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Transforming the legal review process for agile teams

BLUEFACE

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CEDTL

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Challenge: Resource Drain

Collecting screens for legal review is a burden on developers, content strategists, and team leaders.

Man-hours spent on most recent review:

66 hours of content strategist's time, chasing slides, explaining needs, waiting for help, reviewing screenshots, requesting replacement screenshots, assembling document, annotating document, updating legal SME, shepherding revisions, running QA, etc.

18 hours of developers' time

About ~6 hours of various other people's time

16 hours of legal team's time

Current cost per annum: $576,000

Cost: ~$12,000 per review per team

Frequency: ~Monthly

Number of teams: Currently 4, soon to be 25

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Challenge: Time to Market

The legal team struggles to understand the context of each flow. Their **confusion leads to wasted time** as they try to understand the logic of the screens. They ask questions about functions beyond the scope of legal review, but they don't know their questions are unnecessary until they ask.

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Challenge: Scalability Constraints

The most recent review was exceptionally large. However, we are iterative, and we can expect that future reviews will occasionally be as large.

We’re not the only CEDTL team striving to work better with the legal team. **The other journeys that are already here and the ones coming on board in upcoming quarters will all experience the same issues as we do.**

We should address this now because it’s not going to get better on its own.

Solution: Buy or Build a Better Way

A flowchart that lets users attach files to decision points would help the legal team understand context. Workflow functions would automate the feedback process.

Buy

Only one product could be found that allows attachments. Edraw Flowchart Maker is $2450 for a perpetual license for 50 users. This product would speed time to market, but since it lacks workflow automation or other advanced features, it doesn't solve our triad of troubles.

Build

The alternative is to build a system that serves our unique needs now and in the future.

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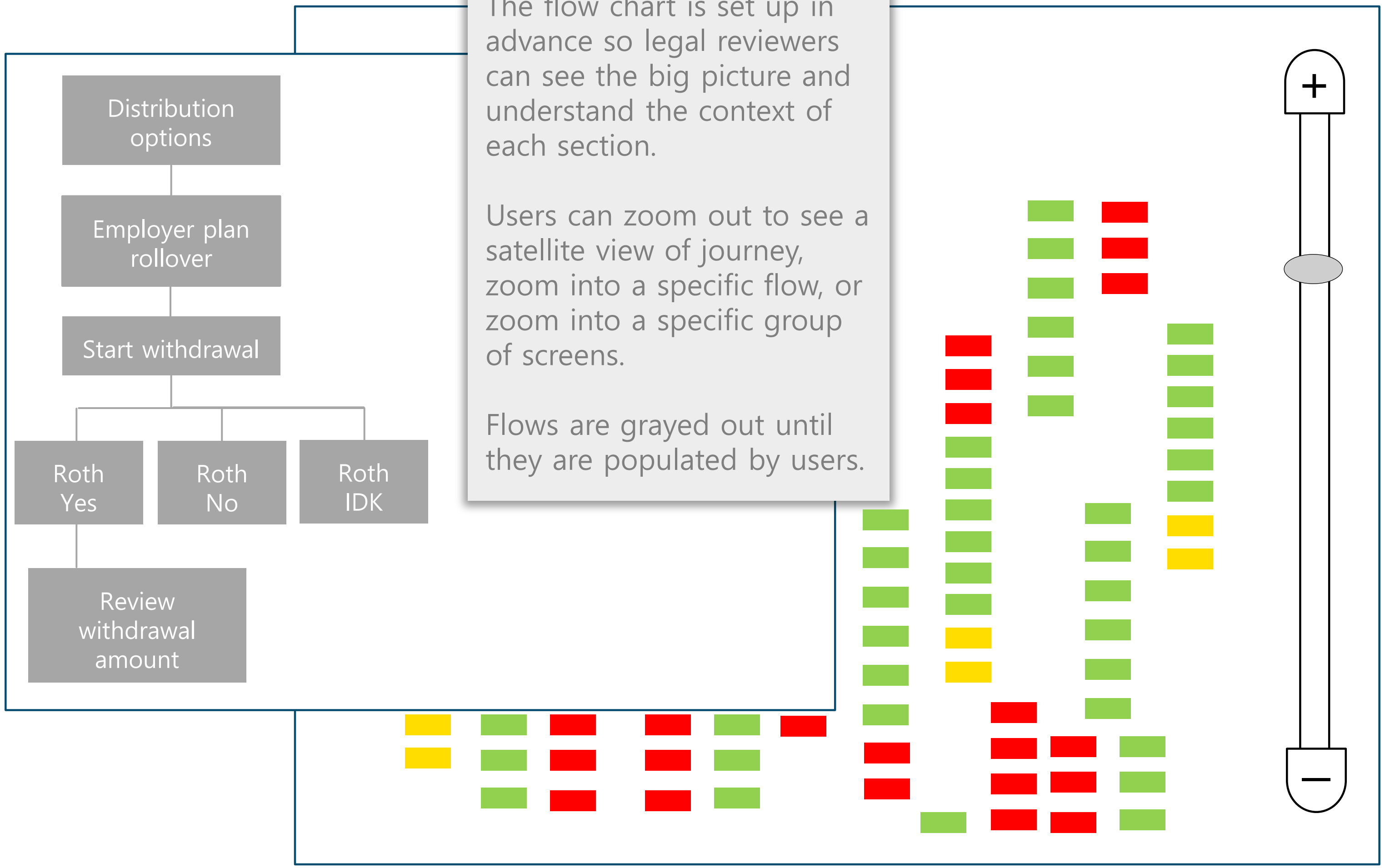
Solution: BlueFace

