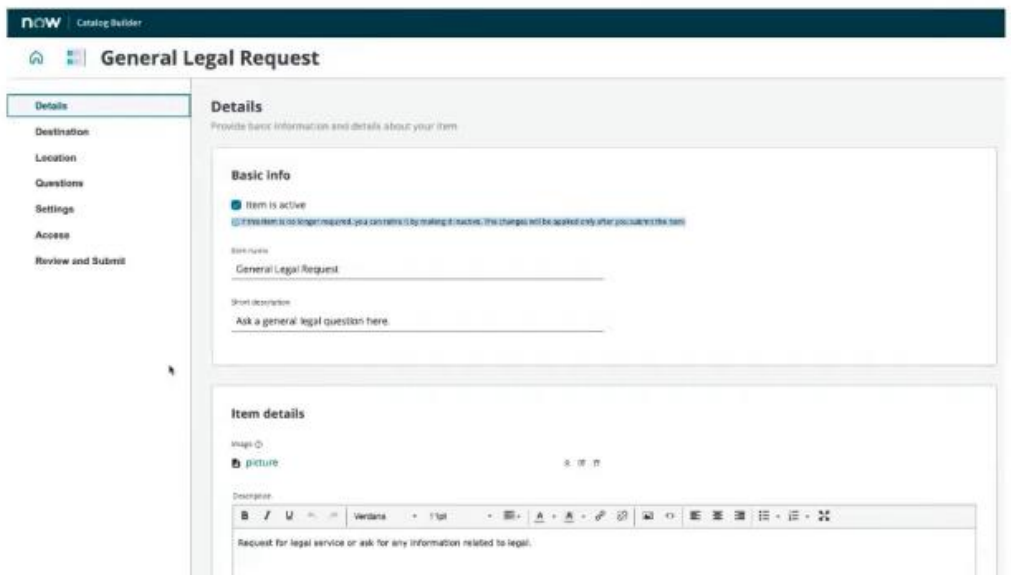
- Compliance [sn_lg_ops_compliance]
- Corporate Support [sn_lg_ops_corporate_support]
- Crime [sn_lg_ops_crime]
- Digital Forensics [sn_lg_ops_digital_forensics]
- Ethics [sn_lg_ops_ethics]
- General Contract Support [sn_lg_ops_general_contract_support]
- General Legal [sn_lg_ops_general_legal]
- Government Affairs [sn_lg_ops_government_affairs]
- Health, Safety and Environment [sn_lg_ops_health_safety_and_environment]
- Labor and Employment [sn_lg_ops_labor_and_employment]
- Legal Operations [sn_lg_ops_legal_operations]
- Licensing and Tech Transactions [sn_lg_ops_licensing_and_tech_transactions]
- Litigation [sn_lg_ops_litigation]
- Marketing Support [sn_lg_ops_marketing_support]
- Mergers and Acquisitions [sn_lg_ops_mergers_and_acquisitions]
- Patents, Trademark and Trade Secrets [sn_lg_ops_patents_trademark_and_trade_secrets]
- Privacy and Data Security [sn_lg_ops_privacy_and_data_security]
- Procurement Contract Support [sn_lg_ops_procurement_contract_support]
- Real Estate [sn_lg_ops_real_estate]
- Sales Contract Support [sn_lg_ops_sales_contract_support]
- Stock Plan Support [sn_lg_ops_stock_plan_support]

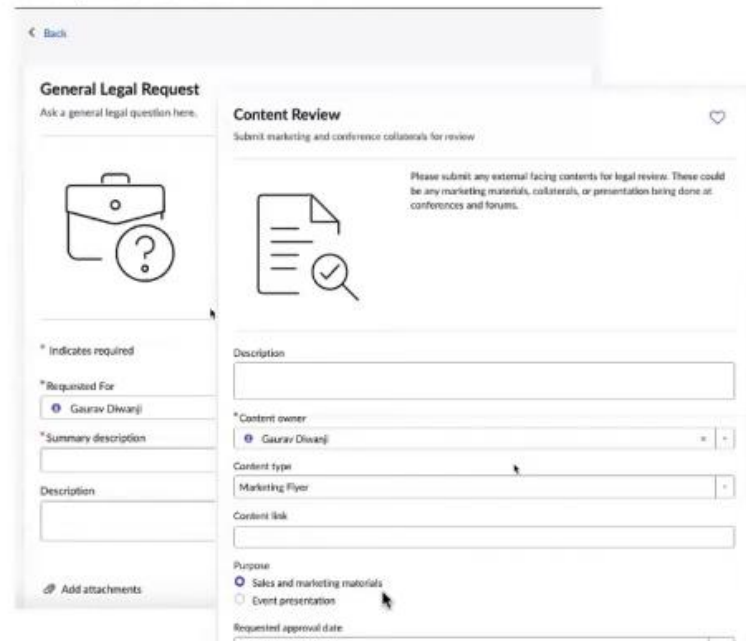
Legal Request Management

Configurations Items

Record Producers

- Create new record producers, or use/ modify delivered record producers to capture intake.
- Record producers are linked to tables extending Practice App tables extending Legal Request or Legal matter tables.
- Catalog builder can be used to simplify the process of creating record producers.

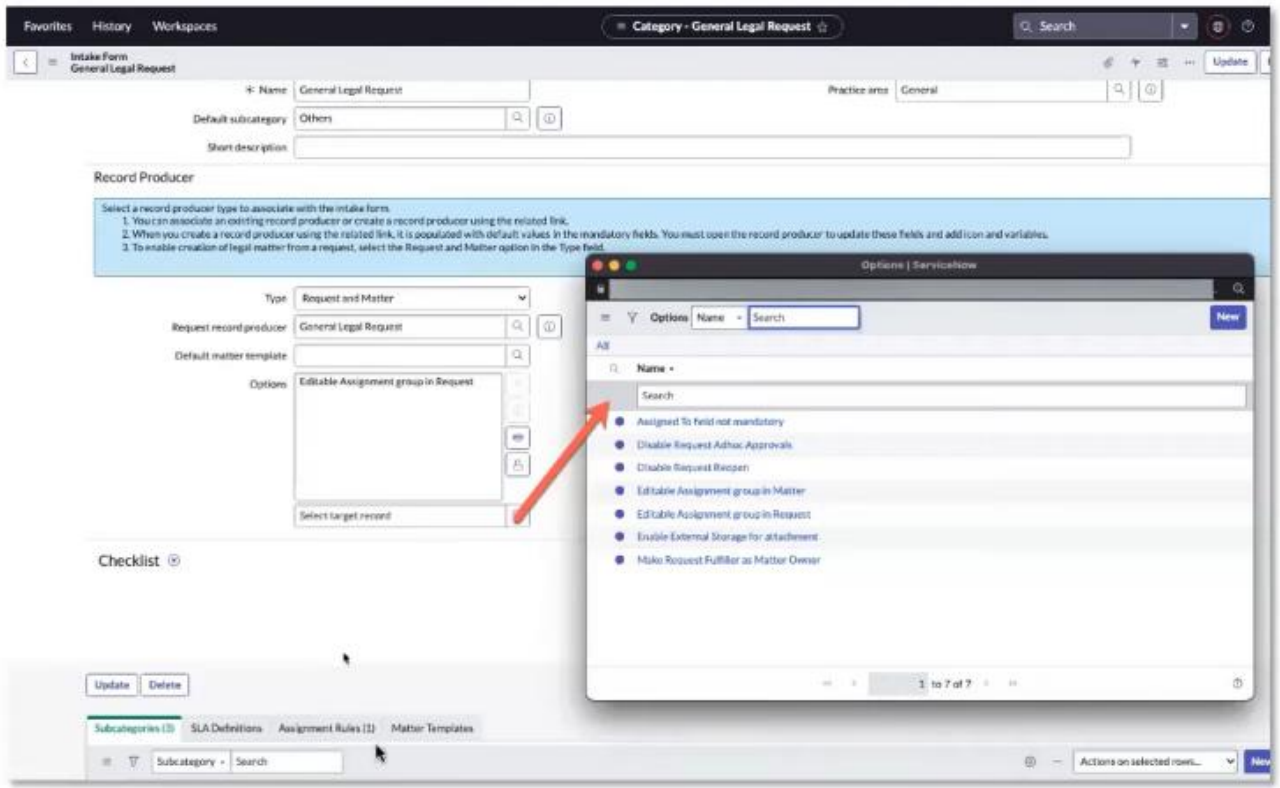




Legal Request Management

Configurations Items

Intake Forms Employees can use these intake forms on the Legal Service Portal to submit Legal Requests or Matter.



