

The background is a dark blue-tinted photograph of a group of people sitting in a circle on a patterned carpet, engaged in a workshop. They are holding papers and looking towards the center. Large, semi-transparent geometric shapes in shades of orange, red, and blue are overlaid on the image, framing the central text.

# Getting Sh\*t Done: Workshop Efficiency for Your Law Department

5/10/2022

# Panelists



**Stephen Allen**  
VP, Get Sh\*t Done  
Elevate



**Kunoor Chopra**  
VP, Legal Services  
Elevate



**John McGrory**  
VP, Deputy General Counsel-  
Commercial  
Under Armour

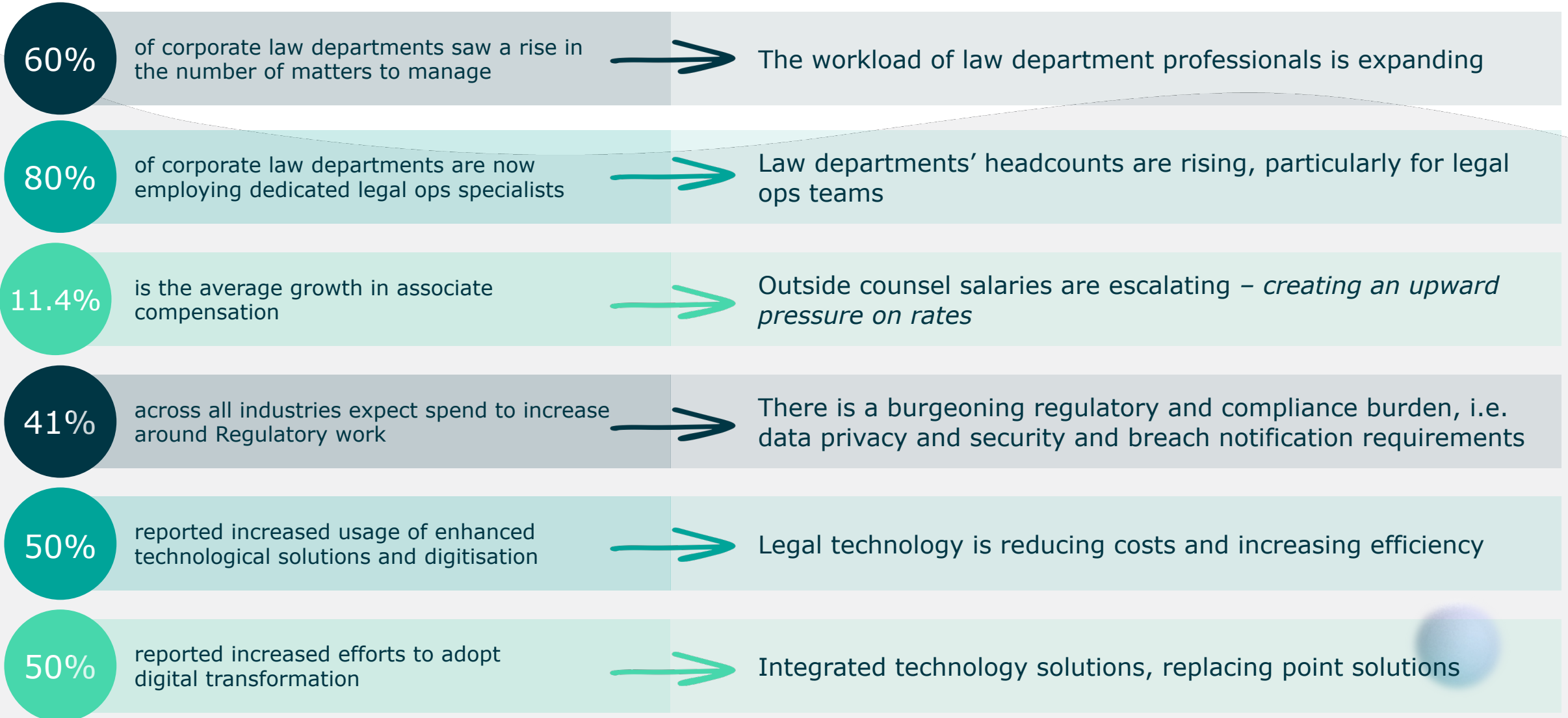


**Lawton Penn**  
Sr. Manager Litigation Operations and Sr.  
Corporate Counsel – Employment  
Amazon



**Mike Russell**  
Head of Global Legal Operations  
Expedia Group

# Current Trends<sup>1</sup>



<sup>1</sup> "Vertically integrated Legal Service" by Neville Eisenberg and Richard Susskind in *The Practice* – Vol. 7 Issue 4 May/June 2021; *Alternative Legal Service Providers: 2021 Report* (Thomson Reuters Institute, the Center on Ethics and the Legal Profession at Georgetown Law, and the Saïd Business School at the University of Oxford); *2022 Report on the State of the Legal Market*, by the Center on Ethics and the Legal Profession at Georgetown University Law Center and the Thomson Reuters Institute.

