

# 4 Ways Legal and Sales Can Drive Faster Deals



## INTRODUCTION

When it comes to closing deals, Sales and Legal are bound together in a three-legged race — ultimately working together but feeling burdened by the pull or drag of the other teammate. **But the most successful teams have figured out how to work in lockstep, and the key is transparency.**

To dig into how Sales and Legal can cut the entropy and focus on wins, we asked Lexion's Sales Director, David Smart, and Senior Legal and Business Operations Manager, Krysta Johnson, how they manage communication and expectations to keep deals agile.



David Smart  
Director of Sales, Lexion



Krysta Johnson  
Sr. Manager of Legal Ops, Lexion

## INTRODUCTION

Here are 4 practices Legal and Sales teams should prioritize and tips for implementing an accelerated sales mindset.

- 1 Align on priorities and value — early
- 2 Build trust with transparency
- 3 Practice operational excellence
- 4 Let go and learn from each other



# <sup>01</sup> Align on priorities and value – early



"I frequently ask Sales, 'I have these three deals on my plate. Which one is the most important to you? Which should I do first?'

Align on priorities and ensure you understand that you're doing the work they think is the highest value first."

Krysta Johnson, Sr. Manager of Legal Ops, Lexion

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When working with individual account executives, prioritization can be tricky, so **Legal and Sales team leaders should discuss priorities before involving the larger group**. Sales leadership must be able to reassure their team that Legal is aligned with their goals while also ensuring the Sales team is doing their part.

From David (Sales): When I look at my sales team, I ask, "Are we doing what we can to ensure things are going to be done effectively and efficiently at the end of the month?" We have to plan ahead.

Developing an **end-of-deal checklist** can put Sales teams in a better position at the end of the month. This provides a clear outline for what still needs to be done so they can collaborate with Legal as necessary and helps them focus on their own work. Getting contracts reviewed, getting language in front of customers, and completing security reviews earlier in the month creates a better working relationship between the teams.



# 02 Build trust with transparency



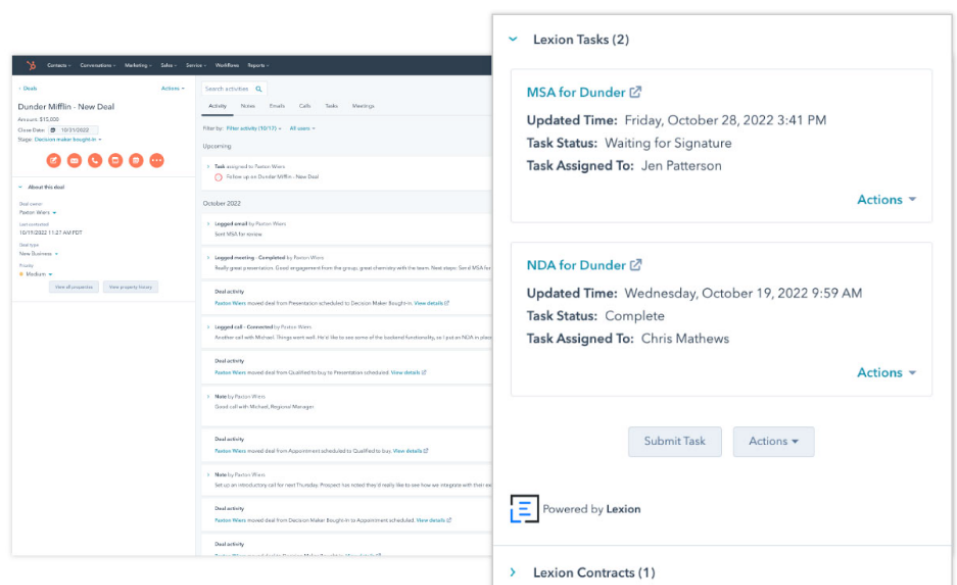
## BUILD TRUST WITH TRANSPARENCY

Sales teams are asked to trust that Legal is handling contracts, but that's hard to do if they can't quickly check on the status of a deal. Nobody wants to be the person filling up the Legal team's inbox or sending endless Slack messages. Yet sometimes, it feels like the only way to get through.

**Sales and Legal teams reach their shared goals through distinctly different processes. Developing ways to 1) Share what the process looks like and 2) Ensure everyone can reference this information will enable leadership to minimize friction.**

Legal tech is an excellent example of how **using the right tool can directly impact the business's bottom line**. Lexion's contract management software, for example, features a workflow component that tracks everything related to a specific task, including project status, approvals, communications, document versions, etc. It integrates seamlessly with Salesforce and HubSpot, too, so that team members can track the status of tasks with legal, see the latest activity, check signature status, and more without having to leave the comfort of their CRM.

Image: Lexion can embed legal task activity, signed contracts, and more inside your CRM



## BUILD TRUST WITH TRANSPARENCY

This kind of transparency has numerous benefits:

1. Promotes a culture of trust between teams
2. Helps to set expectations appropriately
3. Provides insight into how both sales interpret each task and legal

The redlining process is a prime example of sales and legal **learning from each other through workflow transparency**. David (Sales) explains, “We’ll look at [a contract] and say, ‘Not many redlines, so this should be easy,’ or ‘Lots of redlines; this is going to be difficult.’