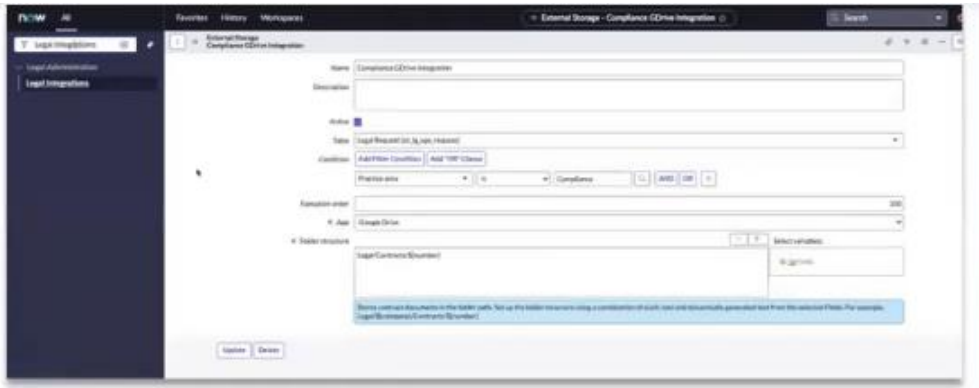
- Record Producers built on the Practice Area table extending Legal Requests are associated to Legal Intake forms.
- Options can be set for Legal Request/ Matter.
- Intake Forms can be tied to a Request, Matter, or both.
- Legal categories, sub categories should be created and associated to Intake forms.

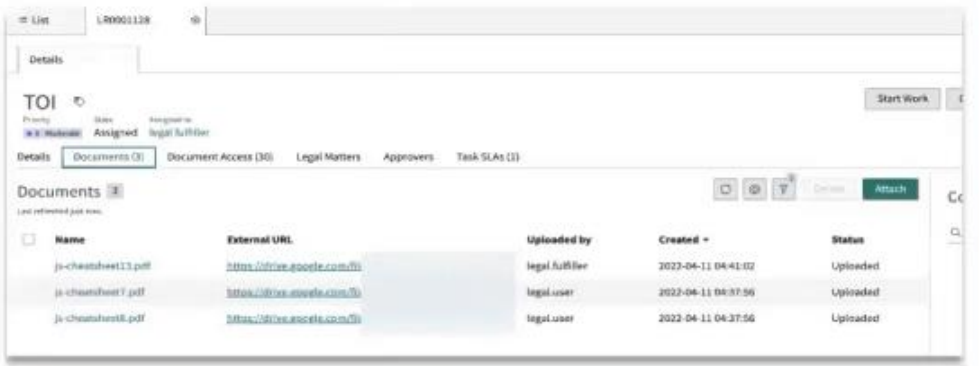
Legal Request Management

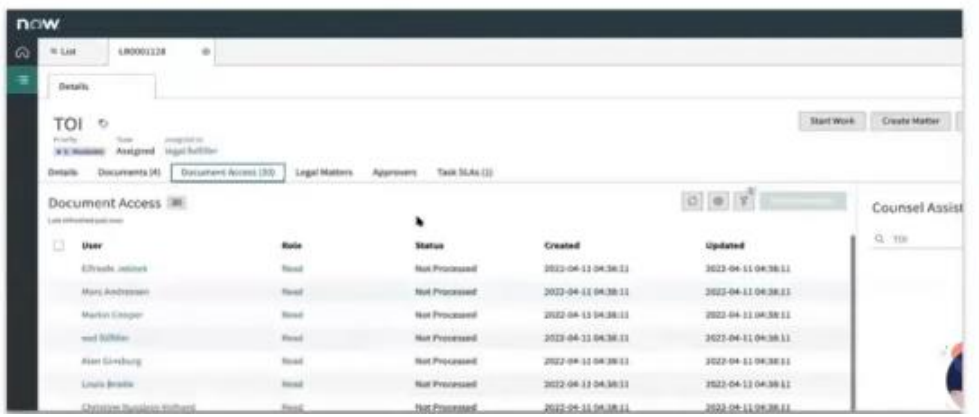
Configurations Items

- **External Storage System** (Optional)
- Store documents attached to legal requests by the requester or the fulfiller. Enables the organizations to have a centralized documentation management and retention policy.
- Box, Google Drive, OneDrive, SharePoint are storage systems that can be integrated with - this is supported via the Spoke architecture.
- Note that the trigger conditions on the OOB flows may need to be updated based on business requirements for Legal Contracts External Storage Flow.
- Note that by default, all users who have read access to the Request are granted access to the folder in the external system to read the files - this can be modified.
- The External Document Storage feature can used to store *Matter Artefacts* as well as signed *Contracts* in the Simple Contracts practice area application.