# CLOC 12 Core Competencies

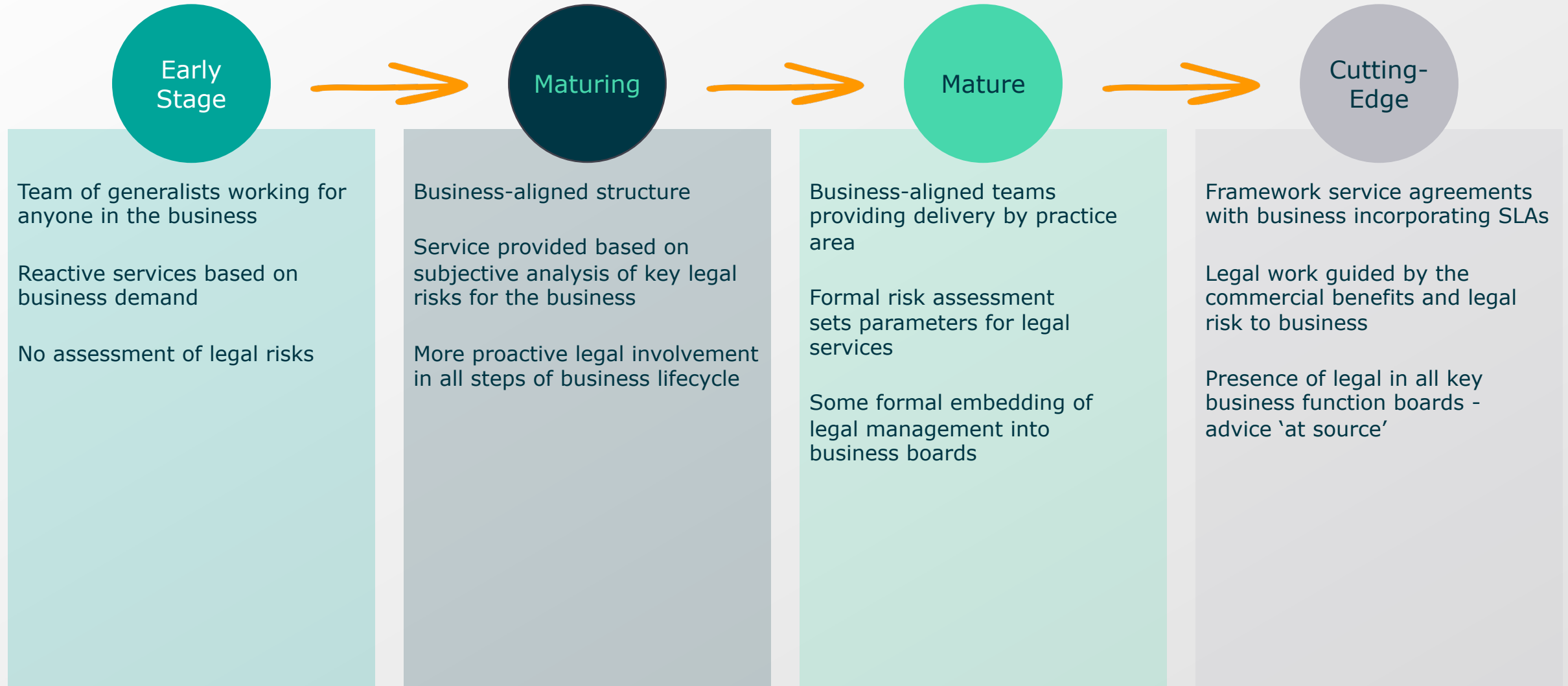


# Legal Operations Maturity Model

	Early Stage	Maturing	Mature	Cutting-Edge
Alignment with Business and Legal Specialism	<ul style="list-style-type: none"> <li>Team of generalists working for anyone in the business</li> <li>Reactive services based on business demand</li> <li>No assessment of legal risks</li> </ul>	<ul style="list-style-type: none"> <li>Business-aligned structure</li> <li>Service provided based on subjective analysis of key legal risks for the business</li> <li>More proactive legal involvement in all steps of business lifecycle</li> </ul>	<ul style="list-style-type: none"> <li>Business-aligned teams providing delivery by practice area</li> <li>Formal risk assessment sets parameters for legal services</li> <li>Some formal embedding of legal management into business boards</li> </ul>	<ul style="list-style-type: none"> <li>Framework service agreements with business incorporating SLAs</li> <li>Legal work guided by the commercial benefits and legal risk to the business</li> <li>Presence of legal in all key business function boards - advice 'at source'</li> </ul>
Resourcing Strategy	<ul style="list-style-type: none"> <li>Limited team involvement on work passed straight to law firms</li> <li>Law firms provide overflow resourcing and capability coverage</li> <li>No use of law companies</li> </ul>	<ul style="list-style-type: none"> <li>In-house capability grown to match demand; large projects cause significant disruption</li> <li>Law firms are used subjectively</li> <li>Definitions for in-house teams, but inconsistent and not formalised</li> </ul>	<ul style="list-style-type: none"> <li>Internal and external resourcing decisions based on work value, complexity, and volumes</li> <li>Some understanding and use of law companies</li> <li>Simple demand planning</li> <li>Consistent role definition and work allocation across in-house teams</li> </ul>	<ul style="list-style-type: none"> <li>Internal and external resourcing aligned with assessments of value and complexity of work</li> <li>Law companies fully embedded in ecosystem</li> <li>No use of law firms for capacity; ability to flex resourcing quickly</li> <li>Management information and proactive demand planning</li> </ul>
Spend Management	<ul style="list-style-type: none"> <li>Uncontrolled external spend</li> <li>Spend tracking relies on law firm management information</li> <li>No matter scoping</li> <li>Engagements on rack-rates or discounted rack-rates</li> </ul>	<ul style="list-style-type: none"> <li>Repeating spend with law firms</li> <li>One-off spotlights on global spend for budgeting</li> <li>Scoping, AFAs, and bespoke terms and conditions used for major matters</li> <li>Outside Counsel Guidelines (OCG) in place</li> <li>Ad-hoc