Takeda Legal Match-Up

By Keli Chang

Github repo can be found here & redacted version of app here.

Framing:

This app was created with the intention to be only used for internal purposes at Takeda, where I currently work at. Takeda is a global company with many offices and legal teams across the world. The US legal team is approximately 70-80 people with two major offices: Boston and Deerfield. It is broken down into 3 subgroups: IP, Compliance, and Business. The clients for the US legal team are exponentially more and include different Takeda employees from the various research teams. These teams all stem from the 5 overarching groups including: Procurement, Pathology, Immunology, Vaccines, and Rare Diseases. The IP team handles all matters concerning IP and will always have someone look over any IP related issue/clause. They are roughly 40 people. The Compliance team handles any compliance related issue and often is needed for GDPR and FDA compliance. They are roughly 10 people. The Business team handles all other matters and is the main attorney group for all deals. They are often the first to be notified of any contract and will include other attorneys from Compliance and IP during the process. They are roughly around 20 people.

Certain issues that arose from the disproportionate numbers include:

1. No way to track # of requests a person receives and what kind of agreement is in demand.
2. Possibility of slowing down person who doesn't do that kind of agreement.
3. Agreement process could be stalled because it is not reaching the right attorney and is sitting in someone's email or in a stack on someone's desk.

This app will hopefully be able to address the above concerns. It is formatted to be as easy to understand as possible since the clients are not legally trained, resulting in the least amount of legalese. The process had to also be quick enough that the clients wouldn't get frustrated by the process and abandon it. The app should be easy to integrate with Takeda's current IT solutions.

Research/Ideation & Prototyping:

There are some legal chatbots that are similar in product but they cost anywhere upwards from $5,000.00 whereas my solution is free. Other solutions could be form banks, although they don't always provide enough explanations for the client, or having the attorney group in charge of the client's team listed internally, which sounds easy but hasn't been explored to my knowledge. Caveat: most older global corporations are slow to automated solutions and Takeda isn't different. The Boston legal team tried an automated solution many years ago although they were greatly disappointed by the lack of user experience taken into account. The driving factor for discontinuing its use was the long process that discouraged users from using it. Other attorneys who have joined more recently have suggested certain automated solutions their previous companies have used but these are usually lower priority for each fiscal quarter. Takeda's legal team is open to find a reliable solution but are wary of costs due to limited resources. They are also skeptical at automated solutions that claim to "do-it-all". The true driving factor of testing my app is because of the financial difference although they like that they could essentially build out their own automated solution. After some oral discussions with some attorneys, we narrowed down the required data points to 1) Requestor information (name, email, research team name); 2) Third party information (name, address); and 3) Project information (budget, type of work, brief description of work).

Different versions of this app were tested:

1) Downloading and directly emailing the report: This was the first prototype since saving the recorded answers was important and being able to automatically populate the email program to be ready to send was another feature I thought would be handy. The email feature unfortunately did not work due to network security settings so this feature had to be nixed. Luckily this feature might be integrated once this app has moved to an internal source (all based off Takeda servers) and has received IT approval. Downloading the report resulted in the default .txt format and was not wanted during testing due to its lack of readability.
2) Including all US legal attorneys: Originally, my idea was for the client to be able to directly reach their designated attorney. The coding was lengthy and after discussing with the managing attorneys (Associate General Counsels), I realised that certain agreement types were in higher demand than others. This would result in specific attorneys receiving more requests than others and wouldn't be that much different from the current state of things. After further discussions with the different attorneys, we decided that directing the clients to the managing attorneys would be better, as they could then divide the work amongst their teams. They would have a better understanding of who was available, whether a subject matter expert was needed, or if an attorney had a backlog of work. They would also be a good source of accountability and could notify other attorneys in different groups.
3) Offering control of the report to the client: At this point, downloading the report was a default setting and some attorneys expressed concern for an automatic download. They expressed that some would prefer to choose to save the document while others would want a read-only report, which they could then copy and paste to an email. The concern arose from some clients who may be wary of downloading another file onto their computers whereas if they could copy and paste to email, then they would still have a receipt of their report. This concern resulted in a solution which uses the parse function on QnA to allow for an imbedded report that the user could choose to save as or just copy and paste directly from. This feature may change once approved and integrated

into the Takeda network, as auto populating the default email program would be a faster solution.