Product Documentation



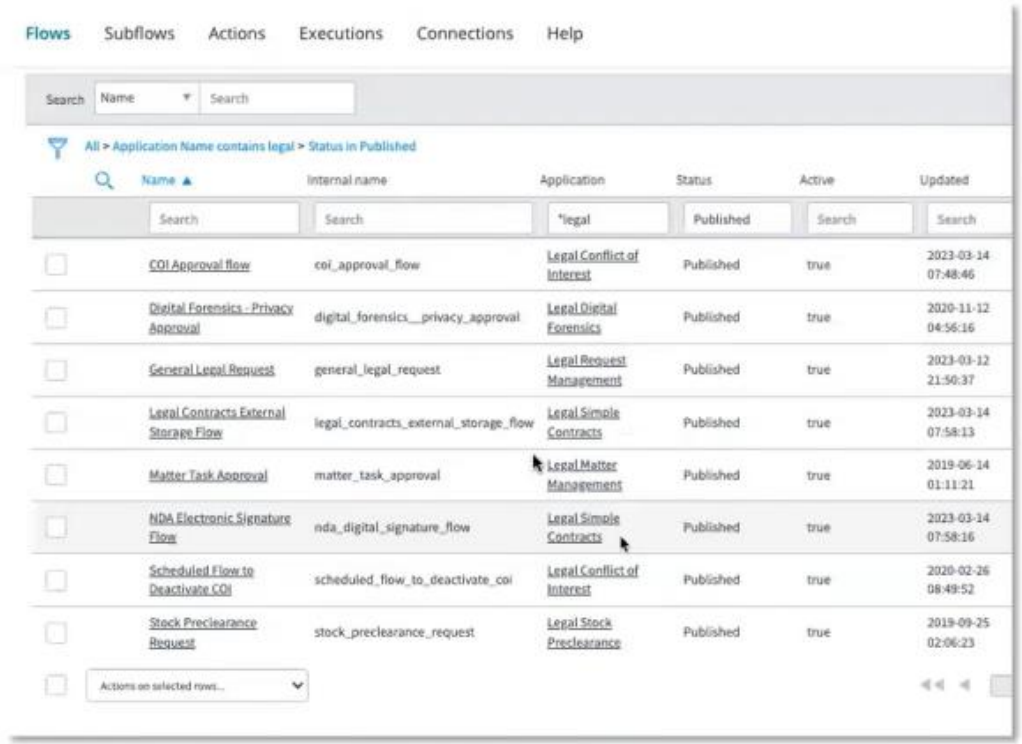




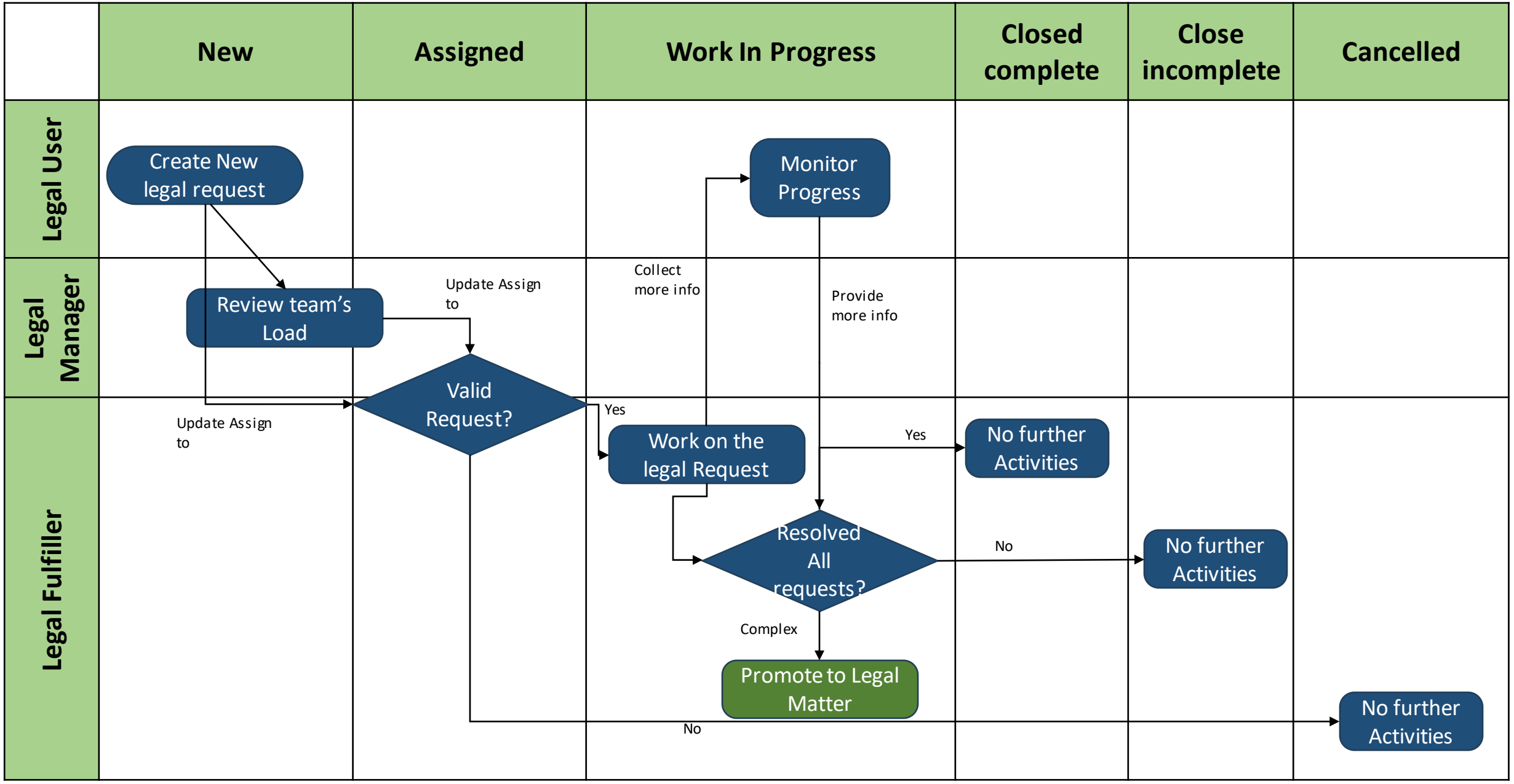
Legal Request Management

Configurations Items

- **Notifications** Configure notifications to be sent when various events occur.
- **Assignment Rules** Assignment rule for an intake form to assign the associated legal request and matter to a legal group or user.
- **Legal Knowledge Base** (For request deflection): Create Knowledge articles in delivered Legal Knowledge Bases, Categories or create new ones as need as a Level 0 support mechanism.
- **Response Templates** Create or modify a response template with a reusable message that legal fulfillers can use to send users quick and consistent messages. Documentation Link.
- **Modify/ review/ Create Flows** When using a Legal Practice App, modify/ review the delivered workflow to align with your organization's legal process.



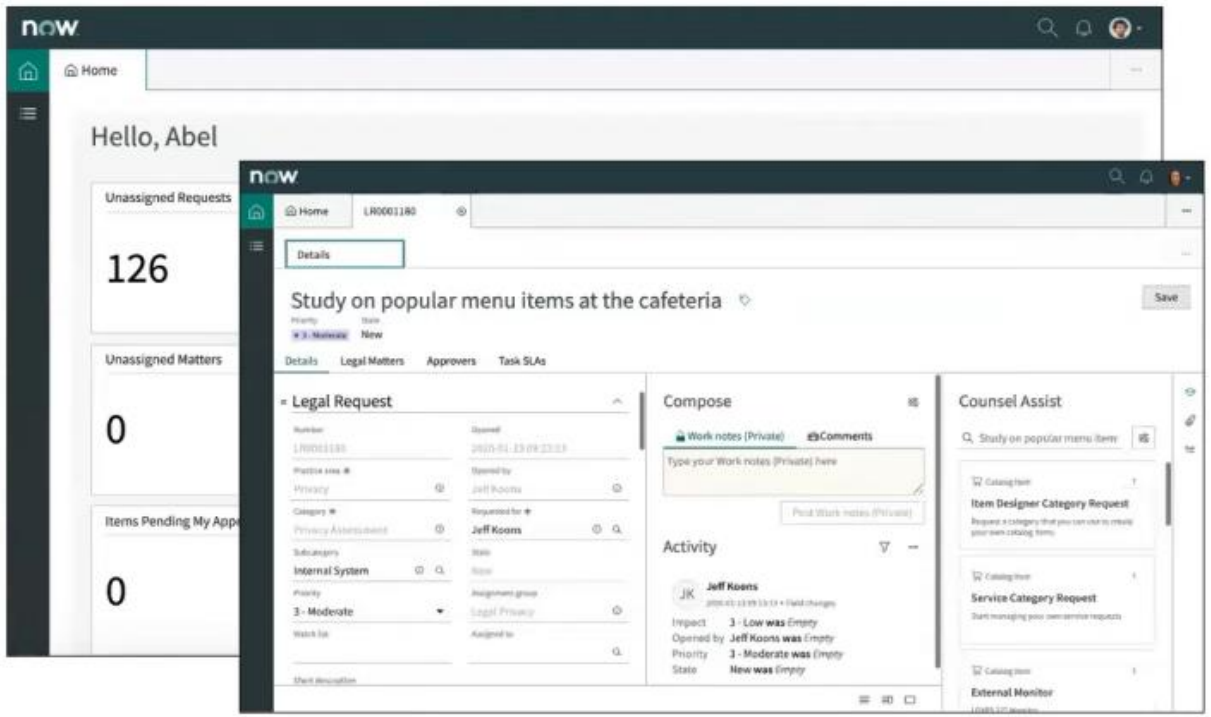
General Life Cycle of LSD



Legal counsel center

Simplify and automate service practitioner experience

Plugins needed: Legal Counsel Center (sn_lg_workspace) application



Outcomes

Move from unstructured email tasks to automated workflows

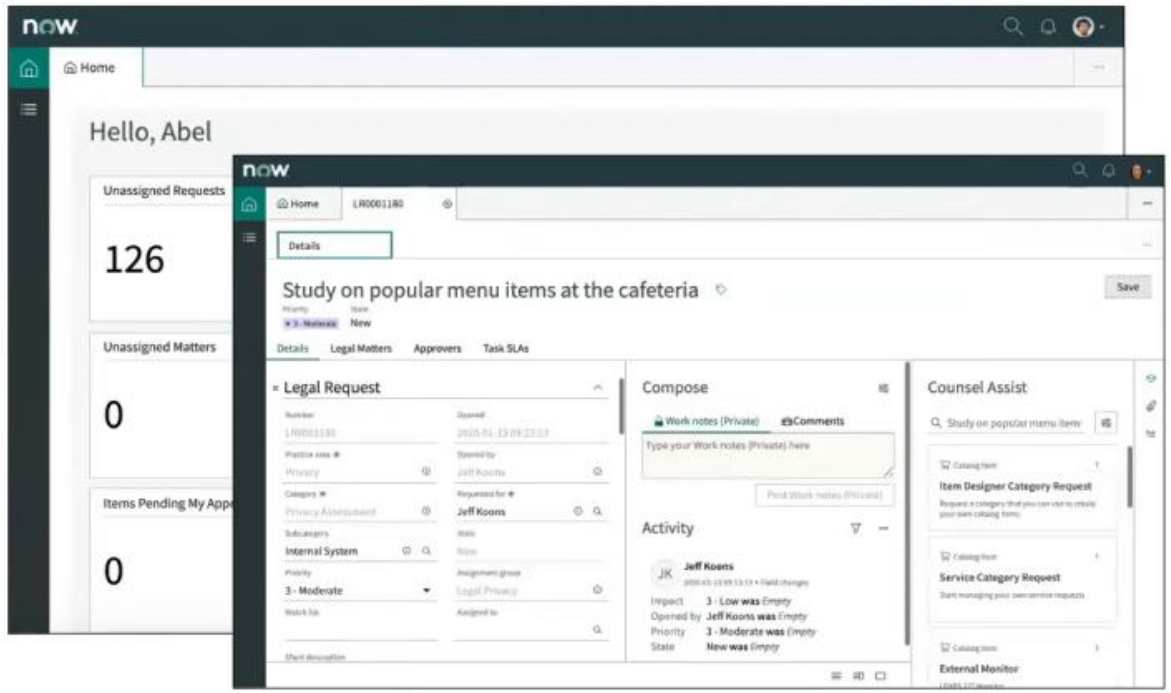
Automatically categorizes and assigns legal requests for rapid response

Work on multiple requests and legal matters concurrently with an optimized counsel center