invoice review</li> </ul>	<ul style="list-style-type: none"> <li>Major spend areas designated for RFP or consolidate with firms</li> <li>Regular spend data updates and analytics at practice area level</li> <li>Scoping and AFAs extended to lower value matters</li> <li>Billing rules embedded in e-billing platform to match with OCG and assist in invoice review</li> </ul>	<ul style="list-style-type: none"> <li>Formalised strategy to consolidate or RFP at matter level</li> <li>Real-time data analytics and scorecards</li> <li>Automated, widespread usage of scoping and AFAs</li> <li>Automated bill review, approvals, and spend recovery embedded in payments process</li> </ul>
Operations and Infrastructure	<ul style="list-style-type: none"> <li>No Legal Ops roles and responsibilities</li> <li>Ad-hoc ops issues supported by in-house staff</li> <li>No documented processes</li> </ul>	<ul style="list-style-type: none"> <li>Legal Ops roles assigned and focused on back-office processes</li> <li>Isolated efforts to improve processes and streamline spend mapping</li> <li>KM processes are ad-hoc</li> </ul>	<ul style="list-style-type: none"> <li>Well-defined legal processes and guidelines supported by LPM</li> <li>Dedication to continuous process improvement</li> <li>KPIs defined in some areas</li> <li>KM strategy defined</li> </ul>	<ul style="list-style-type: none"> <li>Partnership with law firms and law companies extends to back-office functions</li> <li>Strategy and roadmap for improvements in front- and back-office technology and processes</li> <li>Responsive management by KPIs</li> <li>Proactive KM adopted consistently</li> </ul>
Technology	<ul style="list-style-type: none"> <li>Data collation via spreadsheets</li> <li>Knowledge stored on individual machines</li> <li>Emailed invoices</li> </ul>	<ul style="list-style-type: none"> <li>Centralised real-time dashboard and analytics capability</li> <li>Paper-based filing eliminated</li> <li>TAR used occasionally for eDiscovery</li> <li>Consistent and inter-operable systems architecture</li> <li>Digital approvals for all legal and non-legal transactions</li> </ul>	<ul style="list-style-type: none"> <li>Legal front door</li> <li>Enterprise search across data sources</li> <li>Centralised CLM used widely</li> <li>IP prosecution and patent lifecycle system in place</li> <li>TAR used for eDiscovery</li> <li>Integrated matter management and e-billing</li> <li>Formal technology strategy</li> <li>Fully integrated eSignatures and workflow with CLM</li> </ul>	<ul style="list-style-type: none"> <li>Centralised real-time dashboard and analytics capability</li> <li>TAR used consistently for all eDiscovery</li> <li>Consistent and inter-operable systems architecture</li> <li>Use of AI process automation, new branding, and chat bots</li> </ul>

