

Unlocking faster deal velocity and lower cost through AI-ready legal design

THE CHALLENGE

A major global banking and financial services client faced significant limitations in the speed, scalability and effectiveness of its NDA process. Fragmented playbooks, inconsistent risk interpretations and undocumented, tacit knowledge drove escalations, extended cycle times and variable outcomes. Senior legal resources were routinely drawn into low-value processes.

The bank identified the NDA workflow as a priority opportunity for AI-enabled legal optimisation using AI systems. Fragmented guidance and regional inconsistencies meant the underlying content first needed to be simplified, aligned and redesigned for AI system use.

THE COMMERCIAL OBJECTIVE

Create a single global playbook, replacing the patchwork of regional and product-specific documents, useable by the client's legal and business teams worldwide and ready to power AI-assisted NDA review and redlining at scale.

Objectives
- Increase deal velocity by removing friction from NDA negotiations
- Lower cost per contract through reduced legal touchpoints and re-work
- Protect risk, at scale, with consistent and pre-agreed negotiation outcomes
- Accelerate AI ROI by automating NDA guidance and review
- Free up senior legal resources for higher-value strategic work

THE SOLUTION

Cognia delivered a five-week legal advisory and co-design sprint, partnering with the bank's legal, business and AI team stakeholders.

The sprint included review of NDA collateral, stakeholder sessions and a full redesign of the client's playbooks and guidance to clarify decision parameters and escalations, align risk frameworks and codify practical negotiation insights across divisions and products.

Key outputs included:
- **A single, unified NDA playbook**, reducing guidance volume by 85% (300+ pages to <50), with codified risk positions, decision logic and escalation points
- **An AI-ready NDA knowledge base**, structured to enable AI-assisted first-pass redlining, with legal teams reviewing output before release to internal stakeholders and counterparties

Delivered by Cognia legal engineers and advisory specialists working alongside the bank's legal and AI teams.

THE IMPACT

Faster time to agreement: clear decision pathways and fallback positions reduce negotiation cycles, escalation volumes and approvals

Lower operating cost: fewer escalations and touchpoints, less rework and increased reviewer capacity reduce cost per NDA

Consistent outcomes at scale: standardised positions protect risk while enabling consistent results across teams

AI-ready foundation: structured, modular guidance enabling intake, clause prompting and automated exception handling - unlocking faster returns on legal AI investment

Operating model evolution: enabled a move towards an AI-enabled, exception-based NDA model, with clearer routing, escalation and human oversight

THE RESULT

The bank established a scalable, AI-ready contracting foundation deployed globally across its legal teams, driving faster revenue enablement, lower legal cost and controlled risk as NDA volumes scale.

This engagement reflects Cognia's broader capability in AI enablement and legal operating model transformation. By redesigning legal knowledge, processes and decision frameworks for AI, we help legal teams rethink how work is delivered – what can be automated, where human judgement adds most value, how work is routed and escalated, and how consistency, risk and oversight are maintained at scale. Cognia can apply this approach across contracting and other legal workflows to create scalable, AI-enabled operating models that combine technology, process and legal expertise in new ways.

We are trusted partners to three of the top ten FTSE 100 companies and 25% of the top 20 global banks.

Are you ready to take the pressure off your legal team and free up capacity for what really matters?

Let us take the burden away from you.

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