BlueFace is a system designed to work in both the unique environment of the lab and the traditional environment of the legal review team.

BlueFace Benefits

- Stakeholders can provide input and become involved with the dev process so they have a sense of ownership and a desire for the product to succeed
- The system can be accessed via TRP's SSO system for ease and a good CX for the legal team
- Built-in features can introduce Legal to some digital services (risk categorization, pre-approved content) so they are somewhat more prepared when the digital transformation reaches their department. That's good for T. Rowe Price overall.

Front End: Overview



The flow chart is set up in advance so legal reviewers can see the big picture and understand the context of each section.

Users can zoom out to see a satellite view of journey, zoom into a specific flow, or zoom into a specific group of screens.

Flows are grayed out until they are populated by users.

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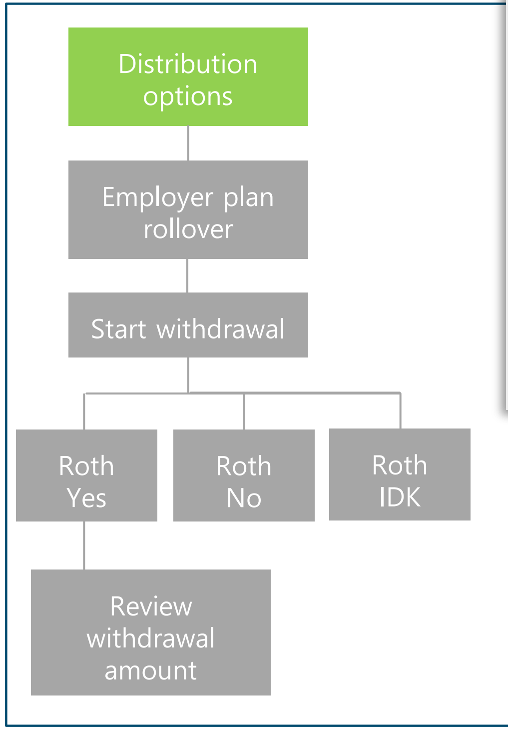
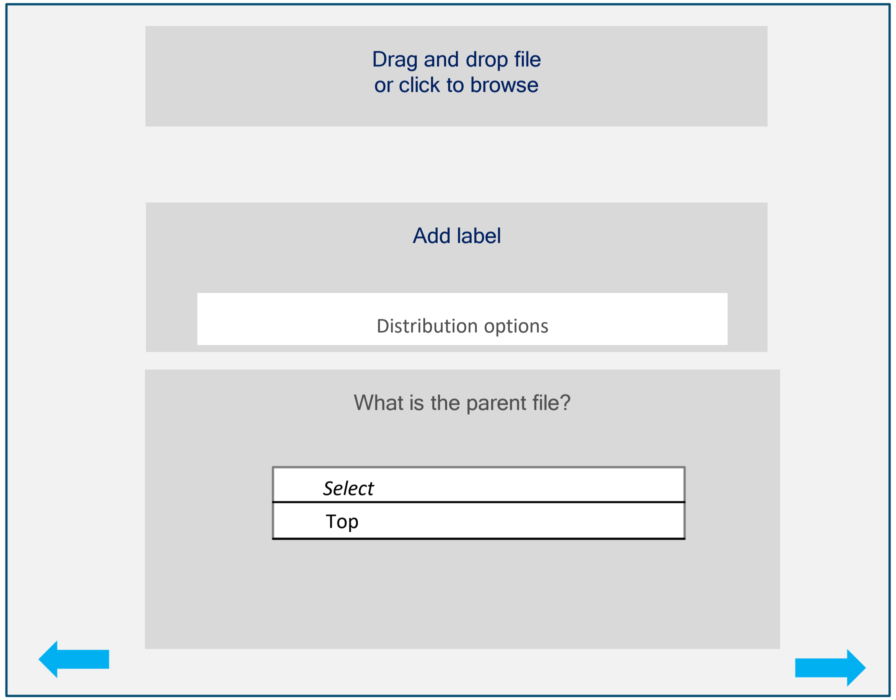
Front End: Ready for review