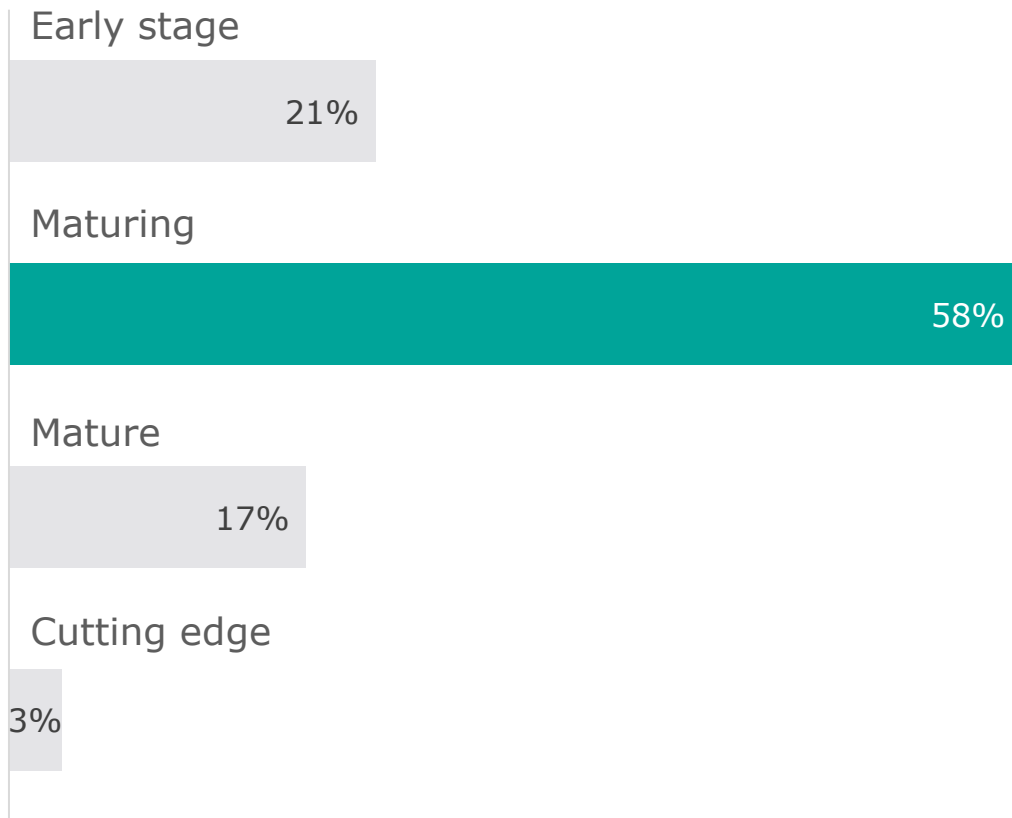
# Legal Operations Maturity Model

Alignment with Business and Legal Specialism



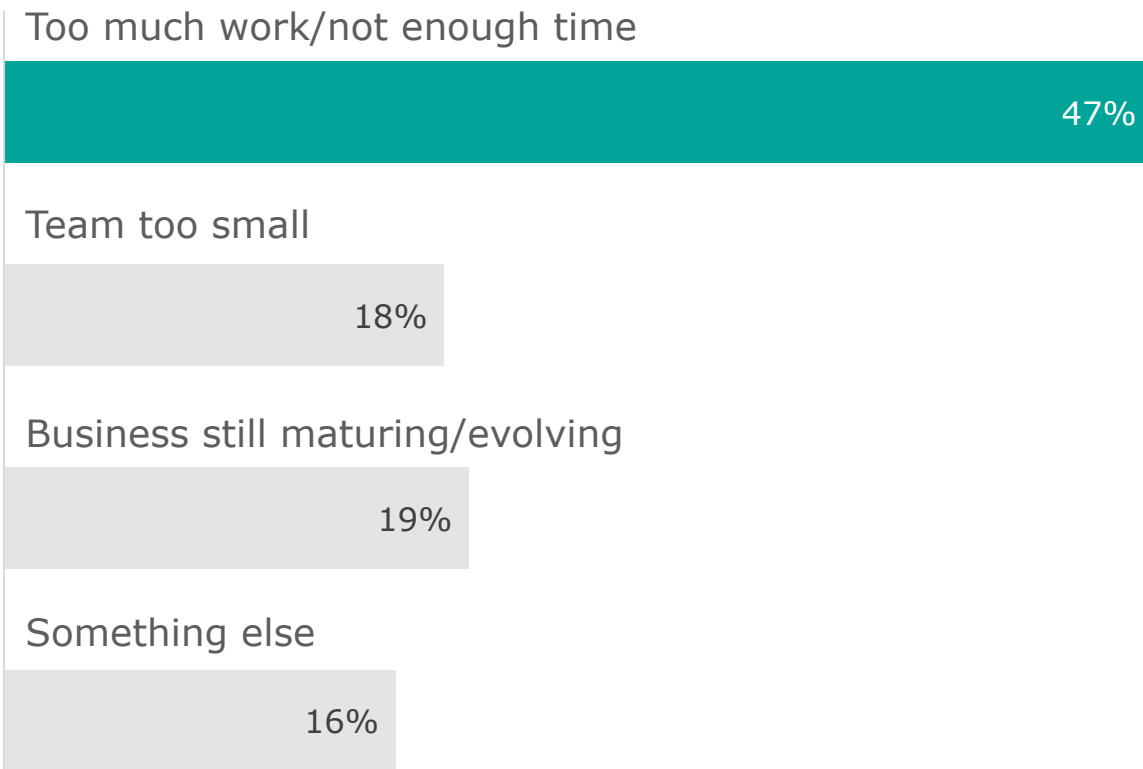
# Alignment with Business and Legal Specialism