Legal counsel center

Simplify and automate service practitioner experience

Plugins needed: Legal Counsel Center (sn_lg_workspace) application



Outcomes

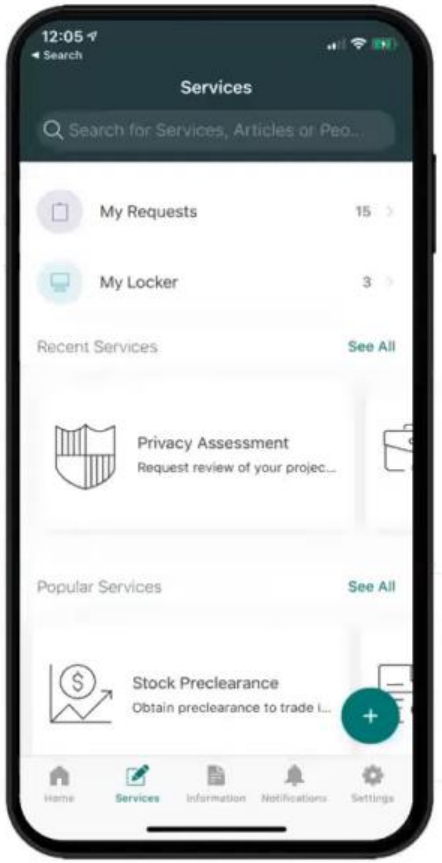
Move from unstructured email tasks to automated workflows

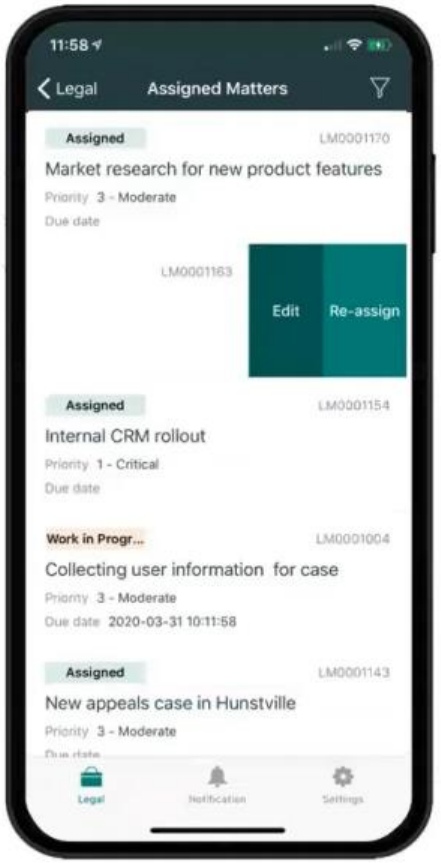
Automatically categorizes and assigns legal requests for rapid response

Work on multiple requests and legal matters concurrently with an optimized counsel center

Native mobile apps

Help employees and legal teams get work done anywhere





Outcomes

Legal Self-service with a click or a swipe

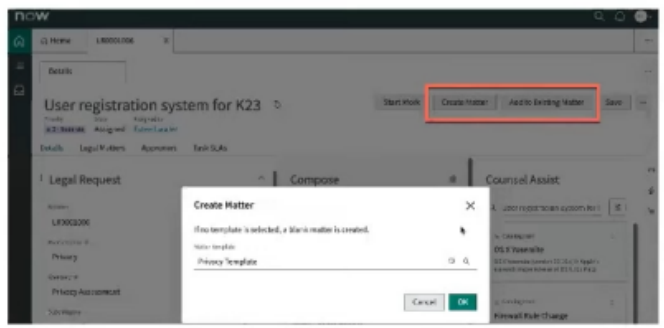
Act on approvals and to-dos

Quickly view and respond to tasks on the go

LEGAL MATTER MANAGEMENT

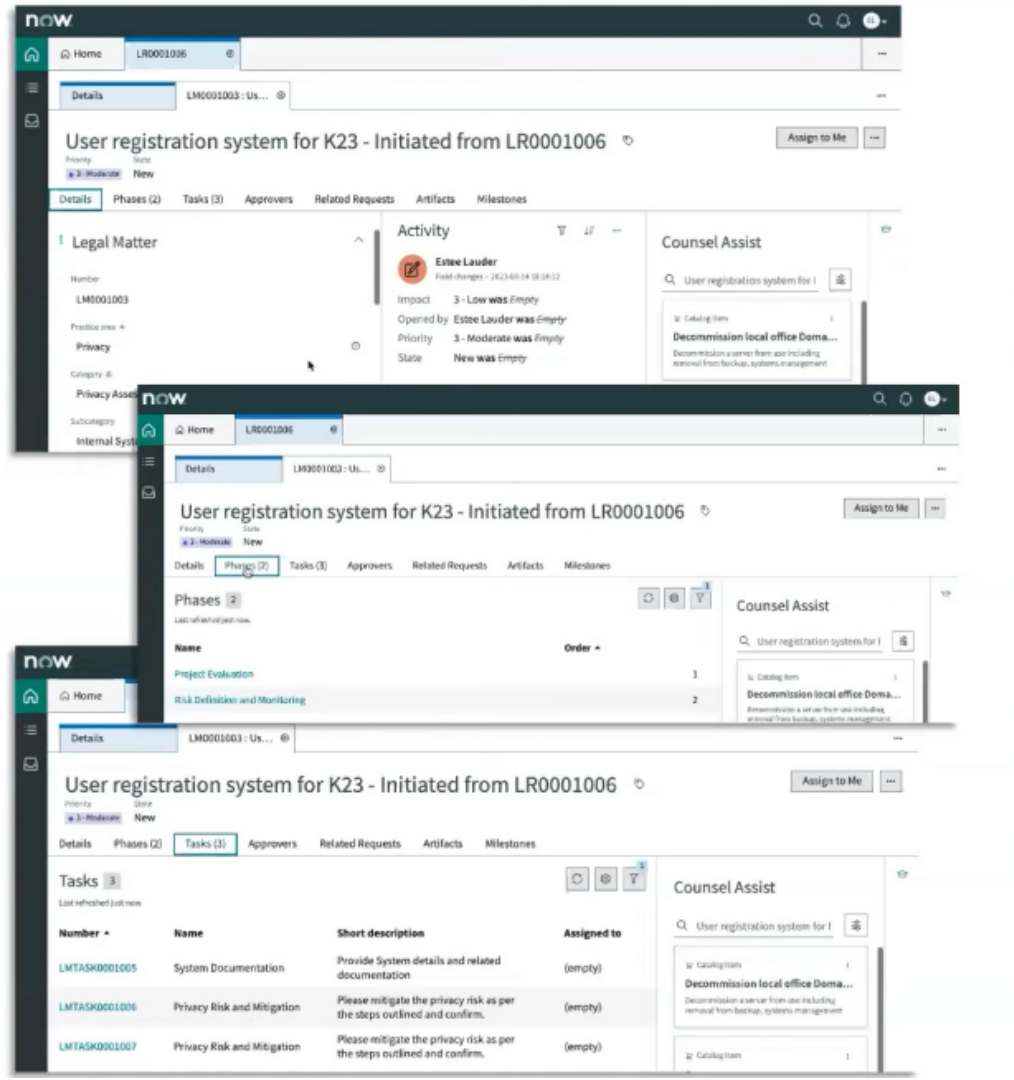
Legal Matter Management

- A Legal Matter is created when additional collaboration, cross-functional tasks, task tracking, document storage is needed to resolve a matter.
- You can create a legal matter in two ways:
  - A legal request can be promoted to a legal matter if the request needs additional investigation and substantial time to work on.



  - A practice area lead can create a legal matter directly. These matters do not have any parent legal request though related requests can be added to them.
- A Legal Matter can have Tasks, Phases, Milestones, Artifacts, as well as related Legal Requests associated to it.

[Documentation Link]