When a user uploads a screen, it is ready for review. Its label in the flow chart and all lines leading to that label turn green.

Here, the *Distribution options* screen has been uploaded and is ready for review. No other screens have been loaded.

CEDTL Back End: Adding screenshots



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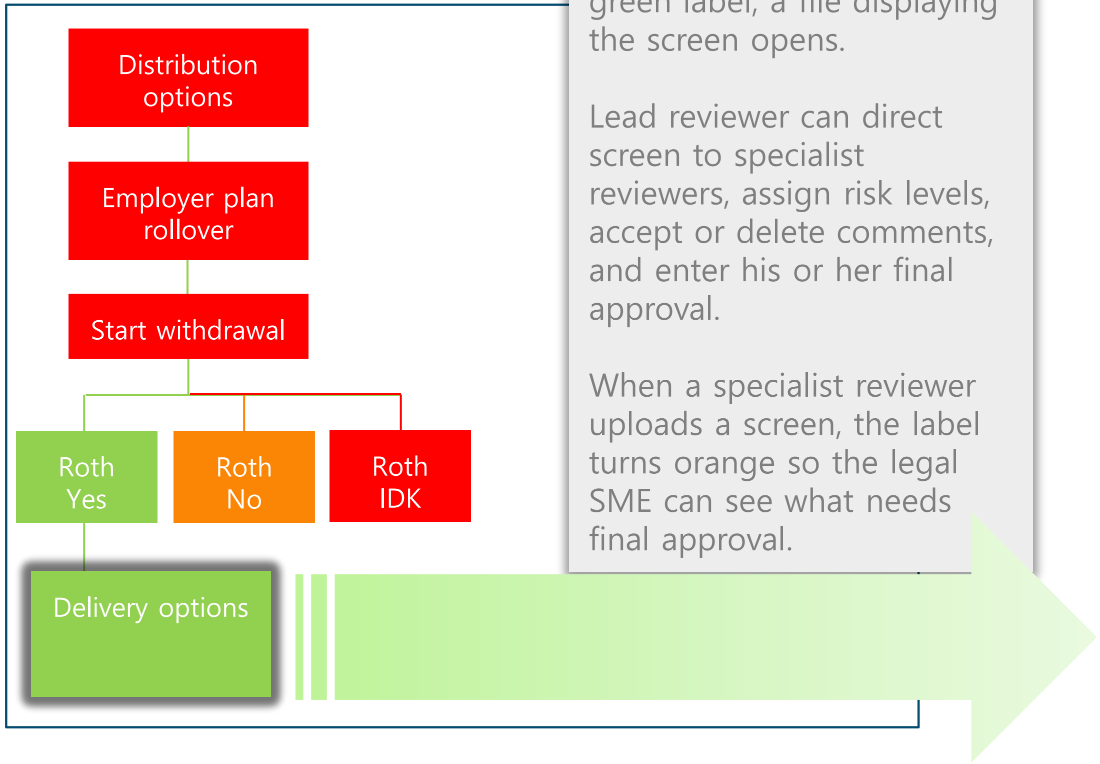
Front End: Review workflow