## 1. How would you rank your law department:



# Alignment with Business and Legal Specialism

## 2. What's currently holding your team back from improving your department's maturity:



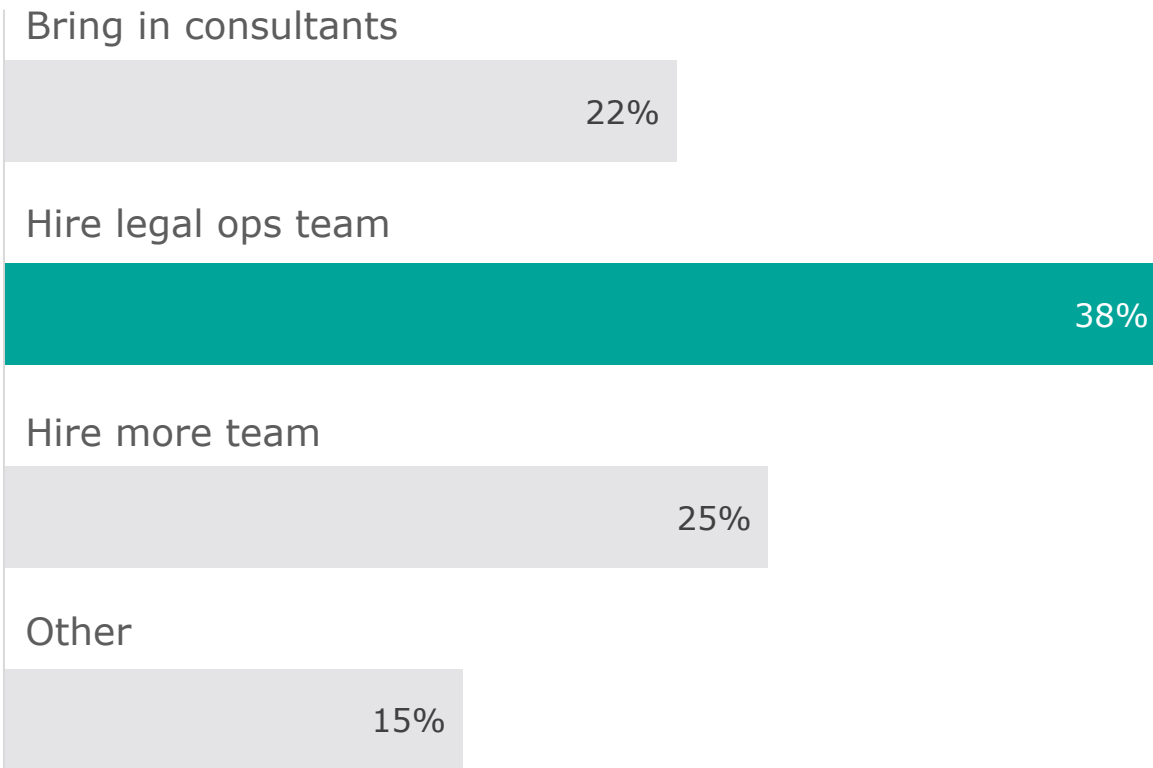
### Explain "Something else":

- There needs to be a commitment to change.
- The legal team tends to have a "fixed" mindset.
- The department needs a "buy-in" mindset.
- Change is hard and slower than desired.
- There is too much other change within the organisation. We have a slow-moving culture.
- There is resistance to change and to dedicating resources to the effort.
- The department's relationship with external counsel needs improvement. We also need to overcome the current strain on industry resources.