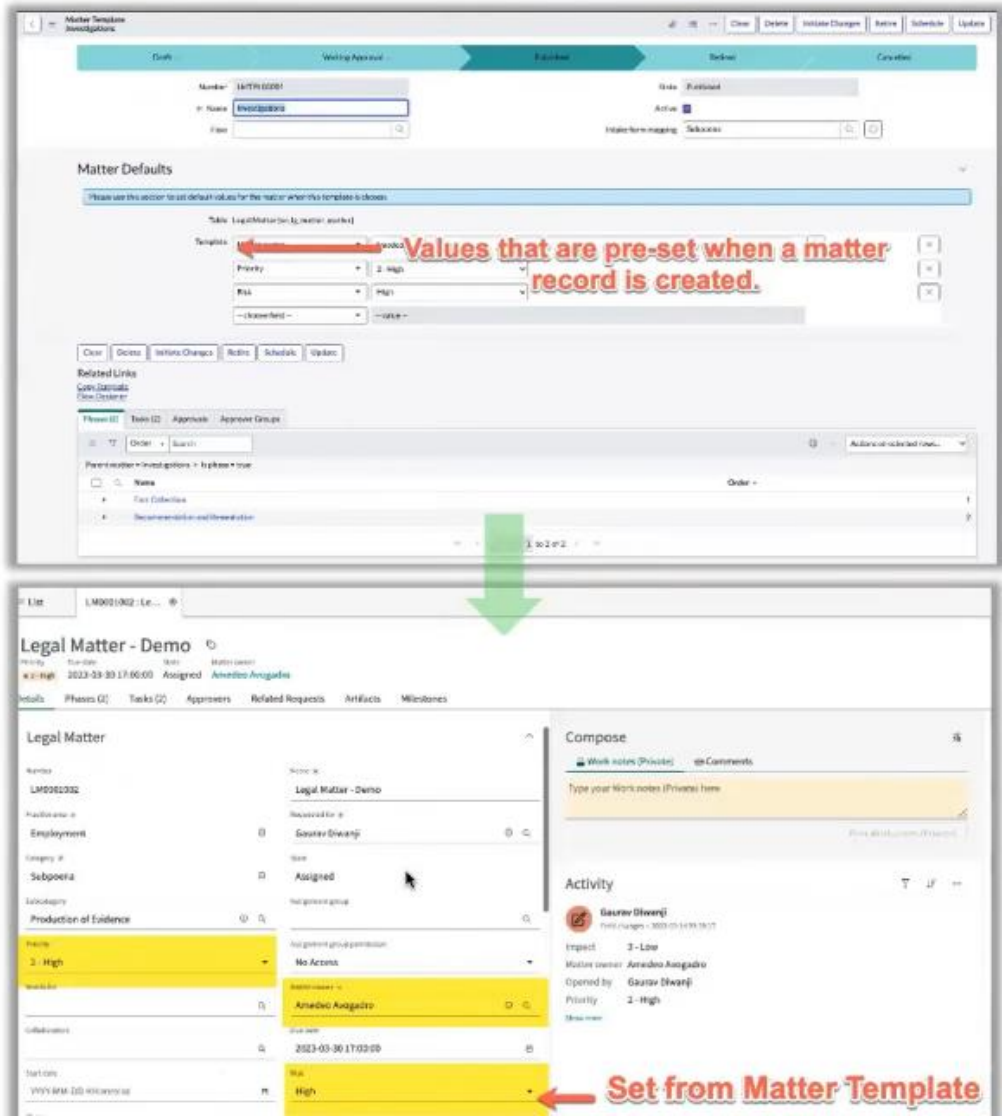


Legal Matter Management

Configurations Items

- **Matter Templates**
- When a new Legal Matter is created, or a Legal Request is promoted to a Legal Matter, the legal ops team can be given an option of selecting a Matter Template.
- The Matter Template can be used to create pre-defined Tasks, Phases.
- Matter Templates are use to standardize legal procedures for handling legal matters.
- A matter template needs to be approved and published before it can be applied to subsequent Legal Matters.

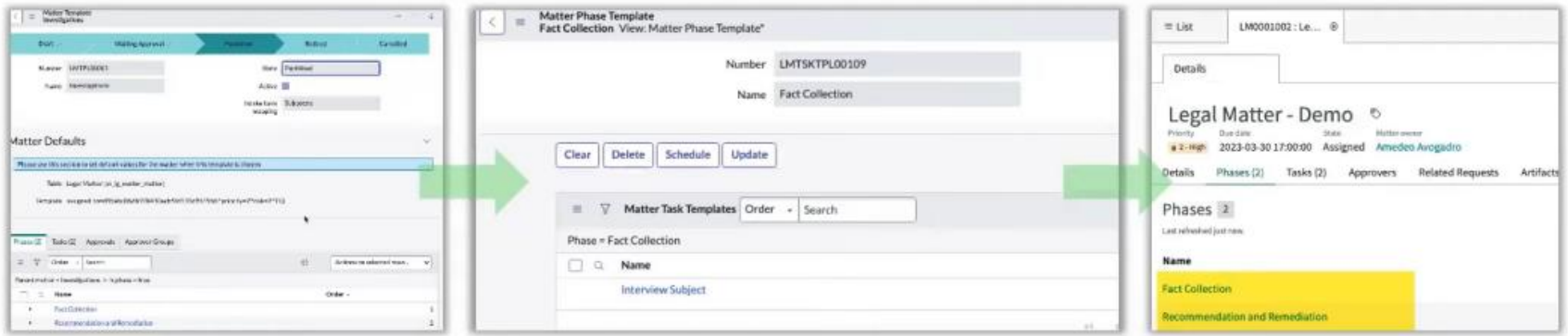
Documentation Link



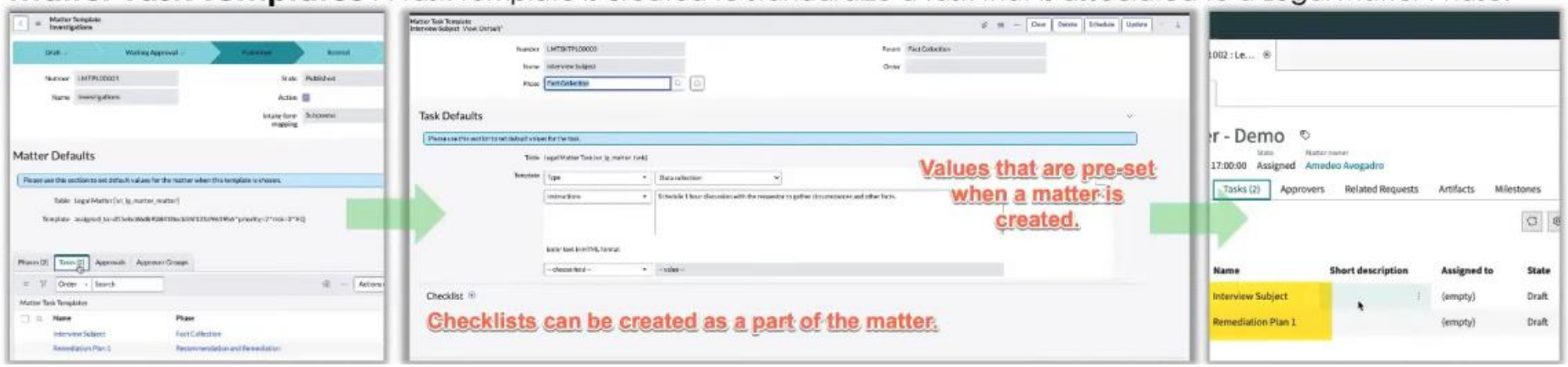
Legal Matter Management

Configurations Items

- **Matter Phases** A phase can be created in a Matter Template to standardize procedures for handling legal matters.



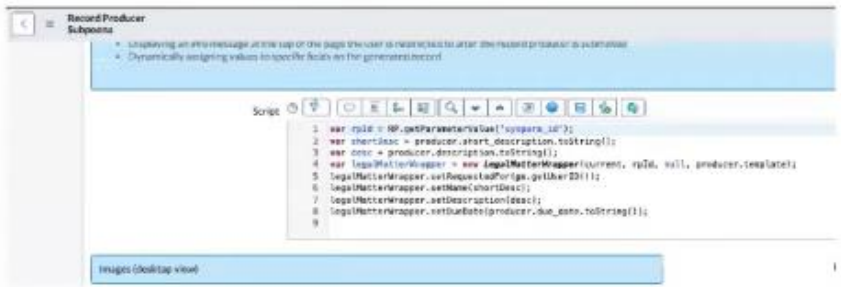
- **Matter Task Templates** A Task Template is created to standardize a task that is associated to a Legal Matter Phase.

