World Sustainable Contract Day

Verity White, Chief Contract Enthusiast, Checklist Legal

Journey to B-Corp: creating value through better contracting and measuring its impact

Certified B Corporation

High social and environmental performance

B Impact Assessment score of 80+ and pass risk review.

Legal commitment

Change corporate governance structure to be accountable to all stakeholders, not just shareholders

Transparency

Publicly share performance info measured against B Lab standards

Am I dumb because I don’t like the way contracts are written?

Corporate Services Agreement
Processes for new customers and variations

SOME RESOURCES

[Beginner's guide to mapping legal processes]

4
data points

BEFORE

Legal Time spent (hours)				8 hour working day		Labour cost		
How long does it take each time (hours)	3	15	Hours each week	1.88	Days each week	$	1,500	$ each week
				39.7%	% of working week (for 1 lawyer)			
How many times per week is it done?	5	65	Hours each month	8.13	Days each month	$	6,500	$ each month
Average hourly rate of lawyer	$ 100	780	Hours each year	98	Days each year	$	78,000	$ each year

Satisfaction: Rate this legal task in the following areas from 1 - 5		
VALUE	1	High Value = 5, Mid Value = 3, Low Value = 1 (How much value you feel you are adding as a legal professional by completing this task)
SKILL	1	High Skill = 5, Mid Skill = 3, Low Skill = 1 (Skill refers to level of legal knowledge, complexity, admin-heavy tasks would rate 1 or 2)
ENJOYMENT	1	High Enjoyment = 5, Mid Enjoyment = 3, Low Enjoyment = 1 (How much enjoyment you take as a legal professional in completing this task)
Task Satisfaction Index	**1**	

AFTER

Legal Time spent (hours)				8 hour working day		Labour cost		
How long does it take each time (hours)	0.5	2.5	Hours each week	0.31	Days each week	$	250	$ each week
				6.6%	% of working week (for 1 lawyer)			
How many times per week do?	5	10.8333333	Hours each month	1.35	Days each month	$	1,083	$ each month
Average hourly rate of lawyer	$100.00	130	Hours each year	16	Days each year	$	13,000	$ each year

Satisfaction: Rate this legal task in the following areas from 1 - 5		
VALUE	3	High Value = 5, Mid Value = 3, Low Value = 1 (How much value you feel you are adding as a legal professional by completing this task)
SKILL	2	High Skill = 5, Mid Skill = 3, Low Skill = 1 (Skill refers to level of legal knowledge, complexity, admin-heavy tasks would rate 1 or 2)
ENJOYMENT	5	High Enjoyment = 5, Mid Enjoyment = 3, Low Enjoyment = 1 (How much enjoyment you take as a legal professional in completing this task)
Task Satisfaction Index	**30**	

THE DIFFERENCE

Here are your results! These numbers are the metrics you can use for your quarterly performance review or team presentation.

Efficiency increase 83% **more efficient**

	Hours saved		Days saved		Labour costs saved		
Savings (Time and Lawyer Labour costs)	12.5	Hours each week	1.56	Days each week	$	1,250	$ each week
	54.2	Hours each month	6.77	Days each month	$	5,417	$ each month
	650	Hours each year	81	Days each year	$	65,000	$ each year

TASK SATISFACTION	CHANGE	What do job satisfaction scores indicate?
VALUE	1	Studies show that having the opportunity to use key skills and abilities to their full potential increases employee engagement. As a baseline, we consider whether the task is more or less satisfying after it is automated or otherwise innovated.
SKILL	1	
ENJOYMENT	1	https://www.psychologytoday.com/au/blog/good-thinking/201406/the-real-reasons-people-hate-their-jobs
Satisfaction increase/decrease	**7**	**times more satisfying as a task**

30
potential insights

WCC Contract design pattern library

CONTRACT DESIGN CANVAS

KEY DETAILS

Project in one sentence

Big important dates

Deadline	Task

Values

-
-
-

PHILOSOPHICAL

Purpose - Contract

-
-
-

Purpose - Project

-
-
-

ACADEMIC

Research

-
-
-

Users & Experts

Key Experts

-
-
-

Key Users

-
-
-

SCIENTIFIC

Poolside testing

	Before	After
Word Count		
Pages		
Words / sentence		
Reading time		
Passive Sentences		
Readability Grade		

Contract economics

What basic metrics can you gather up to assess impact of the redesign?

-
-
-

*See **Checklist Legal** for templates to calculate basic contact metrics.*

PHYSICAL

Contract Design Buffet

This redesign project will focus on the following areas of design:

- ❑ Information Design
- ❑ Plain Language
- ❑ Automation
- ❑ Testing
- ❑ Process Map
- ❑ Metrics

Design patterns & ideas

This redesign project will use the following design patterns:

-
-

See the IACCM Design Pattern Library for more examples of design patterns.