# Alignment with Business and Legal Specialism

## 3. What have you done to break through to the next level of maturity:

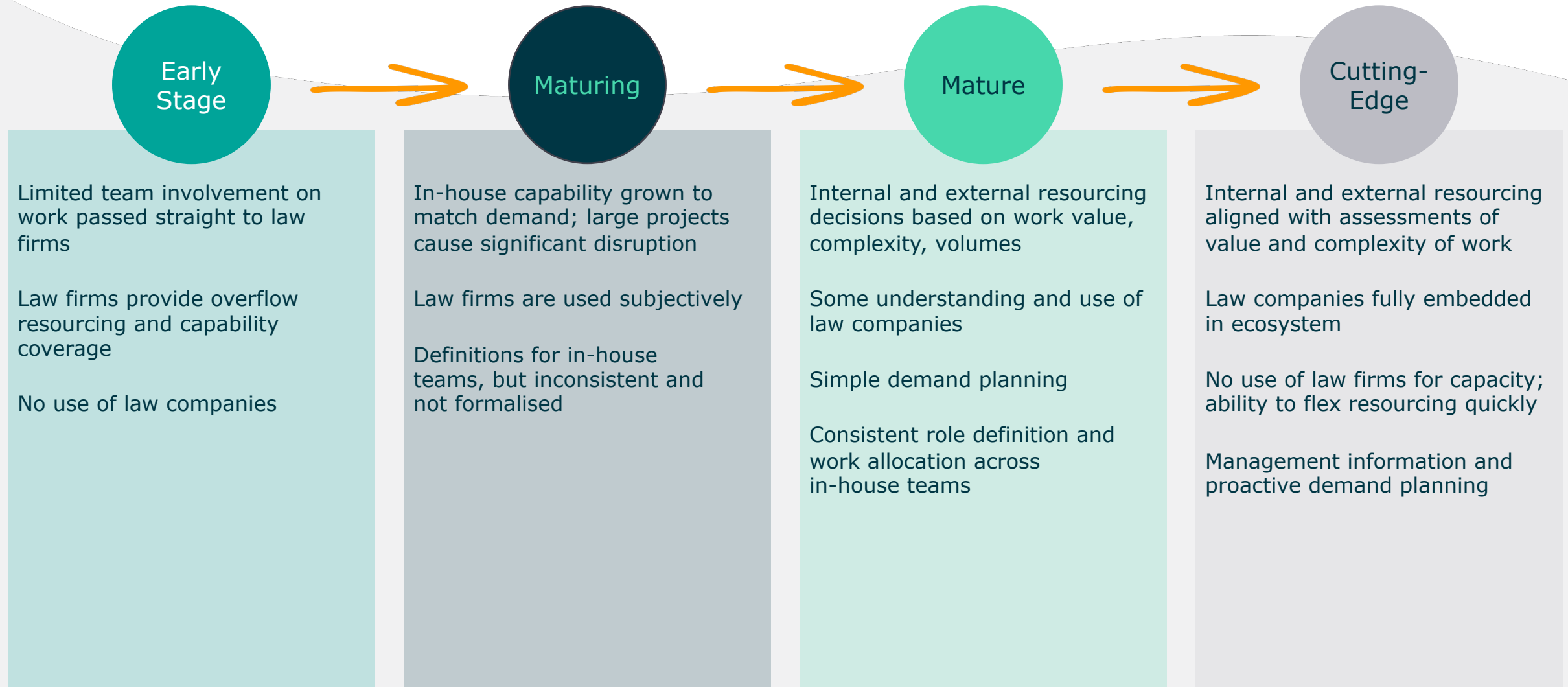


### Explain "Other":

- We leverage a shared services model.
- We assess team members' comparative advantage to ensure we're all working at our best level.
- We educate teams on evolving legal ops.
- We get organised and prioritise.
- We leverage technology.
- We continue testing and iterating.
- We keep pushing.