User Testing:

Feedback 1 & Feedback 2 provided by different managing attorneys. I provided a template of questions for them to answer so I could receive uniform feedback to base my adjustments on.

Refinement:

In addition to the tweaks to features mentioned above, there were many minor changes to the formatting of the report and user experience. My goal was to be able to capture the necessary data for the correct managing attorney to be contacted but to keep the data intake to a minimum for the user to stay motivated for continued use. I also needed to keep the attorney's document count to a reasonable amount and something that wouldn't be more than a page was needed. This would be the initial request so the assigned attorney would only need a brief overview of the work order and a point of contact to discuss further. I did not ask the other testers to save their report so I have attached the test reports I saved based on previous versions.

Previous test report & current test report with screenshot of current test report

Intro Pitch:

Slide deck

Complexity/Robustness:

This app utilizes QnA and document automation.

Impact & Efficiencies:

This app would greatly increase the reach of the managing attorneys and their contact with the clients. Currently the managing attorneys receive their work from other in-house legal teams or from the manager of the client research teams. It has been expressed that anyone under the manager in the client groups has very little knowledge of how and who to reach for their legal needs. Once integrated, this app should provide the necessary access from lower level clients to accurately reach their designated attorneys. It should also help with involving the legal team early on in negotiations so they could better structure the contractual agreement. An example for when this would be useful is if a client wanted to file for Phase 2 testing of a drug. If legal is included early on, legal could help navigate and suggest third parties that we have a better relation with or who we have benefits from prior deals. Some situations could be financially beneficial also.

This wouldn't be adding more work to the managing attorney's plates as they already manage their respective teams and keep track of the workload for each attorney. This consolidated report would offer a quick summary of the work order and would help them swiftly determine who to assign it to.

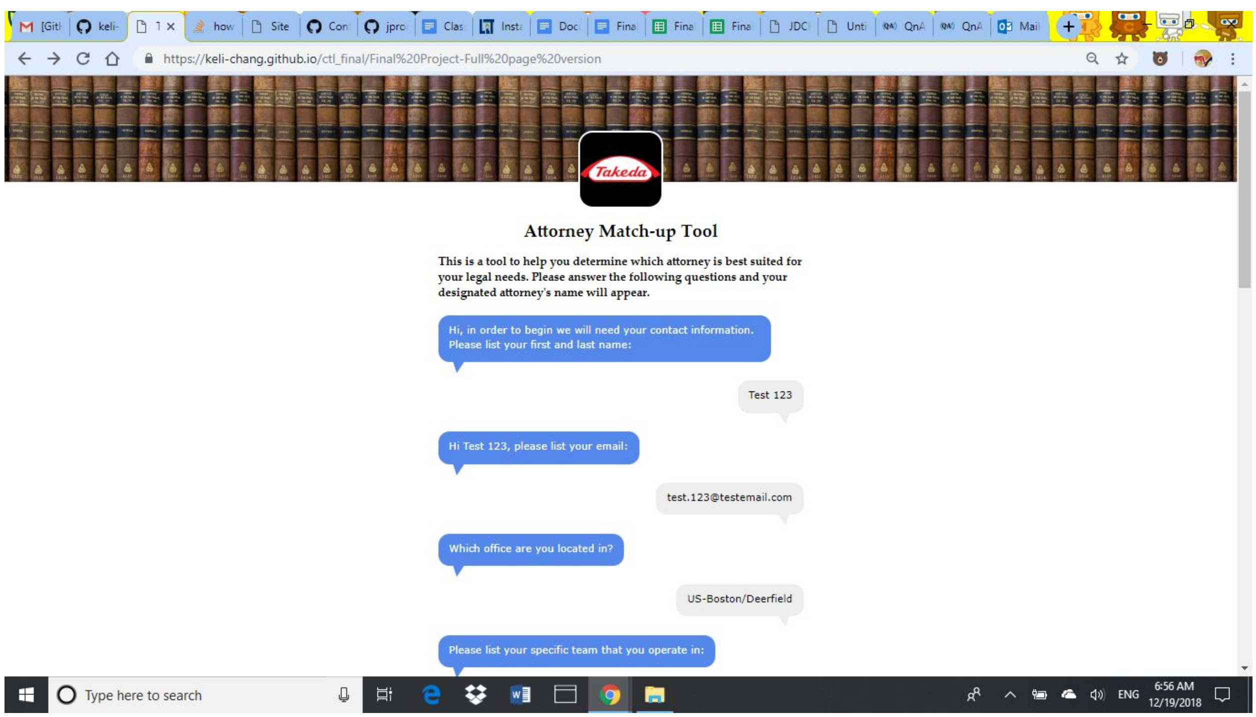
Partner letter is here.