Technology

-
-
-

Integrative Law + Contracts

Linda Alvarez

Discovering Agreement: Contracts that Turn Conflict into Creativity

J Kim Wright

Lawyers as Peacemakers & Lawyers as Changemakers

Stewart Levine

Getting to Resolution & The Book of Agreement

Australian first, but hopefully not last!

Checklist Legal is the first AU law firm to earn the plain language certification

WriteMark®
Plain Language Standard

Service Conditions

CHECKLIST LEGAL

Sections in these Service Conditions

About these Service Conditions | Our relationship with you | Scope of legal services | Fees and payment | Protecting your information

Thank you for engaging Checklist Legal to provide legal services to you.

In this document:

- client, you, your means the person or business set out in the Proposal under the Client details section
- we, our, CLL means Checklist Legal Pty Ltd (ABN 32 643 121 279).

- About these Service Conditions -

1. This is our agreement with you for legal services

Our agreement to deliver legal services to you is set out in:

- the **Proposal** we give you for the relevant legal services
- these Service Conditions
- any **attachments** to the Proposal or Service Conditions.

Together, these documents form the Legal Services Agreement.

Priority of documents	Governing law	Entire agreement
If the above documents are inconsistent, the item earlier in the list takes priority.	The laws of the State of Victoria, Australia govern the terms of this Legal Services Agreement.	This Legal Services Agreement forms the entire agreement between us and you for legal services. It replaces previous written and spoken communications.

Some things fall outside our and your control

You and we are not liable to each other if we can't do what's set out in this agreement because of circumstances outside of our reasonable control (this is known as *Force Majeure*). But you are still liable to pay us for services we have completed.

2. You have rights in relation to legal services

Nothing in these terms affects your rights under the Australian Consumer Law.

- You have the right to negotiate the fee we charge and the method we use for our fees (task-based or time-based).
- You can request and receive an itemised bill within 30 days after a lump sum or partially itemised bill is payable.
- You have the right to get help from the Legal Services Commissioner if we disagree about legal costs.
- You have the right to be notified by us as soon as practical if significant changes occur that affect the cost of legal services or other costs.

- Our relationship with you -

3. Our client-lawyer relationship lasts for a set period

Our client-lawyer relationship starts when we are engaged under the Proposal. It ends either:

- when we complete the legal services set out in the Proposal or
- 6 months after you last asked for and we delivered billable legal services to you (if we agree to deliver open-ended legal services).

We might notify you of developments in the law from time to time. But we only have to inform you of developments if we have an agreed Proposal in place with you for legal services.

4. You make certain commitments to us

You promise to us that:

- you're authorised to engage and instruct us on behalf of any organisation you say you represent
- no restrictions prevent you from agreeing to this Legal Services Agreement
- you won't infringe any third-party rights in working with us and receiving our legal services.

5. You have certain responsibilities and obligations

We depend on you to:

- make sure we have your current contact details
- respond to our questions and give us relevant documents and instructions promptly
- give us accurate information and update us if things change (we rely on the information you give us)
- pay us on time in line with the Professional Fees section in the Proposal.

We're not responsible if you don't perform your obligations

We are not responsible for costs or losses you incur:

- if we do not progress your matter because you haven't paid our valid, undisputed Fees

6. You or we can end our client-lawyer relationship for certain reasons

You can end the agreement	We can end the agreement
You can end our legal services at any time by letting us know in writing (for example, by emailing us).	We can end the agreement if: - you don't pay undisputed bills after receiving a reminder - you don't give clear, timely instructions - you refuse to accept our advice, or you show you've lost confidence in our legal services - ethical issues come up which we believe require us to stop being your lawyer, such as a conflict of interest - something outside our reasonable control means we can't perform the legal services by a required timeframe.

You must pay for work performed

If this agreement ends, you must pay us for work completed and costs incurred up to the end date.

We may keep your documents after the agreement has ended

We generally store our files electronically. We may destroy your file after 7 years from completing services or ending our agreement with you. We can keep your documents if you owe us money, even if we no longer act as your lawyer.

- Scope of Legal Services -

You instruct us to deliver the legal services set out in the Proposal document. We highlight the following key areas where we are not responsible for what you (or others) do with our work.

7. Our advice and documents are only for you

Our advice and documents are only for you, in line with the Service Scope in the Proposal.

- Unless we agree first, you must not give our work to anyone else.
- We aren't responsible for any changes you make to our documents or advice.
- We aren't responsible for telling you about changes in the law after we deliver the agreed legal services.
- You engaged us to deliver legal services to you, in the context of your instructions. We aren't responsible for any other use of our legal services.
- If you engage us to create legal documents, we don't provide legal advice unless stated in the Service Scope.

8. We offer commercial legal services only

We don't offer financial product advice under the *Corporations Act 2001* (Cth). We don't provide

CHECKLIST legal

Service Conditions

Thank you for trusting Checklist Legal to help you with our legal services.

