



Sage Automation Case Study

Emma Christie
General Counsel





About SAGE Group and Emma Christie, General Counsel

SAGE is a global group with a team of more than 700 people across two continents and 18 offices. SAGE is committed to making the world smarter, safer and more sustainable through digitization and technology transformation.

The SAGE team enables their clients to innovate, modernise, digitise, and improve how they do things by solving complex technology and process-focused challenges to improve efficiency, safety, cost-savings, quality and performance in areas such as industrial operations automation, data-driven business transformation and digital strategy.

Sage Automation's General Counsel, Emma Christie, has been with the organization for 8 fast-paced years of growth, providing strategic and commercial advice to the five businesses within the SAGE Group, with a focus on the main business, SAGE Automation, an industrial automation business that manages critical infrastructure.

Emma says, "It's a combination of an engineering business and a manufacturing assembly-type business, plus a service technician business, providing a broad range of services. Then we have Nukon, which is more of a software company. Skills Lab is a registered training organization, Embedded Expertise is a specialist labor hire business, mainly placing people like project managers and engineers. Then we have a couple of other businesses that have some products that fit in with the type of other work we do with SAGE Automation. It's a diverse business, focusing on process automation, making systems and businesses more efficient.

We've been on a really big growth trajectory in the last five years. We've doubled in size. The strategy for the business is to grow sustainably and internationally.

I lead a team of three in the role of General Counsel, with two mid-career lawyers. We're going through a change again now, so I am recruiting. We are potentially looking at bringing in either a graduate-level lawyer or a paralegal to help with some of the more day-to-day general work.

Managing matters in a central location

Dazychain has been a game changer for me, with the main benefits resulting from having a central location where everything is stored. Whether it's just somebody's on leave or staff changes, we can easily find what the staff member has been working on and pick it up. Dazychain saves a huge amount of time in terms of trying to pick up other people's work for various reasons. It's made our processes a lot more efficient, because some of the work we do can be repetitive. Now we can search historically to find an identical or similar matter.

Work allocation

Dazychain also helped with work allocation. Because we don't have a junior staff member, we all need visibility on intake matters. I don't allocate the work, I let people take what they want to take, but then I've always got that visibility on how much is still waiting to be allocated, and the current team members' workloads. Because we have some part-time workers, if someone's not here and a query comes up, another person

can quickly check the status of a matter and potentially hold it over until the other person returns to work. It saves so much time.

Locating things quickly has had a big effect on us. We can go back and say, "We've done this before," it might be a quick comparison job instead of a whole 'reinventing-the-wheel' type scenario. It's hard to quantify, because across the team it's variable, but we probably save at least 20 hours a month.

Creating deliverables on a matter

The other thing that's been a game changer in Dazychain is the deliverables. When we have a contract we use the deliverables function to tell us that it's due to expire or that there's an opportunity for a rate review or price review. That's been fantastic, because we've never had that information centralized across the business.

Internal clients reap the benefits. A contract might not technically be our responsibility, but in the past, if the person who's responsible for that contract had left, or hadn't set it up, some contracts were sliding under the radar. When we add the contract in Dazychain it only takes a minute to add in a deliverable with a due date as a safety net for our business leaders.



Strategic reporting with Dazychain

I report to the board on the types of work we're managing, by businesses, and also at the state level. I also report on risk classification. Anything that's classified as high risk we report to the board to say, "Based on this dashboard, this number of contracts are in the high-risk category for this reason," and the board loves it.

The board suddenly has visibility where they didn't before. There was a lot of interest in our reports and some tasks that came out of it from a board perspective. So, they are really happy with that functionality.

The reporting has definitely helped in terms of justifying our resourcing allocations. In a lot of businesses, the legal function internally is a cost center, it's not generating revenue. Many businesses go through phases where they talk about either cutting costs or not increasing costs. Having that visibility to say, "We are managing approximately 60 contracts a month that have come in for review," is the sort of information they've never had before. That was a real-eye-opener for our business leaders. It also enables me to put a business case towards getting extra support. We had a gut feeling that we were busy, but seeing it

in the dashboard reporting, we were all a bit shocked about the number. The other thing is now after a year there are recognizable patterns and it's pretty consistent. We have a drop in January and a peak in June, but we can also see that it's consistent. So it's not just a short term. We can say, "Okay, this isn't just a busy phase, we're trending."

It's also prompted us to start thinking about how we can operate more efficiently. There's a body of work in the broader business considering if too much is coming to the Leal Team and if there might be a better way of triaging or gate-keeping before it gets to the legal team. So, instead of saying the answer isn't always, more resources, more resources, it's about considering smarter ways of working. Instead of someone saying, "Just send it to Legal, get it off my desk, make it someone else's problem," is it something that really needs to go to Legal? Is there someone else? Is there a commercial function who could look at it?

Change management

Dazychain is really easy to implement. I'm not technologically advanced at all. I need things to be easy to use, and I've found it very, very easy to use, with staff changes and new people coming in they're picking it up very quickly. We're really happy. So, I would definitely recommend it.





Advice for other teams on the matter management journey

You need to ask yourself what you are trying to achieve. And for us, the big two were having that visibility on what's coming in and collecting work coming into one central location. The legal matter intake form was such a game changer for us with all matters being created automatically in Dazychain with all of the associated documents, emails and briefing information, instead of someone contacting one person and then contacting someone else about the same thing.

We were told we might have trouble getting people to use it. We have had no problem at all. Our people embraced it immediately. But our workforce is tech-focused, adaptable and is used to change.

Achieving visibility over what people in the team are doing as a manager and a team member brings a sense of control when some people are part-time and others are away. You don't have to wait until someone is back or disturb another team member. It's all there in one location. If you need to centralize your matters into one easy location, it's amazing.

I think also the Dazychain integration with DocuSign has been really great for us too, because it's seamless. You can send things directly from Dazychain to DocuSign and it comes back to the original matter when it's signed by all of the signatories.

There's a lot of functionality in Dazychain, and even if you're not using all of it, just using some of it can be a real game changer. Don't be overwhelmed by it. But using the bits we're using has made a significant difference. So, don't be overwhelmed by everything, even if you just use a small part of the platform to begin with.

The Dazychain team

The Dazychain team is fantastic. Whenever we've had an issue, which is usually a user issue at our end rather than anything else, the team has supported us very quickly. Their response time was much faster than expected and they're always happy to help out, and when we've had some feedback for improving the system, the Dazychain team took it on board.