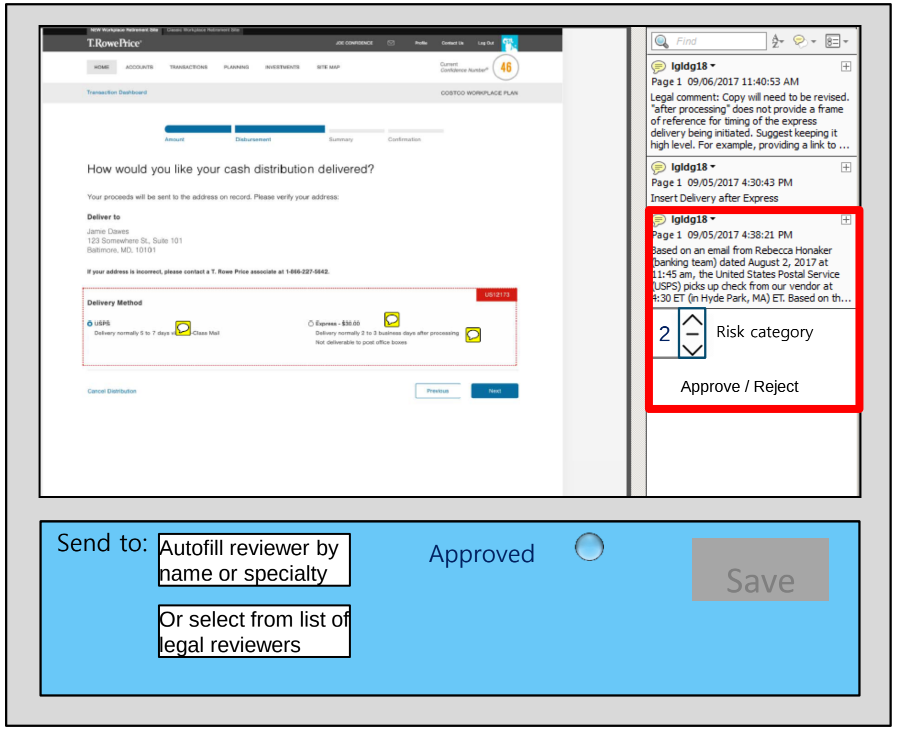


When a reviewer clicks on a green label, a file displaying the screen opens.

Lead reviewer can direct screen to specialist reviewers, assign risk levels, accept or delete comments, and enter his or her final approval.

When a specialist reviewer uploads a screen, the label turns orange so the legal SME can see what needs final approval.