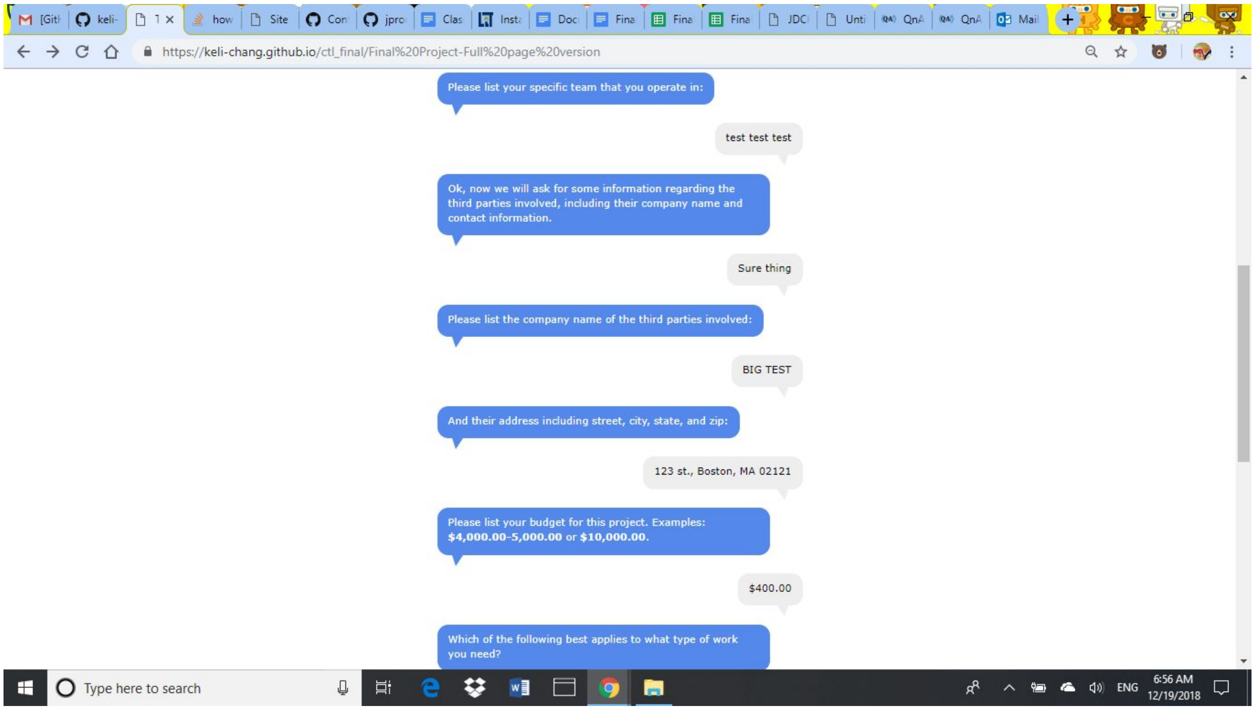
Fit/Completeness:

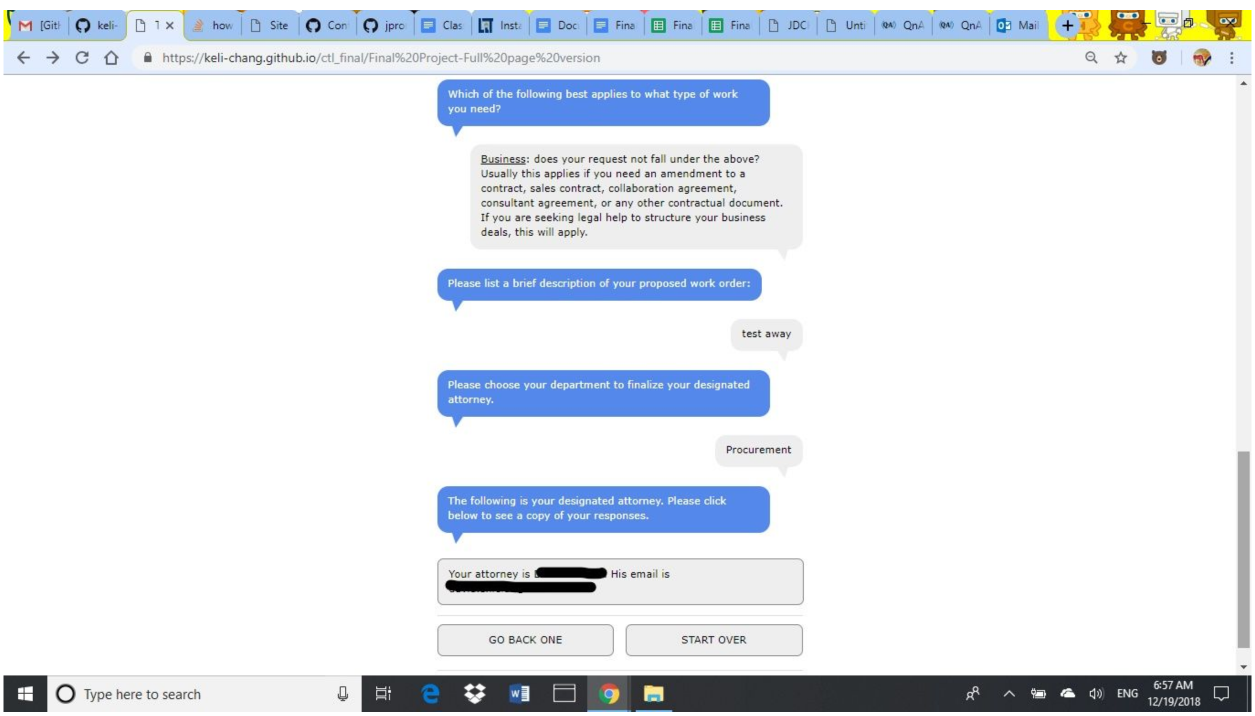
Produces viable output as it offers the option to see the report as a read only or to save as. Gives users some level of control. It also collects the necessary data for an attorney to understand the work order initially. Produces a concise report that is easy to read for both clients and attorneys and is a great improvement over the status quo.