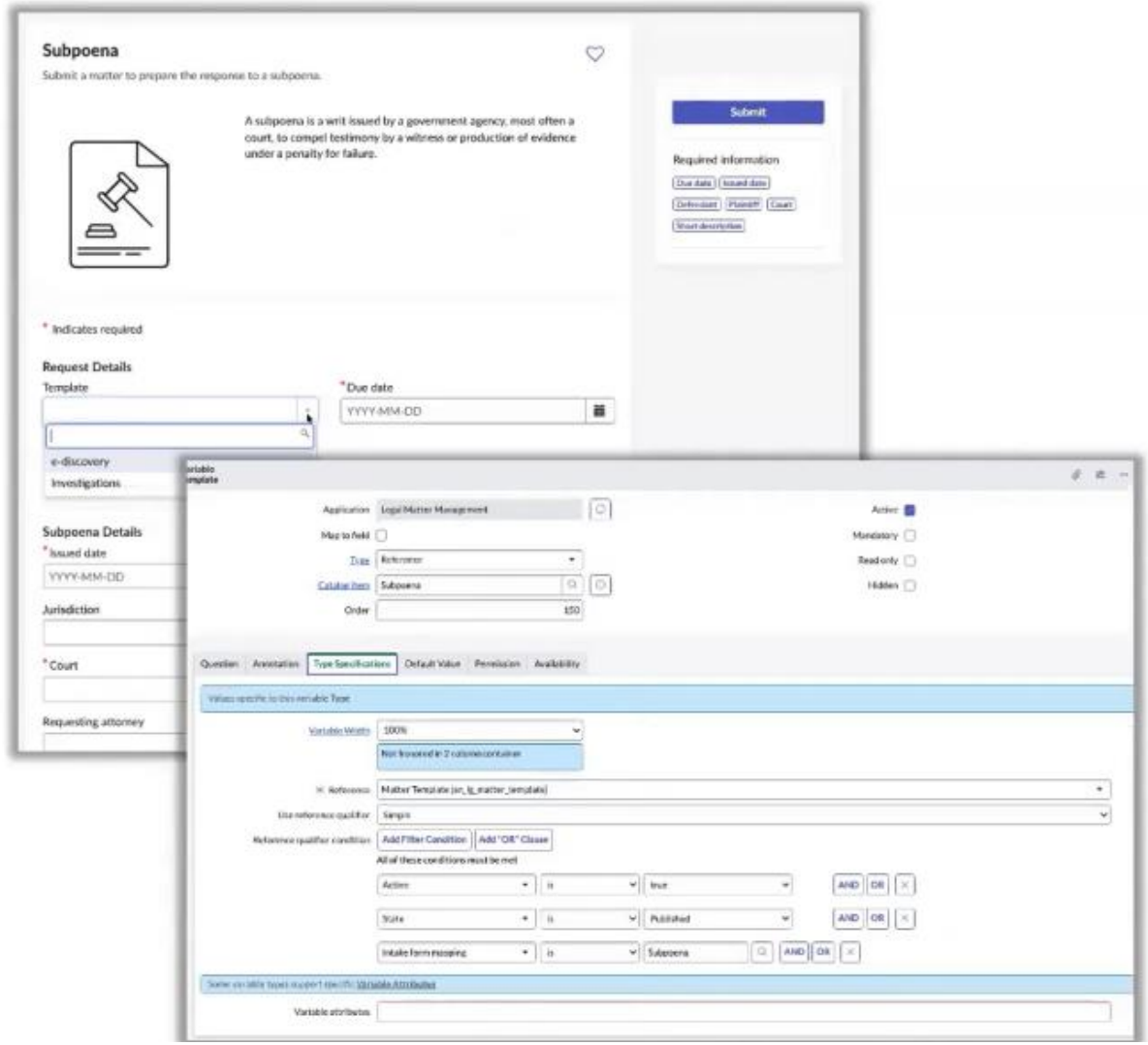


Legal Matter Management

Configurations Items

- **Record Producer** If a record Producer is created and associated to an Intake form for matter, it must be built on the Legal Matter (or an extended Practice Area) table.
- A template variable can created to allow the Legal Ops team to choose the template for this matter.
- A script such as as the one below, using *legalMatterWrapper* object can be used to associate the selected template to the that matter this is created. This script can be used to populated



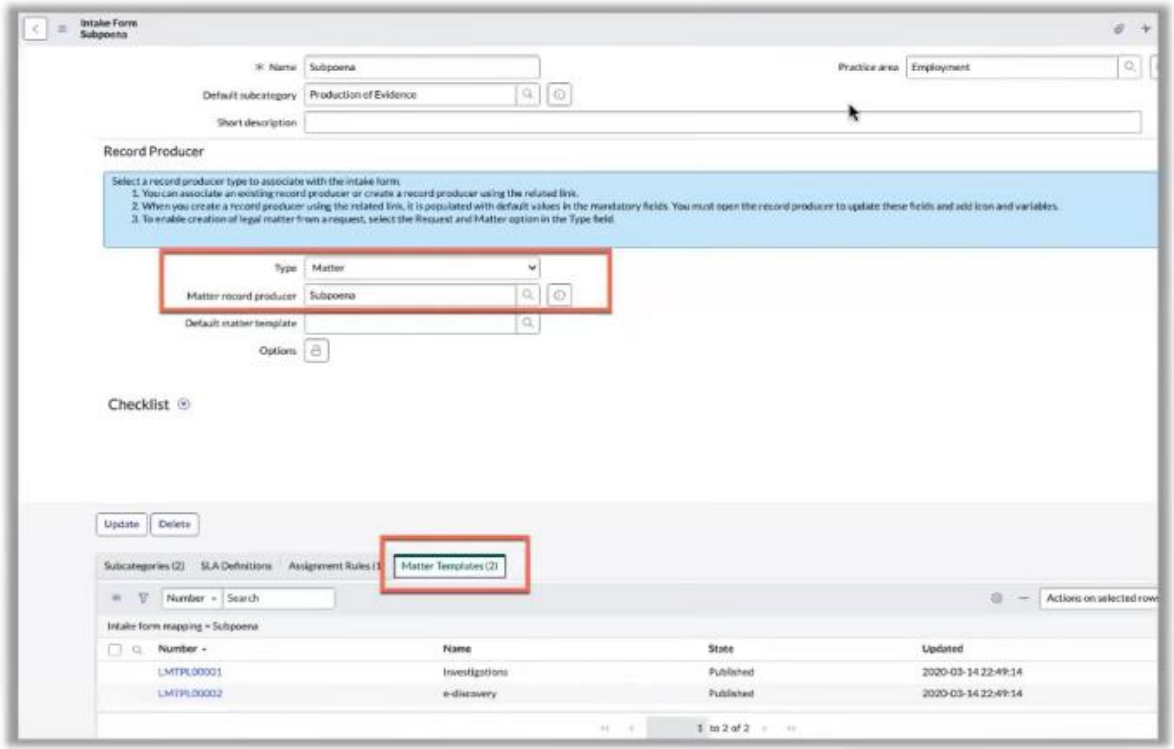


Legal Matter Management

Configurations Items

- **Intake Forms** Intake forms can be created for Legal Ops team to create Matters, similar to Legal Requests.

- Record Producers built on the Practice Area table extending Legal matters are associated to Legal Intake forms related to matter.
- If a Legal Request can be promoted to matter, select 'Request and Matter' in the type field and link to the Request Record Producer.
- A default matter template as well as applicable matter template for this Intake form can be specified.

