Automation transforms KPMG LLP’s core legal intake process

This transformation demonstrates the power of our ServiceNow alliance as we together transform our internal organizations.

Sean Barrins, Managing Director, US ServiceNow Alliance, KPMG LLP

Trust in a benchmark global brand

KPMG LLP (KPMG) is the US firm of the KPMG global organization of independent professional services firms. In the US, KPMG employs more than 40,000 people located in all 50 states, delivering audit, tax, and advisory services, generating almost $10 billion in revenues – around one third of KPMG’s total global earnings.

Businesses trust KPMG. When they commission KPMG, they engage leading professionals who represent the expertise, strength, reputation, and infrastructure of a benchmark global brand.
Delivering on the KPMG client promise means serving up a great experience before the work even begins – moving quickly and with confidence to put the necessary contract terms and conditions in place that enable its teams to begin work at pace. Equally, KPMG needs this core documentation to manage risk, estimate income, allocate resources, and provide clarity of purpose and responsibilities.

But the firm’s contract review application and documentation production process was slower than it liked and disconnected, often requiring its fee-earning practitioners to spend valuable time on low-value administrative tasks and chasing progress.

“The legacy system for contract reviews had some built-in request workflow, but in reality, much of the process still relied on email, phone calls, and spreadsheet reporting – and maybe a chat or two,” explains Marisa Benson, Advisory Director, KPMG LLP.

“Products at every step
KPMG wished to modernize its contract review processes and create a more agile, streamlined, and always-accessible digital system that enabled self-service and delivered speed, visibility, and efficiency at every step of the process.

ServiceNow is one of the firm’s core enterprise platforms and the Office of General Counsel (OGC) selected ServiceNow Legal Service Delivery to automate a significant portion of their contract review process and legal consultation workflows.

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Farah Remtulla, Principal, KPMG LLP

“The older system was at its limit with a support license about to run out. The overall experience was suboptimal for everyone involved and trying to get documentation finalized and out of the door could be very stressful.”

Risk management professionals also play a large role in contract reviews, so any new system must allow the Office of General Counsel to collaborate with risk professionals and engagement teams within the firm’s three practice areas – audit, advisory, and tax. It is not uncommon for a single review to involve multiple teams and ongoing contributions from colleagues across the firm.

For all of these reasons it was time for a change. KPMG would embrace a more strategic, centralized approach to contract reviews and bring disparate component parts into a unified, focused platform.

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The goal was to deliver a consistent, fast, secure, and consumer-grade user experience for all stakeholders, unlocking speed, efficiency, transparency, and productivity benefits – enabling the legal team to spend their valuable time on more high-value activities.

Fortunately, the Now Platform Rome release in September 2021, including hundreds of new features that accelerate innovation and agile working, enabled KPMG to lift its aspirations from the creation of a simple custom app to a comprehensive, more transformational, out-of-the-box solution.

“We worked hard with colleagues throughout the firm to build a common understanding of everyone’s requirements, and alignment around ServiceNow as a core platform: a system of engagement upon which contract reviews and legal consultations would be managed,” explains Farah Remtulla, Principal, KPMG LLP.

“The legal profession has seen many new IT systems come and go for decades and many of them haven’t delivered. It was important not to over promise. So, we committed to serious engagement with diverse stakeholders from across the firm – focusing on OGC and risk management professionals who would be central to all aspects of the journey, involved in decision-making and testing, fundamental members of the team, and with us all the way.”

Great conversations deliver shared confidence

The project directors and executive leadership were determined that agile principles should apply to both the intelligence gathering process and the solution build, with iterations throughout, constantly refining and adding additional context and detail.

Weekly sessions were maintained over a six-month period, with a strong emphasis on listening and paying serious attention to each stakeholder’s pain points and aspirations – until there was a shared confidence to proceed to the next stage.

“The focus of the implementation was on the experience of those who were requesting the contract reviews,” recalls Marisa.

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Marisa Benson, Director, KPMG Advisory
“But even so, we opened the door to some great conversations about process improvements within OGC and, in the end, we think this has laid the foundation for work that may, in time, become transformational.”

At the heart of the new system is a self-service portal with a set of legal intake forms that enable a faster and more efficient experience. For example, integrating with the KPMG data warehouse self-populated client information has saved time for requesters who no longer had to enter simple things like client email addresses and phone numbers.

Other changes are directly benefiting OGC – transparency into legal staff workloads and insight into key performance indicators hold promise for resourcing legal assignments. Of course, most legal consultations require a high level of platform security that allows for the required levels of confidentiality. After working through a rigorous internal risk review, KPMG agreed that ServiceNow Legal Service Delivery could provide this level of security for contract reviews and legal consultations.

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**Data triggers targeted interventions**

KPMG now has access to rich data, with live dashboards enabling monitoring of the review process and where each document is on its approval journey and who is responsible for the next action, triggering targeted interventions where necessary.

“During the project, ServiceNow provided access into its product development roadmap,” adds Marisa. “Its principal technical consultant was heavily involved in our implementation process to ensure that we knew what’s coming down the line and how we should prepare, which has been especially important as we are an early adopter of the Legal Service Delivery solution.”

“And then, building on these foundations,” says Farah, “the next exciting piece of the puzzle is integrating other components of the Now Platform. This is an exemplar project, providing a launch pad for us to automate countless other employee workflows throughout the firm.”

Lastly, Sean Barrins, Managing Director, US ServiceNow Alliance sums up the impact of this transformative program, “This transformation demonstrates the power of our ServiceNow alliance as we together transform our internal organizations and then bring robust solutions like this to our clients – enabling them to create a resilient enterprise and build trust with their stakeholders.”

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