Legal Team Back End: Comment features



Comments enabled

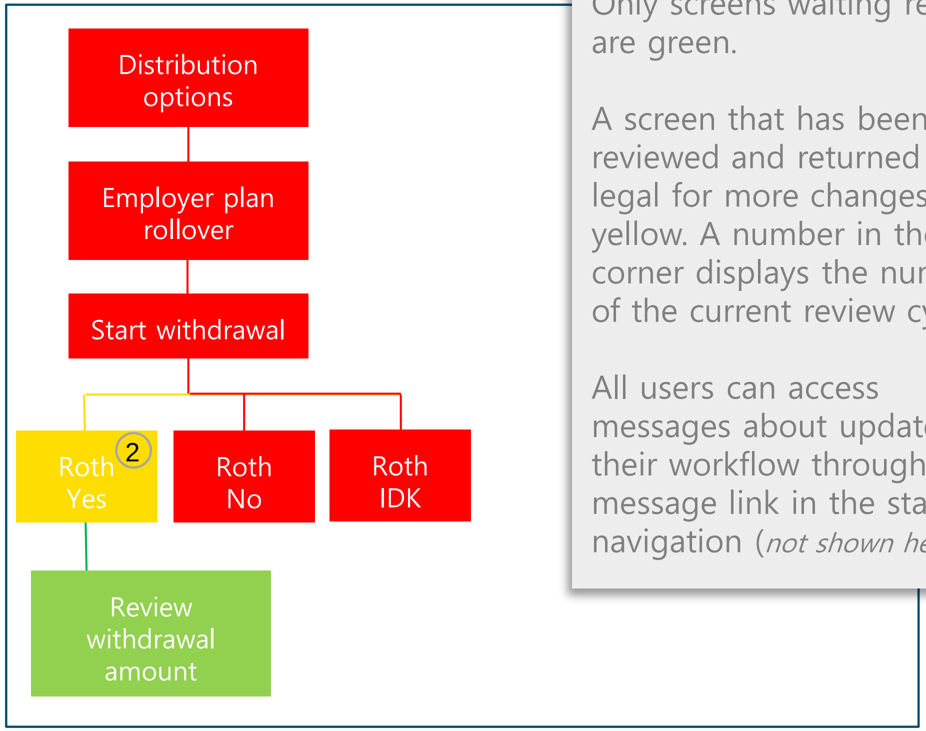
Searchable

Risk assignment

Legal admin can approve/delete comments

1-person sign-off for single source of truth

Front End: Review workflow



After review, labels turn red. Only screens waiting review are green.

A screen that has been reviewed and returned by legal for more changes is yellow. A number in the corner displays the number of the current review cycle.

All users can access messages about updates to their workflow through a message link in the static navigation (*not shown here*).

The Trials & Tribulations of Collation

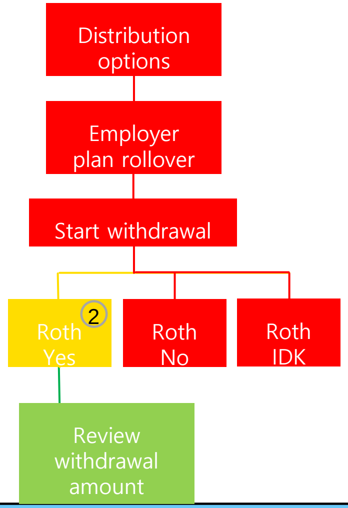
While most people would assume that negotiating details with legal is the hardest part of the legal review process, the real friction occurs in the collection and collation of screenshots. Managing screenshots is:

- Time-consuming
- An error-prone process
- Difficult to govern over multiple revisions

Legal review is not the only reason we collect screenshots. We also share them with the TRP proofreading team and use them ourselves to identify gaps and redundancies in our flows.

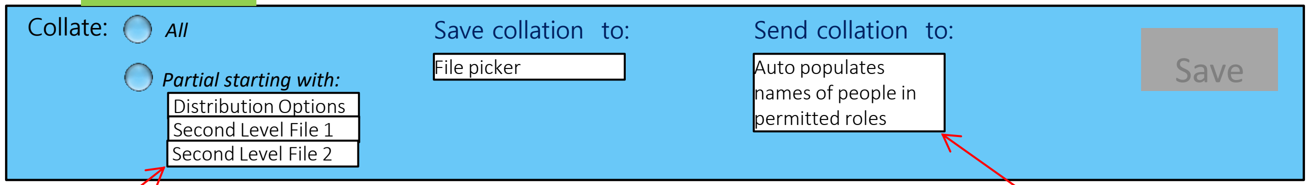
We need an easy way to create screenshot collections that we can use with confidence.

CEDTL Back End: Collation features



Admin can edit flows by clicking on a square, dragging it, clicking inside to edit title, right-clicking to delete, etc.