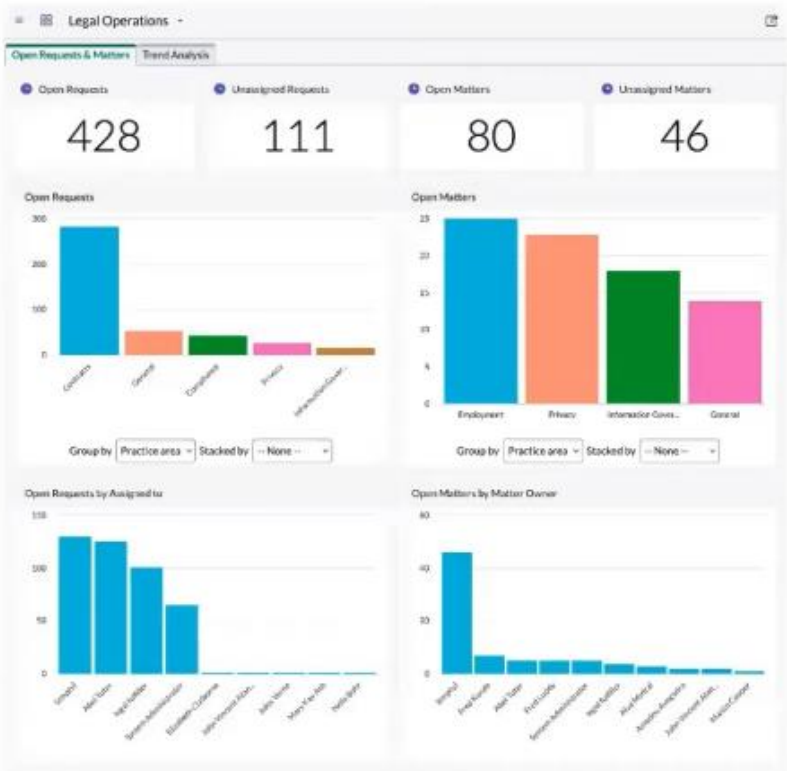


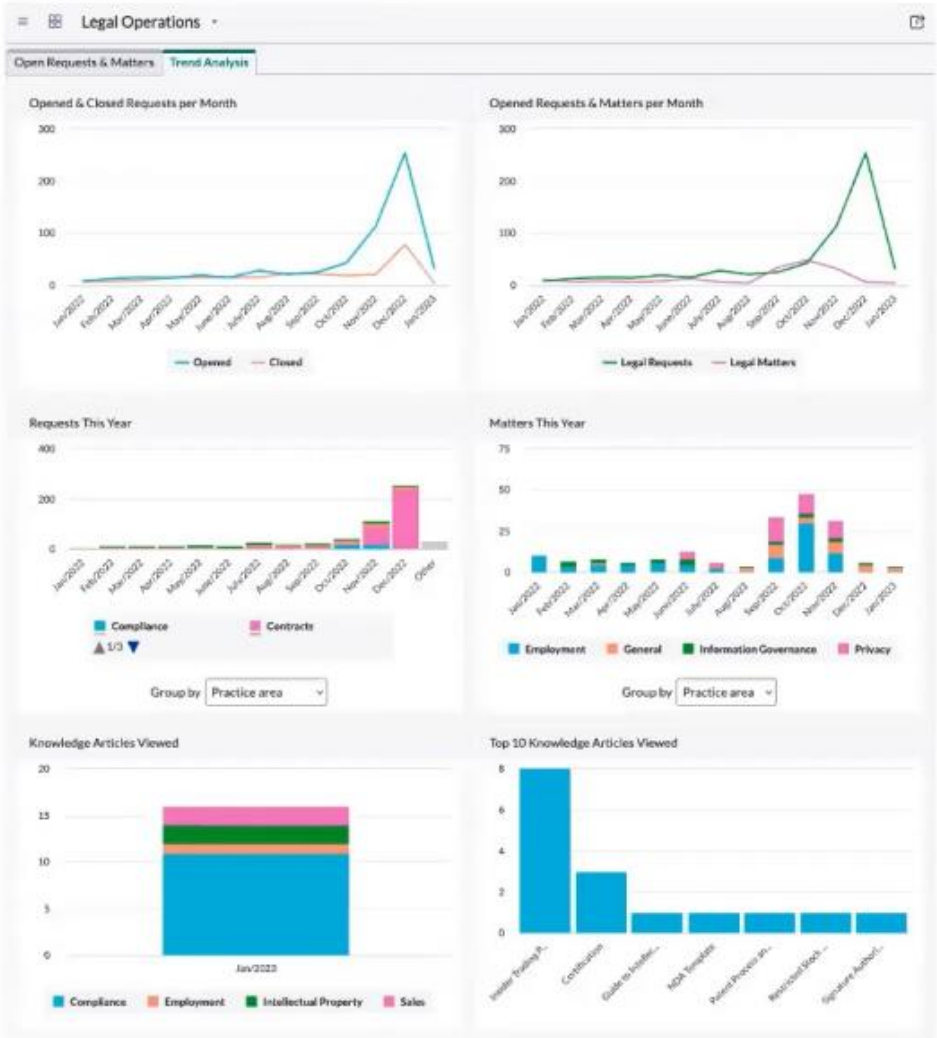
Legal Operations Dashboard

Persona: Legal Department

The Legal Operations dashboard provides comprehensive reports to the legal department. The dashboard uses Performance Analytics to provide reports and metrics on legal requests and legal matters.

Documentation Link





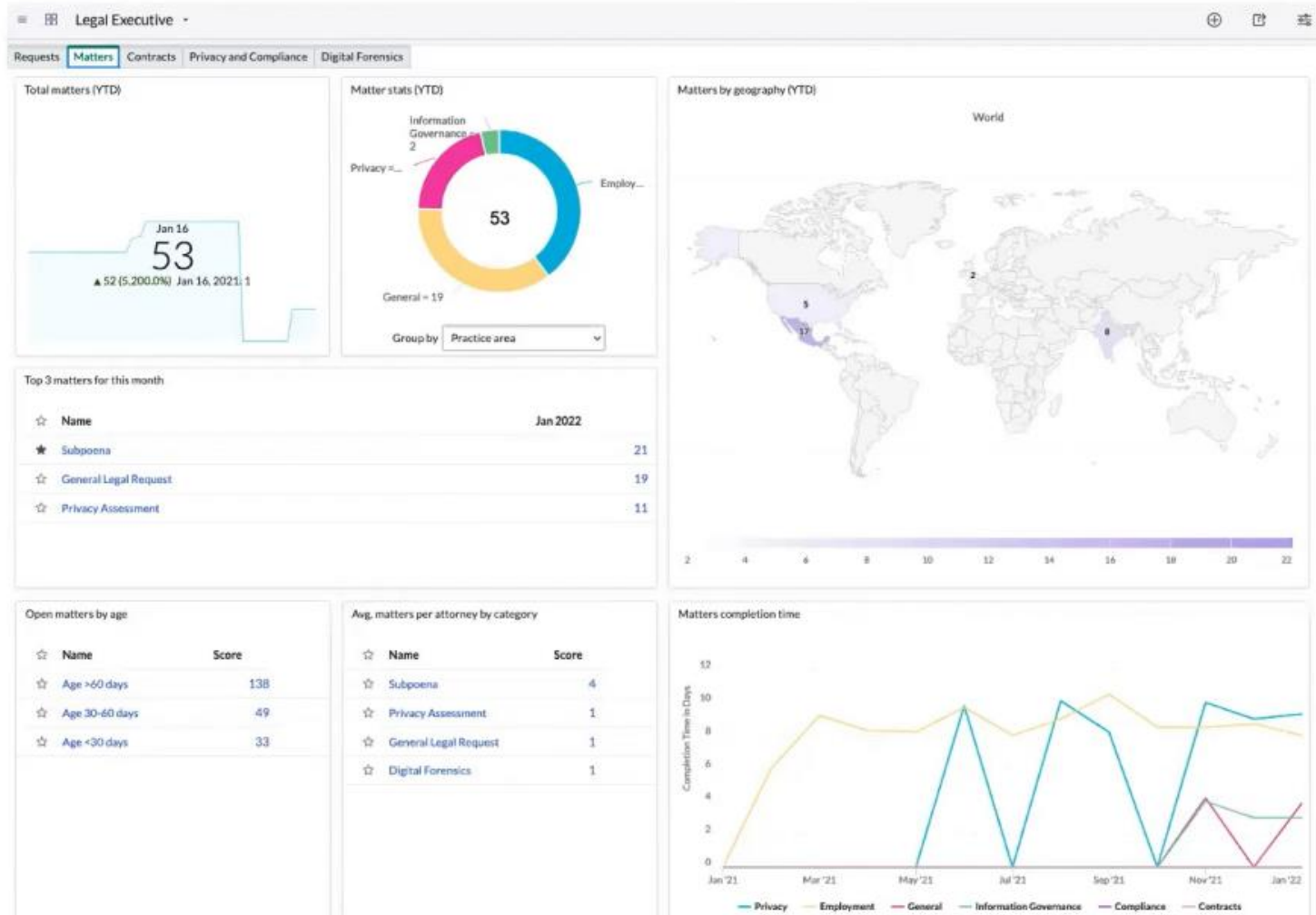
Legal Executive Dashboard

Persona: Legal Executives, Practice Area Leads, General Counsel

Documentation Link

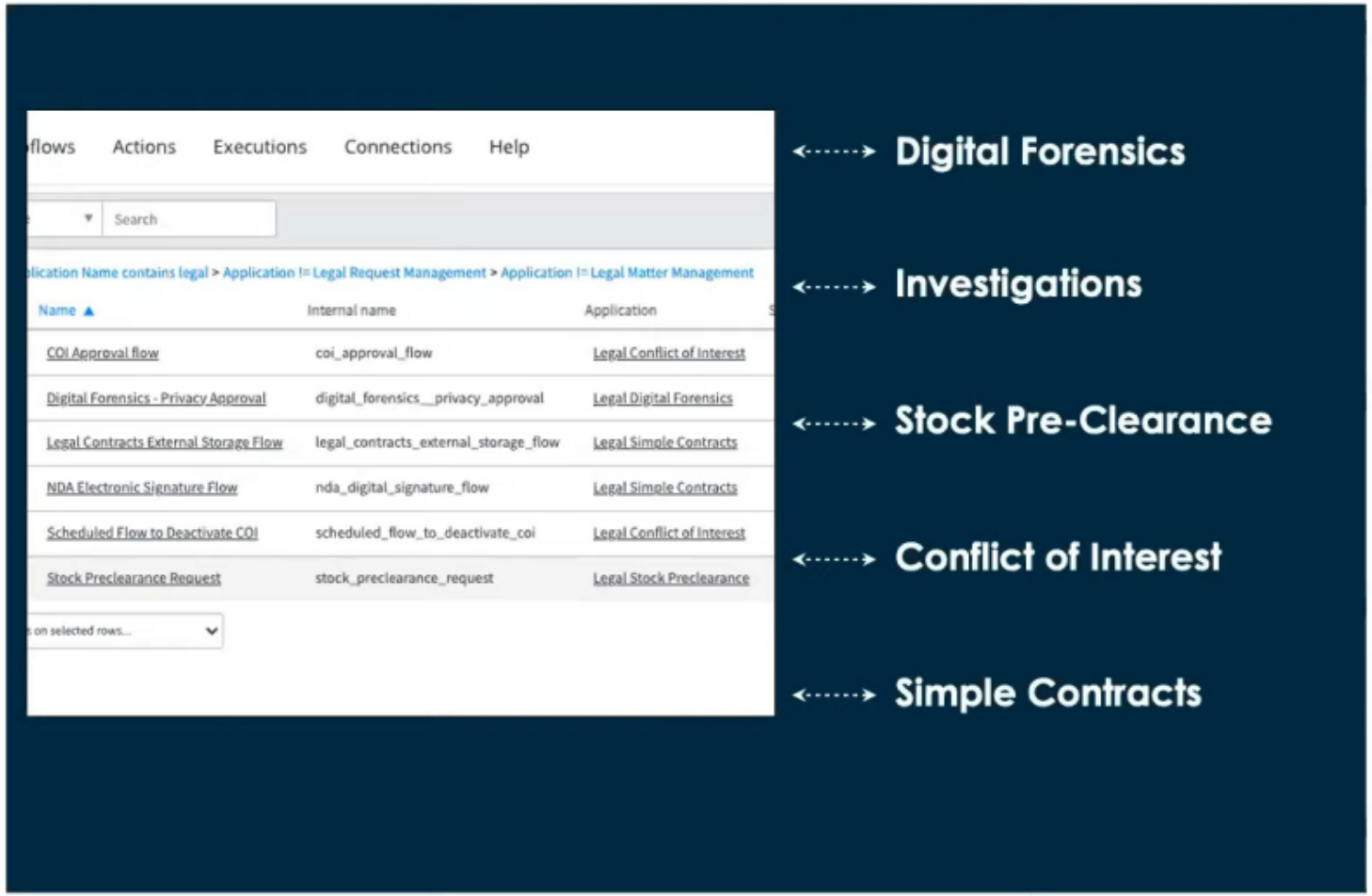
As an executive I can get a birds eye view of the nature and volume work the team is doing and understand the trends related to Legal requests and Legal Matter to make informed business decisions.

