

Financial Services

Powering **digital transformation** for legal services in banking

BSG drove digital transformation of legal services for a large South African bank by implementing an integrated enabling technology stack, **reducing risk, enhancing data integrity and security** and **ensuring business continuity**.



Overview of the client's needs

- A holistic transformation to improve legal practice management within the group legal and litigation environment
- Drive digital transformation in line with overall business strategy utilising innovative and cloud-based technologies
- Remove dependency on legacy systems by introducing new systems and better processes
- Maximise benefit and return for the client by understanding business needs and prioritisation of work
- Reduce errors stemming from manual processing
- Optimise manual processes through automation



Objectives of the engagement

- Support the legal enterprise automation programme by implementing end-to-end legal practice management
- Analyse and prioritise business needs in line with strategy and future customer and business requirements
- Implement an end-to-end integrated operating platform integrating [Box](#) and [HotDocs](#) - developing customisation solutions as enhancements
- Enable digital storage, tracking and reporting throughout the process lifecycle
- Develop custom solutions as enhancements to Box and HotDocs
- Support data migration and quality improvements bringing legal services in line with governance structures



Benefits of the change

- Cost saving due to migration from costly legacy systems and long term productivity gains as a result of streamlined processes and the use of appropriate technology
- Short term productivity gains due to automation and reduction of manual processing
- Risk reduction as legal now have greater control and a full audit trail over the end-to-end lifecycle of documentation and legal processes
- Greater ability to report and provide insights to business, identifying risks and opportunities associated with legacy technology and poor governance

Driving auditable, accurate, productive and **accountable legal processes** using **innovative digital technology**.

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Engagement Overview

A large South African bank needed to make their application landscape more efficient and remove their organisation-wide dependency on legacy systems within a finite timeframe. As part of this rationalisation and modernisation programme their group legal and litigation environment needed to transform to improve their legal practice management.

Group legal needed to undergo a holistic transformation of technology, processes and governance in line with their overall business strategy and drive towards digital transformation. This needed to be achieved by utilising innovative, cloud-based technologies which would enable auditable, accurate, productive and accountable legal processes.

Legal services within the bank were not optimised, with processes requiring human intervention and the use of a number of technology applications in the workflow. The bank wanted to create an end-to-end integrated system which would automate human processing and ensure data integrity and security through correct governance and central storage.

Solution

The bank sought a trusted partner to optimise manual legal processes through automation and reduce errors stemming from human intervention. With our proven delivery track record, BSG was chosen to partner with the bank on both the strategic and implementation aspects of the legal enterprise automation programme.

Using a combination of analysis, strategy, development and delivery management, BSG supported the bank to implement end-to-end legal practice management that enabled business to streamline processes around product agreements, terms and conditions negotiations, procurement and vendor support.

BSG conducted analysis and prioritisation of business needs in line with business strategy and future customer and business requirements. Based on this, BSG, in collaboration with the bank, developed a roadmap for the implementation of a customer relationship management (CRM) platform plugin, [AdvoLogix](#), which integrates works management and workflow, and documents and contracts lifecycle management capabilities. BSG developed custom solutions as enhancements to this cloud solution, enabling digital storage, tracking and reporting throughout the process lifecycle with Box and HotDocs. BSG also undertook the support of data migration and data quality improvements, bringing group legal services in line with compliance and governance structures.

BSG making a difference

BSG enabled the bank to maximise the benefit of the legal services transformation by understanding business needs and prioritisation of work.

The programme realised short-term productivity gains, as much manual work done by human intervention was automated. It realised long-term cost saving and productivity gains and removed the dependency on legacy systems, by the migration from costly legacy systems to a single, rationalised, new system.

BSG delivered risk reduction as group legal now has greater control over legal services, with a full audit trail over the end-to-end lifecycle of documentation and legal processes. This provided the bank with the improved ability to report and provide insights to business, identifying risks and opportunities proactively.

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