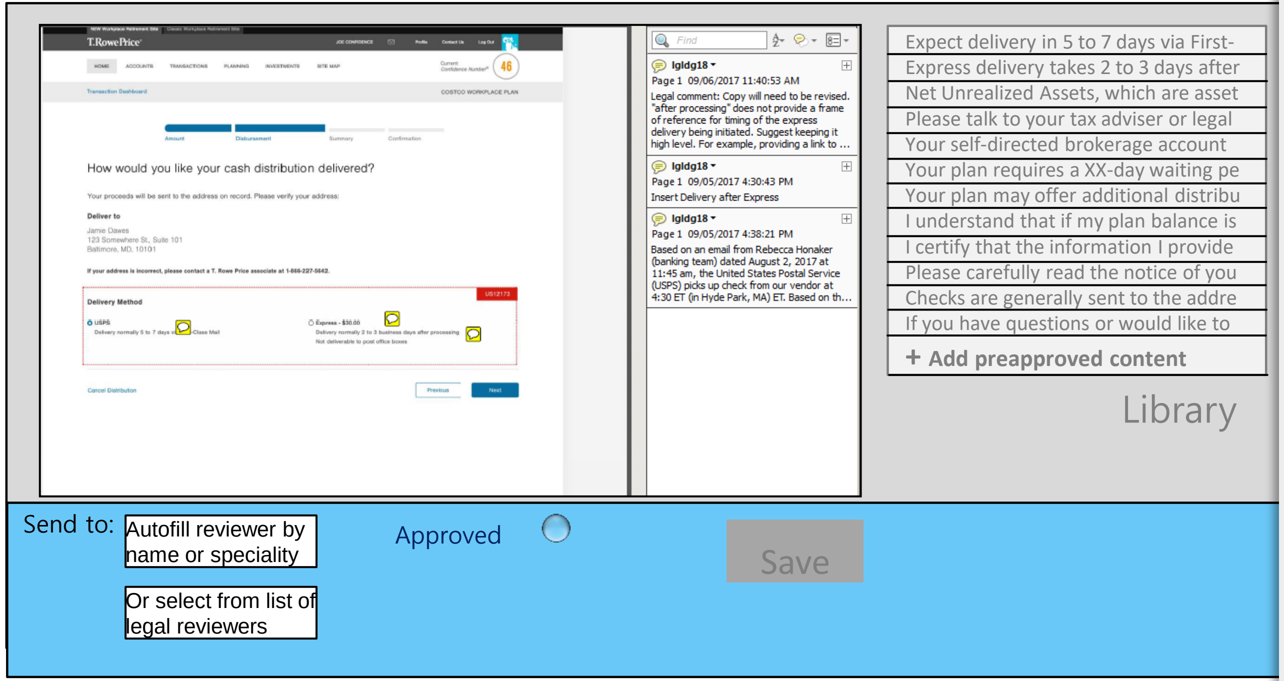
Admin can also manually change the colors of squares to force them back to an earlier stage (i.e., turn a revised red square into a green review square).



Top and 2nd levels display first. When a second level file is selected, the widget expands to display files in the level below that file—ad infinitum.

Authorized users in legal, proofreading, journey, etc. User permissions managed by admin.

Pre-Approved Content Library: Overview



We re-use some small pieces of content regularly.

- Content strategists struggle to ensure consistency
- Legal team wastes time checking same phrases repeatedly

A library of pre-approved content will resolve those issues and drive:

- Consistency across journeys
- Knowledge transfer from legal to content strategists
- A faster legal review process.

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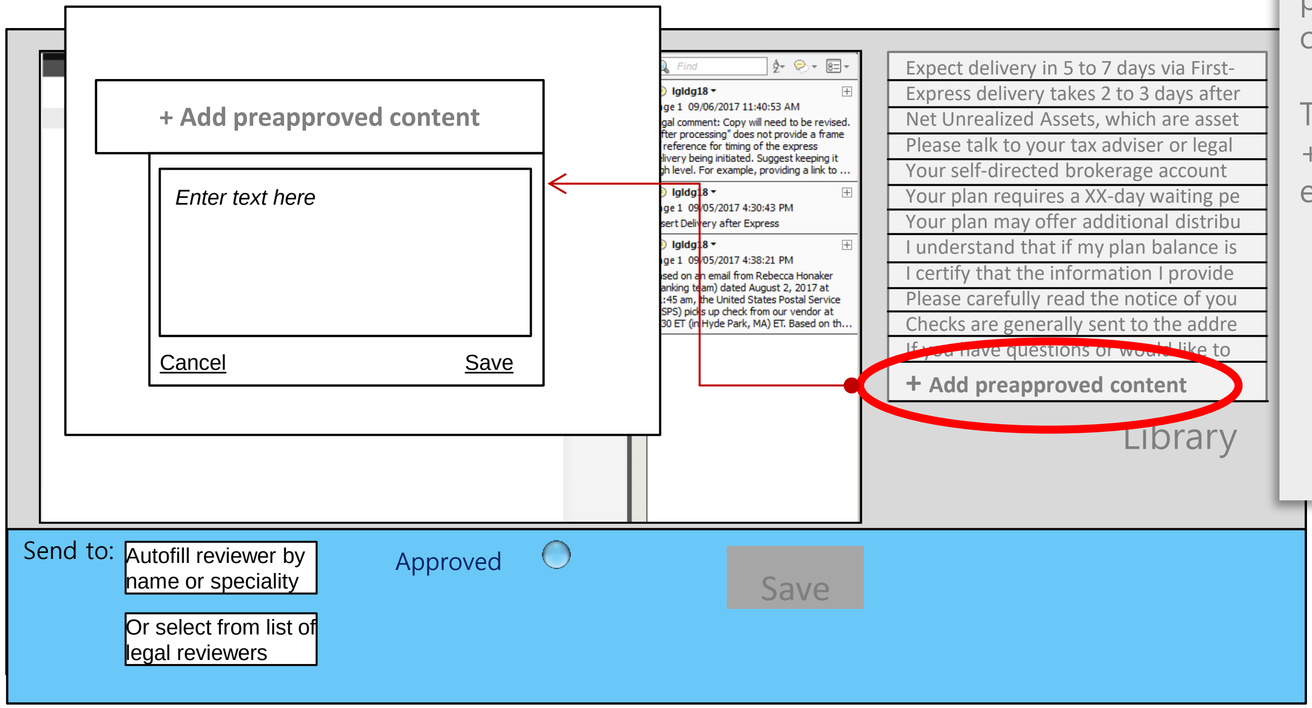
Pre-Approved Content Library: Add content