But **there can be a small redline that has a huge impact** and can take a lot of time, or you can have something with easy redlines, and we can go right through it. Those indicators aren’t necessarily good ones for whether the process will be difficult or not.”

Krysta agreed, noting that she immediately goes to specific sections in every contract to determine how complex the negotiation process will be. Items like indemnification or limitation of liability are always on her radar, whereas a sales account executive might not understand the complexity and importance of wording surrounding those contract terms. Being able to refer to the workflow and see changes in near real-time can help to inform future deals.

With Lexion, legal can also **track the time it takes to negotiate and execute contracts on first party versus third party paper** (which often take longer to close). With that data, legal and sales can share the understanding that oftentimes one of the biggest steps toward closing deals faster is by asking prospects to use the company’s first party paper.



# 03 Practice operational education



Reliable tools can do a lot for a team, but having background information makes those tools even more valuable. David believes legal teams generally have a good idea of how sales teams operate, especially during the end-of-month hustle. He also acknowledges that people put themselves under pressure by not preparing for that anticipated time crunch. From the outside, this can look like a lack of respect for the legal team's time and resources.

To help prevent this, [schedule regular check-ins between sales and legal](#). This could be a meeting at the start of the month to review goals and check in again before the month's end. (Allow extra time during end-of-quarter and end-of-half meetings, as there will likely be more ground to cover.)

It's important for sales to help legal understand the pipeline, goals, and key metrics so the two can work together to remove points of friction throughout the process. Similarly, legal should educate sales on how it can best help them improve key metrics, hit sales targets, and reduce conflict. [Setting expectations and designing processes together gives sales and legal the best shot at working smoothly and effectively to close more deals in less time.](#)

David and Krysta [schedule one-on-ones at least twice a month](#) to discuss current deals, account executive feedback, and how specific deals are forecasted to close that given month are tracking. This is in addition to their end-of-month meetings when they take time to prioritize deals and evaluate the likelihood of which ones will close and which will require more work.

"More often than not, it's in counter-party review, or there's a business unit that needs to approve.

Being able to show this to sales means they can check in and increase that deal velocity. I can push that along and decrease the amount of time a contract is in that stage."

Krysta Johnson, Sr. Manager of Legal Ops, Lexion

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Legal and Sales teams should also review other items together, such as:

1. What resources does the other team regularly have?
2. How do they manage workloads?
3. Where could they use more help?
4. What does a typical day look like on this team?
5. Which times of the week, month, and quarter are busiest?

Legal tech can also provide **valuable metrics that identify workflow bottlenecks**, which sales teams can use to plan their contracting timelines accordingly. Johnson uses these metrics reports to determine which tasks can be automated (i.e., functions that take up the most volume) and to see where each contract spends most of its time. **People typically think contracts get stuck in legal review, but that's not the case.**

**Access to metrics also empowers sales teams to be more proactive in future contract negotiations.** Smart said, "If we usually have issues with a specific section of the agreement, or our terms will be redlined around the same area, we can get familiar with what we can and can't do. We can have conversations and set expectations with the customer upfront so that we're not running into unforeseen issues at the end of the month."

# 04 Let go and learn from each other



## LET GO AND LEARN FROM EACH OTHER

There are good and bad risks in business. To legal departments, though, all risk is bad risk, and it can be easy to get hung up on nailing down every last detail before moving a contract forward. However, Johnson said **it's important to know when to trust the other team and move on.**

"We're trained to spot risk and prevent it, but sometimes there's a risk it's okay to take," she said. "You have to get comfortable sometimes letting business make those decisions and understanding that **there's a difference between business risk and legal risk.** While they might intermingle, sometimes you have to let things go."

In these situations, it's important to compromise. Sometimes, one side or the other won't get exactly what they want, but **it's vital to know what sales and legal can or can't concede.**

Getting the business side to understand, 'We've conceded on all these points, but we can't on this one,' and teaching them why that's important — educating each other. David teaching me about business risk and me teaching him, and his account executives, about some of the legal concepts builds trust."



## ABOUT LEXION

Lexion is an incredibly easy-to-use contract management system. We're on a mission to make legal teams highly productive and happy, by accelerating contract review and eliminating busywork through automation and AI. We use best in class natural language processing technologies to make it 100 times easier for legal teams to find what's in their contracts and automatically stay organized.

Best of all, Lexion's email-centric approach, and legacy contract onboarding, makes implementation and adoption easy. We built Lexion at Microsoft co-founder Paul Allen's artificial intelligence research institute (AI2) and are backed by the same investors that funded OpenAI (Khosla Ventures), helped launch Amazon (Madrona Venture Group), and have advised Google (Wilson Sonsini). With a top notch and experienced team from Microsoft, Facebook, Google, and Amazon, we built a company that CB Insights ranked the #1 most promising AI legal tech startup in the world two years in a row (2020, 2021). Lexion is a Top 40 Intelligent Application based on votes from Goldman Sachs, Madrona, Khosla Ventures, Andreessen Horowitz, Sequoia Capital, and many of the top AI investors in the world.

Most importantly, fantastic brands trust Lexion to manage their contracts: Outreach, OfferUp, Blue Nile, Brooks, and many more.