OUTLAW

by Filevine

Customer Case Study
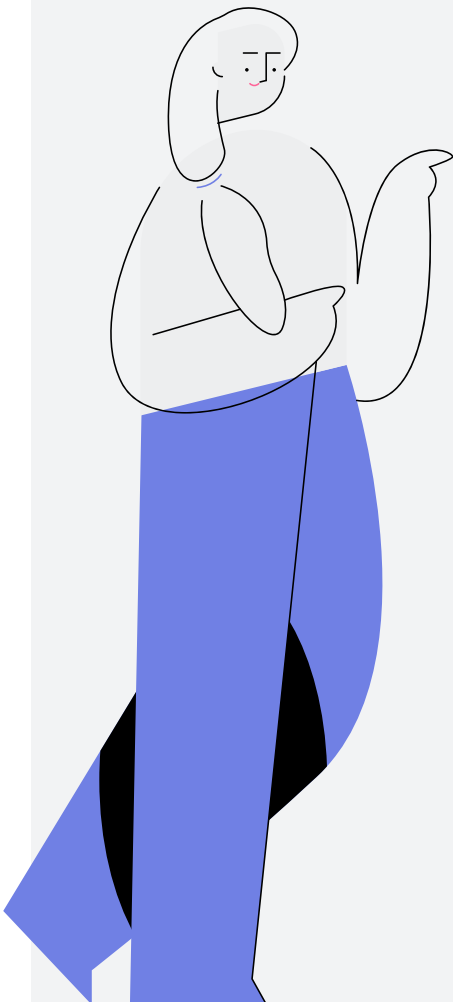
"Outlaw's featured set of solutions help by speeding up workflows and handling high volume documents."

Outlaw enables accounting team of 8,000 to manage high volume contracts at scale.

The Challenge

Saving time and maximizing employee efficiency is critical for a top national audit, tax and professional service firm. The firm's large tax team contains hundreds of account executives (AEs) who each have a book of business from 15-500 clients — this equates to tens of thousands of documents to track and process annually, all with unique workflows.

Sending a myriad of client-ready contracts (with an internal review option) in as few steps as possible is crucial, particularly during Q4 as the firm works to shore up repeat tax clients for the upcoming year.

*"Getting **tens of thousands** of client-ready Statements of Work out the door in **as few processing steps as possible** is the name of the game."*

Solution Wishlist

✓ **Quickly identify signed and missing documents, contracts** due for renewal, and create client-ready docs with different workflows

✓ **Apply conditional triggers** for different sections and minor client-specific edits to a high volume of renewal contracts

✓ **Improve productivity** through mass, streamlined task completion

✓ **Silo the tax team's unique volume** into a pipeline separate from other departments

Simple Management of Multiple Workflows

At the firm, statements of work (SOW) are renewed annually while master service agreements (MSA) expire every five years. Outlaw helps the team by tracking the lifecycle and status of each client's contracts. The AEs can see if the contracts have been signed and track which clients need a new MSA or SOW. Additionally, Outlaw helps the team proactively prep by informing them which clients are due for renewal at the beginning of each cycle.

Onboarding first-time clients who need to sign a SOW and MSA together is simplified with the bundling template. Bundling enables the AEs to send both documents in a single digital envelope. Signees can open and access all the documents they need to sign in one sitting in one simple platform, ensuring they are not slowed down by multiple contract flows or multiple emails.

Easy Editing

Once AEs have identified contracts in need of renewal, they can quickly edit contract data points based on the previous year's terms, such as year and end date. This gets the documents in clients' hands sooner than ever before.

When needed, AEs can also share edited agreements internally for approval on redlines or updates on language, pricing, etc.

*"Account executives' ability to make **simple edits themselves** and route for approval puts the firm's **management process lightyears ahead** of where it was."*

Batch Generation

The batch generation feature of Outlaw saves AEs time by enabling them to produce new contracts by carrying over metadata from the prior year's document. This means data from previous years can be carried over to process the current year even quicker. AEs are as "team members" to their contracts, giving them the ability to pull up a personal queue of tasks which eases the renewal workload.

Intentional Isolation

Outlaw enables the firm to create a "team" for each division that can then manage its own templates and users. This "team" function is especially helpful for the firm's largest department — Tax — because it helps them appropriately silo volume flow from other divisions during the team's peak workload time in Q4.

The Outcome

Outlaw empowers the firm's tax team to efficiently manage multiple workflows and accurately edit, send, and sign new contracts, seamlessly.

Within each team, Outlaw offers a streamlined, personal pipeline for each AE. The automated process, like uploading previous years' metadata, frees up time for the team to focus more on building personal relationships with their clients.

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