Case Study: How ServiceNow transforms its legal operation.



Legal practice apps

Leverage industry expertise to configure and deploy fast



Outcomes

Faster time to value with Industry best practice workflows

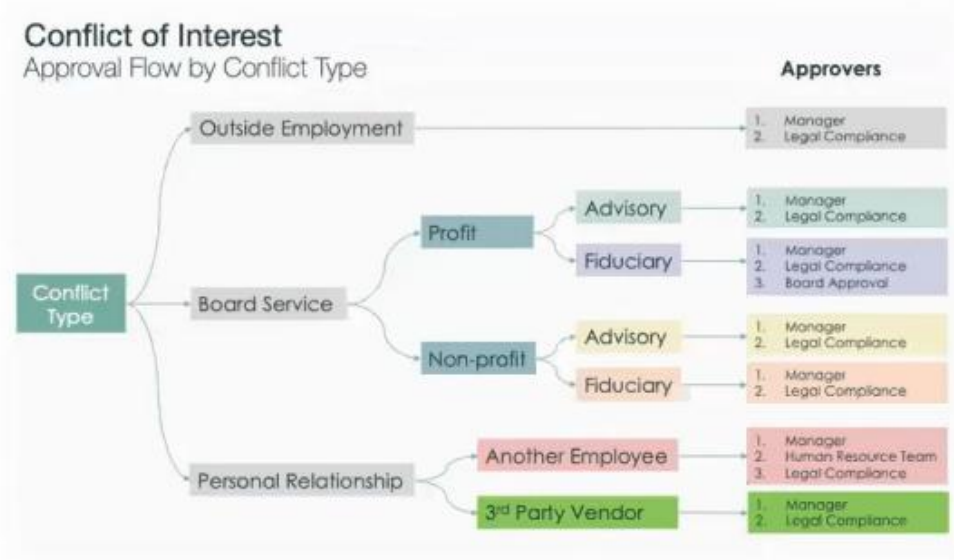
Leverage Now Platform from self-service request to service delivery

Prioritize legal transformation based on real scenarios

Practice Area Apps

Legal Conflict of Interest

Manage the disclosure, approval, and registry of conflict of interest that might arise from employees having competing interests or loyalties.



[Documentation Link]

[NowCreate Deployment Guide]

Practice Area Apps

Legal Digital Forensics

Handle digital forensics requests for data discovery related to custodial and non-custodial data sources that are subject to investigations or litigation.

Key Features

- Intake form to gather request background, custodial and non-custodial data sources with keywords and filter dates.
- Flagging of ***e-discovery data sources*** with instructions for data processing.
- Integrated privacy approval flow to get the required approvals before starting the investigation.
- Pre-defined standard digital forensic tasks using a template.
- Record and audit trail of all activities done in support of the investigation and litigation.

Documentation Link

NowCreate Deployment Guide

Practice Area Apps

Legal Investigations

Enables Legal departments to accept complaints from a simple intake process through multiple channels. The app standardizes the investigations workflow.

Key Features

- Multi-channel intake process including Legal Service Portal, Employee Center portal, and ***Anonymous Report Center (ARC) portal.***
- Option for submitting anonymous or named complaints.
- Pre-configured Intake form
- ***Interview Templates***
- Allegation Types/ Subtypes

For interdepartmental transfer of complaints between Legal and HR departments, see Better together solution: Legal Investigations and HR Service Delivery Employee Relations

Documentation Link

NowCreate Deployment Guide

NowCreate Starter Stories

Practice Area Apps

Legal Simple Contracts

Enables employees to submit legal requests for the creation or review of contracts with third parties, such as vendors, customers, and partners.

Key Features

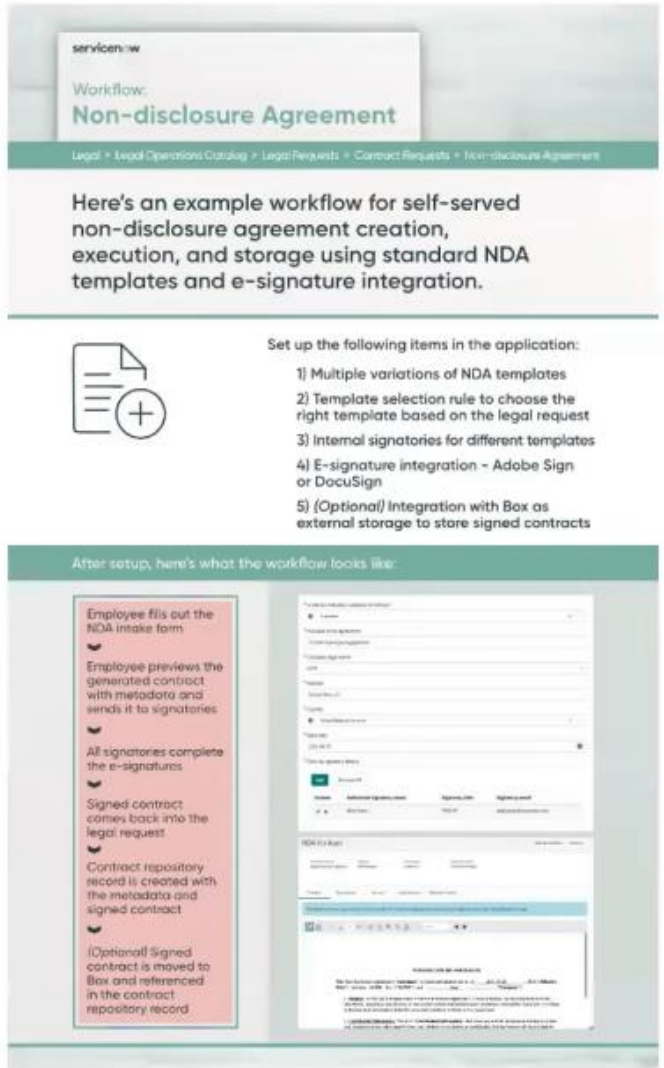
- Document templates for standard contract documents such as Non-disclosure Agreements (NDA). ***Create template blocks to replace text based on conditions in the document templates.***
- ***Integration with Microsoft Dynamics CRM*** to pull sales representatives and associated sales accounts and active opportunities data.
- ***Integration with electronic signature*** providers such as DocuSign and Adobe Sign.
- ***Integration with external storage providers*** such as Box, Google Drive, and Microsoft OneDrive to store final signed contract documents.
- Centralized repository of all signed and signed contract documents.

Practice Area Apps

Legal Simple Contracts

We current support for the following contract requests OOB:

- Non-disclosure agreement requests
- Sales contract review requests
- Third-party contract review requests



Reference List

- Legal Service Delivery Application Video
  - https://www.youtube.com/watch?v=FVzkyUIM5rE&t=1664s&ab_channel=ServiceNowCommunity

- Legal Service Delivery Documentation.
  - https://docs.servicenow.com/bundle/washingtondc-employee-service-management/page/product/legal-request-management/concept/legal-management-overview.html