To paste, click cursor where phrase is desired, then double-click on library.

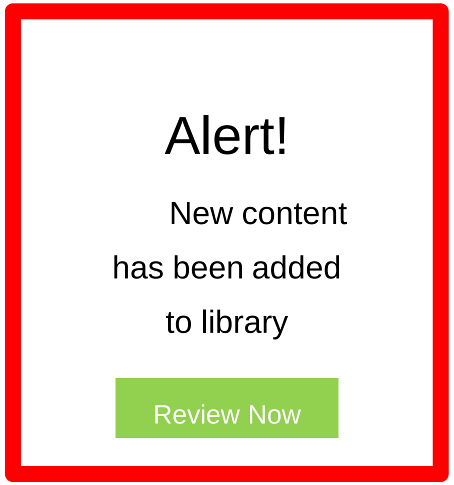
To add new content, click on +Add preapproved content, enter text in pop-up, and save.

Pre-Approved Content Library: Content approval workflow

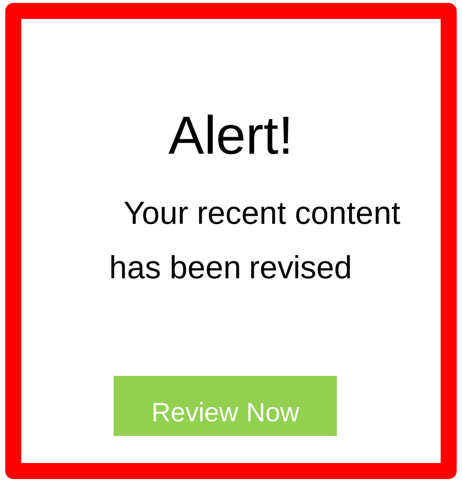
When content is added, an alert is sent to the content strategist, who will check for grammar, sentence structure, and consistency.

Admin can edit the new content to improve grammar or sentence structure.

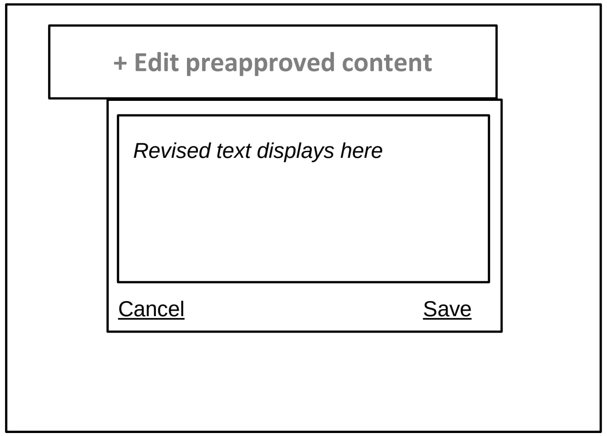
Legal creator can check the changes for correctness.