- **Client** and **you**, means the person or business in the **Client** details section of the **Project Brief**.
- **We** and **CLL** means Checklist Legal Pty Ltd (ABN 32 643 121 279).

1. Our agreement with you

Our agreement with you is made up of different parts

Project Brief	Service Conditions	Our Policies
The document we agree with you for key details of relevant legal services	Outline both of our obligations to each other and formalities of working with lawyers.	Includes our Privacy Policy and other policies

You are here

Together, these documents create our Legal Services Agreement with you.

- If these documents conflict with each other, the document listed earlier on the left takes priority.

2. About these Service Conditions

What's in these Service Conditions

Click on the icons below to go to that section

Our relationship	Touchstone	Legal Service Scope	Money stuff	Information & IP rights	Managing issues
Our relationship with you	Touchstone	This section, combined with the Project Brief, sets out the scope of legal services we supply	The fees you pay us for our legal services and the payment terms.	Information & Intellectual Property	How we will work through issues with you if they crop up.

And we hope to re-certify soon...

WriteMark®
Plain Language Standard

And achieve the Better Contract Design mark also!

Better Contract Design

Touchstone

3. Our Touchstone

This touchstone is an overview of what's important to us at Checklist Legal, it's why we get up in the morning! We hope this helps you understand our business and work with us more collaboratively.

Purpose

- **Innovate** the way the world creates & uses contracts.
- **Empower** women in business.
- **Inspire** lawyers to forge a different path towards improving the legal industry.

Vision

We see a world where women in business and law are confident in their contracts and legal rights, so they can have a bigger impact sooner.

Mission

To create contracts clients love in a way that empowers purpose-led women in business and law to innovate and succeed, while we lead the way for socially conscious law firms.

Values

We love our values so much, we made this playlist.

Serious fun	Confidence	Simplicity	Consistency	Generous learning
We balance the seriousness of business legals with a playful spirit of adventure. Work is challenging and enjoyable, often at the same time.	Our services give clients confidence to step up in their business & career.	We do the extra effort to make processes & information clear. Clear is kind.	We ship work to a visibly high standard. We are dependable. We have systems in place to support consistent delivery of high quality work.	We are curious, open, & eager to learn - we know we have lots to learn! We share our knowledge generously with clients, community, & colleagues.

Client Experience

During and after working with us, we hope that you feel:

Confident ✦ **Understood** ✦ **Delighted** ✦ **Energised** ✦ **Rebellious**

Please let us know if we haven't lived up to our Touchstone when working with you!

We're putting our values into our contracts

Checklist Legal Values Playlist

What our law firm measures

What our law firm measures

Each time we sign new clients	Each time our Stakeholders give us feedback	Each time we have a repeat client	Each time we send a newsletter	Our 2022 giving goal
1 day of empowerment for a woman leader in Cambodia	20 days of literacy training for girls in India	30 days of sewing training to women in need in Bangladesh	5 days of digital training skills to aboriginal communities.	**20,000** Impacts

What our law firm measures

Our Suppliers

We create impact in our Supply chain

More than 75% of our key suppliers are female or co-owned businesses

75%	80%	30%	60%	80%	30%
Female owned or co-owned businesses	Would work with us again	B Corp businesses	Australian owned	Publicly share their values	Publicly available code of ethics

What our law firm measures

Our Community

We share our skills to create impact and support Australian women in business

We donate 5% of our time to support female founders who need a hand with their legals

Pro Bono Program

What our law firm measures

Our Clients

We create impact through our innovative approach to legal services.

We work with majority female-owned businesses and female-led legal teams.

We monitor client satisfaction after working with clients and also as part of a longer-term review process.

We are refining and researching our theory of change to assess the impact

60%	30%	9	↑ 30%	↓ 25%	↑ 25%
Female-owned business or female-led legal team / law firm	B Corp businesses	Net promoter score	More confident with a Checklist Legal contract	Less contract stress	Faster to sign up and onboard new clients

WHERE CONTRACTING CAN TAKE YOU

VERITY WHITE

@checklistlegal

PLAIN Plain Language Association International

CLEAR Communication Awards 2019 Finalist

WriteMark® Plain Language Standard

CENTRE FOR LEGAL INNOVATION THE COLLEGE OF LAW

World Commerce & Contracting

THE COLLEGE OF LAW

LEGAL INNOVATION & TECH FEST

VSCL Victorian Society for Computers & the Law Inc.

ACC Association of Corporate Counsel AUSTRALIA

Legal INNOVATION & TECH FEST Online

LEGAL HACKERS MELBOURNE

LAW INSTITUTE VICTORIA

ALTA AUSTRALIAN LEGAL TECHNOLOGY ASSOCIATION

LBW LEGAL BUSINESS WORLD

EVOLVE PROGRAM SBE ACCELERATING WOMEN-LED BUSINESS

Business Chicks

Kochie's BUSINESS BUILDERS