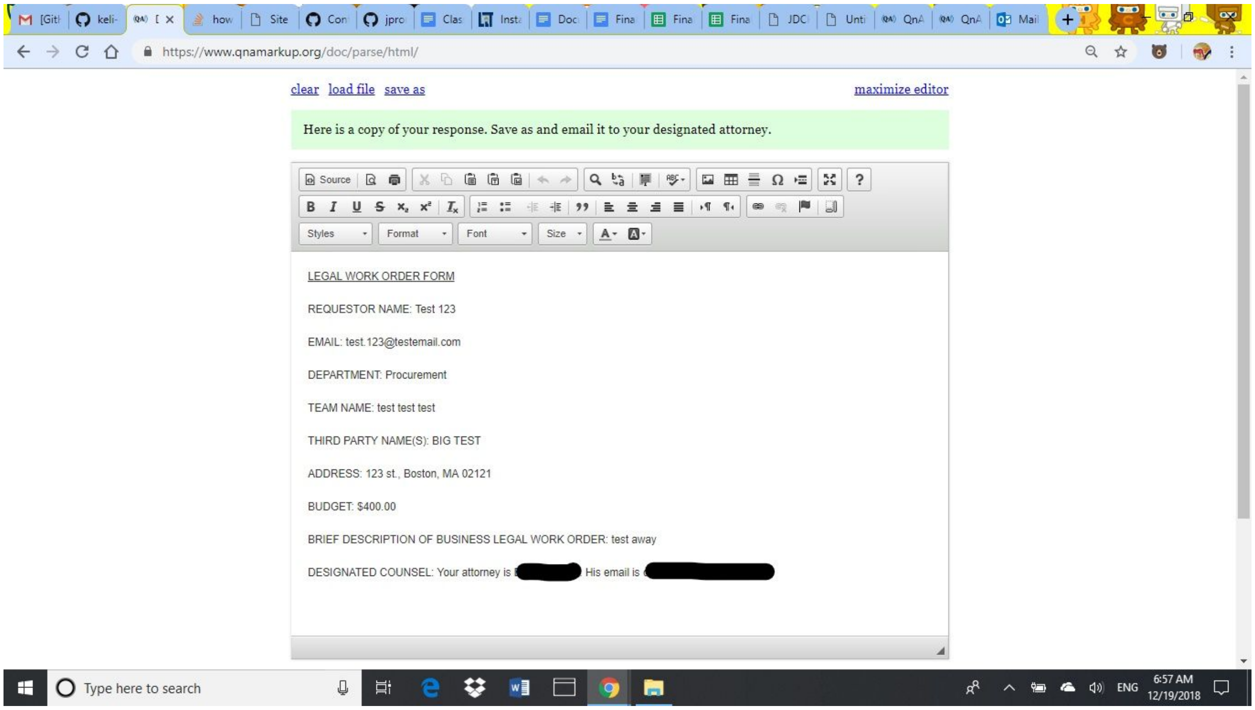
Documentation:

App questions are clear and could be easily navigated by the average client user. The final report documents the necessary data, through the DOC: function, to be efficient yet concise. Legalese kept to a minimum and examples are often included in possible questions and answers to help guide the user.




https://keli-chang.github.io/ctl_final/Final%20Project-Full%20page%20version
Please list your specific team that you operate in:
test test test
Ok, now we will ask for some information regarding the third parties involved, including their company name and contact information.
Sure thing
Please list the company name of the third parties involved:
BIG TEST
And their address including street, city, state, and zip:
123 st., Boston, MA 02121
Please list your budget for this project. Examples: **$4,000.00-5,000.00** or **$10,000.00.**
$400.00
Which of the following best applies to what type of work you need?
Type here to search
6:56 AM 12/19/2018


https://keli-chang.github.io/ctl_final/Final%20Project-Full%20page%20version
Which of the following best applies to what type of work you need?
Business: does your request not fall under the above? Usually this applies if you need an amendment to a contract, sales contract, collaboration agreement, consultant agreement, or any other contractual document. If you are seeking legal help to structure your business deals, this will apply.
Please list a brief description of your proposed work order:
test away
Please choose your department to finalize your designated attorney.
Procurement
The following is your designated attorney. Please click below to see a copy of your responses.
Your attorney is [redacted] His email is [redacted]
GO BACK ONE
START OVER
Type here to search
6:57 AM 12/19/2018



The final version of this app on Github is redacted (only the attorney names and emails) as there were data privacy concerns. (Example: Dxxxx Sxxxxxx or dxxxx.sxxxxxx@takeda.com) However the actual in-house version contains the full contact information for client users.

Real World Viability:

App would need to go through the approval of IT and then integration of it into the Takeda server. Once this happens, then integrating a direct to email function would be a better feature. Technological solutions are always open for tweaking and anything that would need to be changed would be minimal, excluding any changes that would occur from the Shire integration.

Sustainability:

Once this gets handed off to IT, they will be the main group in charge of it, although once this point is reached the solution should be in a finalized state with very little changes. Any updates to names would have to be through them and could easily be done with a direct notice. Until then, I will working at Takeda next semester and would be in charge of any maintenance or updates needed in the meantime.