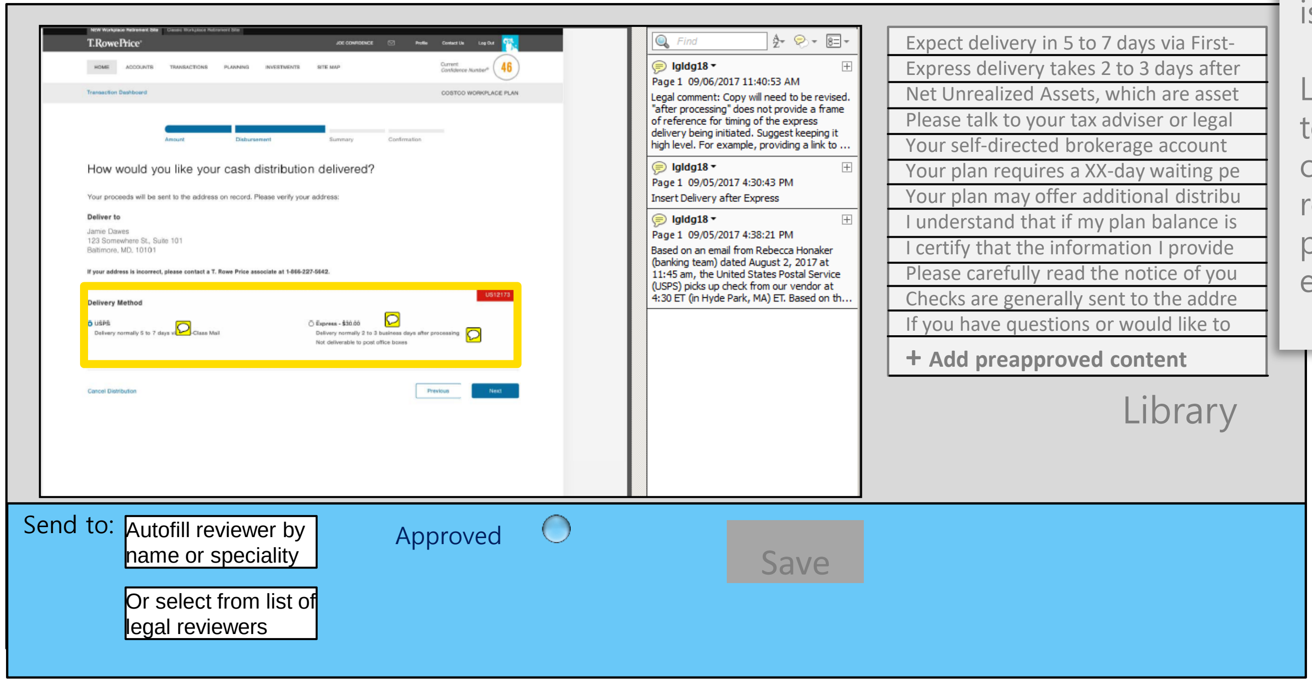
Content strategist alert



Legal contributor alert



Pre-Approved Content Library: Pre-approved content in use



When a screen includes pre-approved content, that content is enclosed by a yellow box.

Legal reviewers retain the ability to review the pre-approved content for context, but they are relieved from the need to perform a word-by-word examination.

Roles: Overview

- UX Designer
- QA
- Content Strategist
- Legal

Roles: UX Designer

- Creates and updates the flow during the development process

**Currently, we only capture the flows on paper, which prevents us from sharing or re-using them.
We should be capturing them digitally as a best practice anyway.**

Roles: QA

- When a QA person signs off on a screen, they take a screenshot and upload it

QA currently looks at every screen, so this additional step should be easy to add into their process.

Roles: Content Strategist

- Shepherds the process, ensuring that everyone is doing their part
- Manages roles and permissions in the application
- Annotates screenshots as necessary to help provide context for legal team
- Revises content in response to legal’s guidance and reports back to them on completion
- Uploads collated screen collection to AdMaster
- Reviews and revises library of pre-approved content for grammar, sentence structure, and consistency.

Roles: Legal team

- Each team's legal SME is the only person who can mark a screenshot as *Approved*
- Legal SME directs screenshots to specialized legal reviewers as necessary and follows up to ensure timely responses
- Legal SME works with specialists to ensure risk is properly categorized
- Legal SME and specialists can all add to library of pre-approved content

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THANK YOU