

Addleshaw Goddard

See how this global law firm uses HighQ
for contract management, due diligence
and document automation

Addleshaw Goddard has transformed the way they use HighQ's iSheets functionality to win clients, save costs and deliver work in a more streamlined way from small tasks to large deals.

Kerry Westland, TST senior manager at the firm, explains how she and her team have created products within iSheets that are in use by all divisions of the firm, and have been used to win a variety of pitches.

Addleshaw Goddard first started using HighQ for property extranets, making use of the files module to store and securely share property documents.

Starting small with iSheets

Westland and her colleagues in the Transaction Services Team recognized the potential of iSheets as a transactional tool after hearing about how other firms were using it in imaginative ways.

"I read the iSheets and document automation manuals and just started to build things," says Westland. "At first they were really simple. They were tools that help us automate simple, replicable tasks."

One of Westland's earliest iSheet solutions was a company search report. "One of the first iSheets I made halved the time we spent creating a company search report," explains Westland.

The company search iSheet is set up with pre-defined dropdown options and a fixed template, so instead of manually typing or pasting clauses into a template, users select the clauses they need and automatically generate a correctly formatted report.

Westland explains: "This is one job that we repeat all the time and that took quite a bit of time to complete. Now we ensure that it is done in the most

efficient way, with the pre-defined answers ensuring quality and consistency. It really has changed the way we work."

From little tasks to big challenges

Addleshaw Goddard's use of iSheets has evolved dramatically from those early days. Westland and her team of technology paralegals have now created numerous iSheets solutions for clients and different divisions of the business.

"As well as for the smaller, repeatable tasks—we also build iSheets for really big tasks that take months and involve several parties," says Westland.

Addleshaw Goddard is currently coordinating the transfer of thousands of properties from one entity to another as part of a sale of a FTSE 100 company.

"This is the biggest deal we've used iSheets for to date," says Westland. "We built a solution that allows all parties involved in the deal to access documentation associated with the transfer of the properties. It has taken a couple of months to develop and at the moment it contains 1,600 questions."

Working with multiple parties meant that Westland and her team had to think carefully about how they created this iSheet. "We've got the client, surveyors, other law firms and other third parties contributing, with around 200 users in total, so we set up a workflow to make sure they access it in the right order."



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- Kerry Westland, TST Senior Manager, Addleshaw Goddard

The workflow automatically alerts parties when it is their turn to complete their section. “The surveyors upload their documents as files and fill in their part of the iSheet. Once this is completed, the firms are alerted to review information from the surveyors and then complete their section, then the client is alerted to fill out their section of the form.”

“Once this is done, the firms are notified again so they can use the data in the iSheet to automate the creation of a variety of documents including certificates of title and land registry forms,” says Westland.

Another benefit of the workflow is that the client has greater visibility over the deal, explains Westland. “The client can log in at any time and see what stage we’re at in the workflow through data visualization that we have developed, in conjunction with our IT department, for our instance of Collaborate.”

The solution has made a huge difference to how this deal is run. “Part of the reason for winning the pitch was based on our use of Collaborate” Westland states. “Before iSheets we would have used spreadsheets to gather the data and would have manually created all of the documents. This solution has saved us a lot of time, and will ensure the client saves on fees.”

A flexible solution

Westland enjoys being experimental with the breadth of possibilities available in iSheets. “We can use it in so many different ways,” she says. “We’re working on a deal with a blue-chip organization for a large-scale due diligence deal using iSheets. It’s so much more efficient and consistent than reviewing each document and typing out the findings manually. It enables us to automate progress reports too.”

“We’re also using it for litigation and matter management,” Westland explains. “Say we’re handling a debt recovery claim: the client comes on to the system, uploads their documents into the matter folder in the files module. We then upload this to iSheets with key dates for the matter.”

“We can automate all the letters and documents needed for litigation. Once you’ve filled in the defendant’s name once, you don’t need to do it again. We can include key dates such as deadlines for responses, and we can run reports to show what’s overdue or what responses we’ve received. We also set up email alerts to inform users of deadlines approaching.”

“What’s key here is that the client has real-time access for what they need to have access to, with all correspondence and information available in one place,” Westland explains. “It also enables us to report on this data and spot trends for the client. We can identify possible sticking points and offer suggestions to prevent future claims.”

Changing the way the firm operates

Westland is thrilled with how well iSheets has caught on at Addleshaw Goddard. “The interest within the firm is amazing,” she says. “People across the firm are telling other people that they should use Collaborate in their pitches. Our clients really like it too.”

“Our lawyers are thinking differently,” Westland explains. “They’re looking at iSheets as legal products that they can sell to clients as transactional solutions. We now have partners demoing Collaborate in pitches.”

Kerry and her team have big plans for the future. “There are exciting times ahead, and the firm is really looking forward to trying new things.”



About Addleshaw Goddard

Addleshaw Goddard (addleshawgoddard.com) is a premium business law firm offering an exceptional breadth of services. The firm's approach combines a deep understanding of clients businesses, markets and sectors with high calibre expertise, straight talking advice and a collaborative team culture. It has offices in London, Leeds, Manchester, Dubai, Oman, Qatar, Singapore and Hong Kong. It is a leading advisor to FTSE100 companies, and a market leader across the firm's operating divisions, as well as in its chosen sectors: digital, financial services, energy and utilities, health, industrials, retail and consumer, real estate and transport.

About HighQ

HighQ provides innovative enterprise collaboration and content management solutions to the world's leading law firms, financial services companies, governments and corporations. The company's client base includes over 50% of the global top 100 law firms and some of the largest global financial institutions. HighQ combines secure, enterprise-grade technology with an amazing client experience to transform the way businesses collaborate, communicate and share information.

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