



STREAMLINED TERMS AND CONDITIONS GIVES TIME BACK TO SALES

CHALLENGE

Terms and conditions documentation used by sales to close deals was inconsistent and poorly organized. Most sales deals were closed via a purchase order process that referenced terms and conditions that were outdated and did not meet corporate needs. There was no in-house legal counsel to lead the charge in streamlining documentation. The company contracted with an outside part-time attorney to approve contracts; however, this person's role was limited to contract approval not the development of new documentation. As a part-time external resource, the attorney did not have knowledge of the company's products and services to design legal documentation that would outline the detail of new and existing products to protect the company. Sales teams did not have a standard set of contractual documents to use during sales conversations. Furthermore, the company was launching a variety of new cloud based products that required a different approach for legal documentation. The "new" sales force needed to have a streamlined, easy to understand process that would allow them to mix and match products and secure customer approvals quickly to accelerate the sales pipeline.

ACTIONS

- Surveyed sales teams to uncover all legal documentation currently in use and discovered that there were 20+ documents in use that had overlapping or conflicting legal language.
- Led meetings between sales, professional services team, manufacturing team, and outside counsel to explain new and existing products and services to outside counsel.
- Worked directly with CEO and outside counsel to formulate a strategy for consolidating legal documentation.
- Developed detailed timeline for updating documentation and training sales force on how to use documentation.
- Worked with training team to develop training presentation and material.
- Led sales training sessions and fielded questions from sales regarding documentation.
- Investigated automated approach using Adobe software and Microsoft Dynamics CRM to speed up the approval process between Adtech Global and customers.

RESULTS

- Consolidated 20+ documents into one cohesive 30-page document to meet the needs of four different lines of business.
- Provided first ever learning curriculum for Adtech Global terms and conditions and legal documentation for sales teams.
- Feedback from sales teams indicated that this streamlined process saved each of them several hours per week and helped clients better understand terms and conditions so that they could in turn make decisions with their own legal teams.