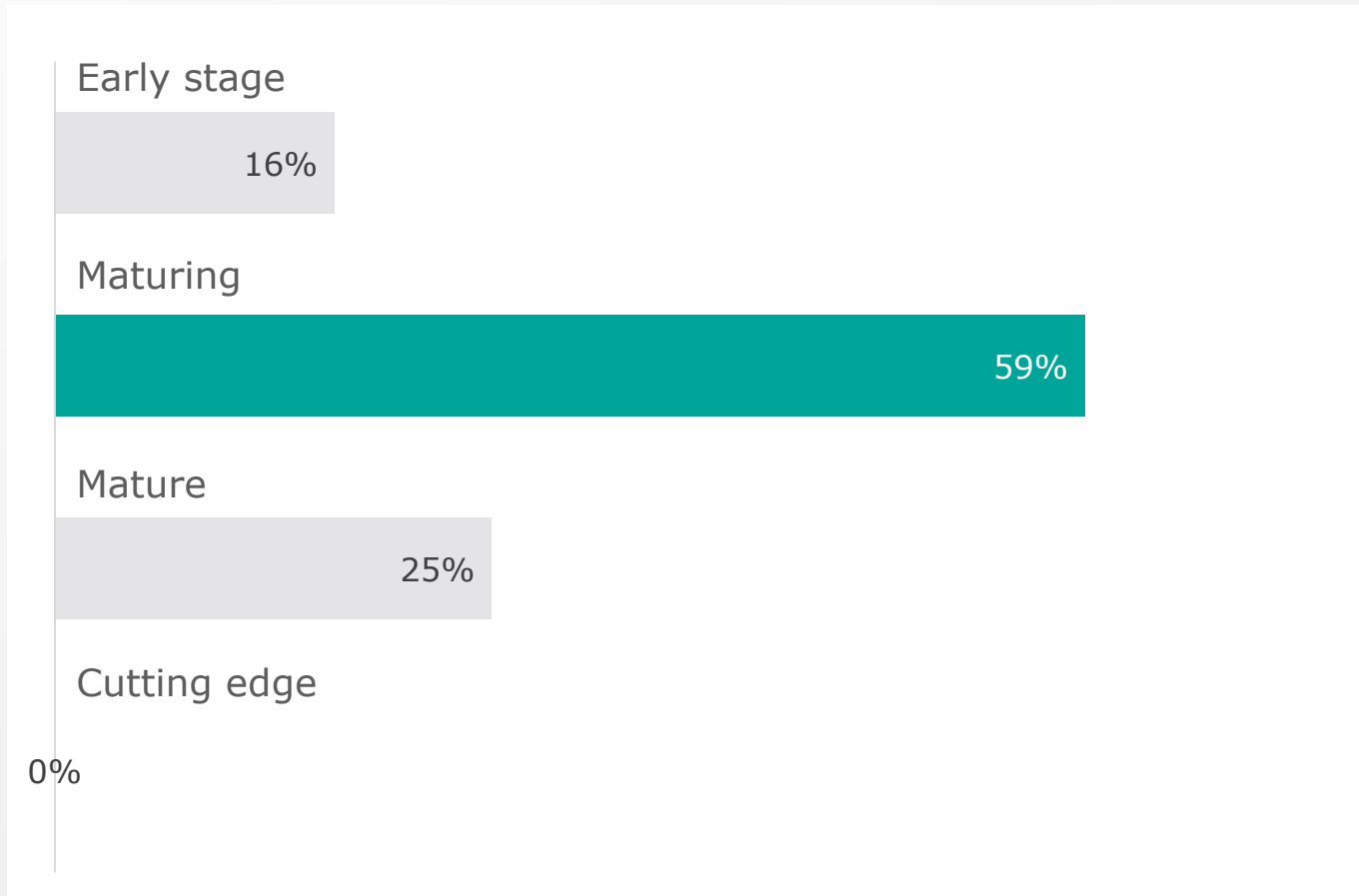
# Legal Operations Maturity Model

## Resourcing Strategy



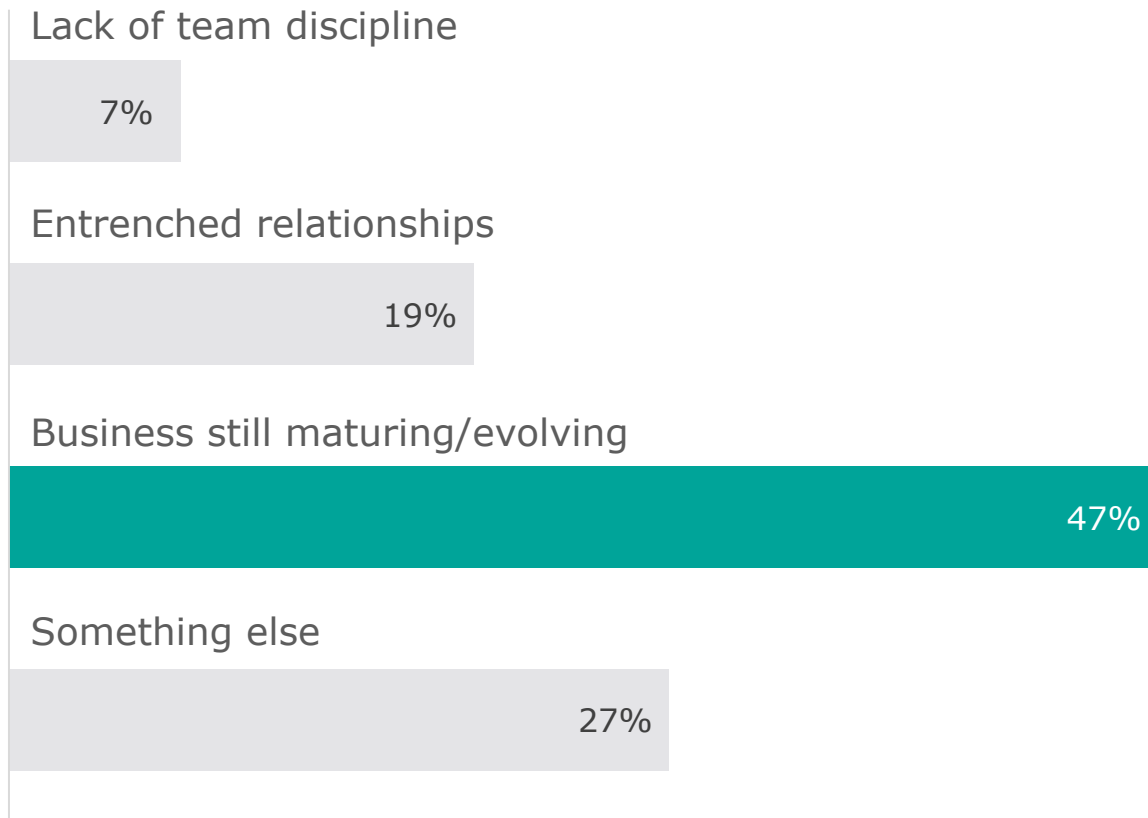
# Resourcing Strategy

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# Resourcing Strategy

## 2. What's currently holding your team back from improving your department's maturity:

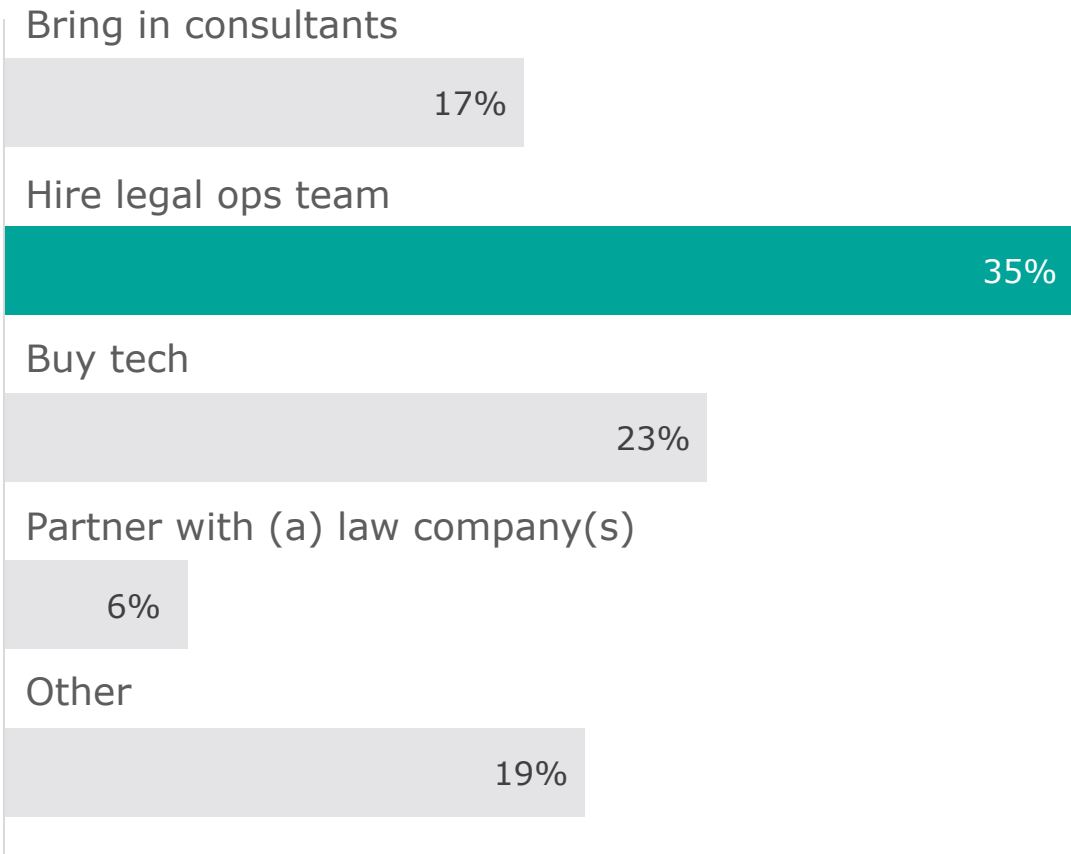


### Explain "Something else":

- The department is moving so quickly and not taking the time to revisit or analyse situations.
- We have attrition as well as a resistance to change.
- Our culture is slow to adapt.
- There are too many competing priorities.
- Our daily workload doesn't allow for strategic innovation.
- Capacity is a challenge.
- Our leadership is holding us back.

# Resourcing Strategy

## 3. What have you done to break through to the next level of maturity:

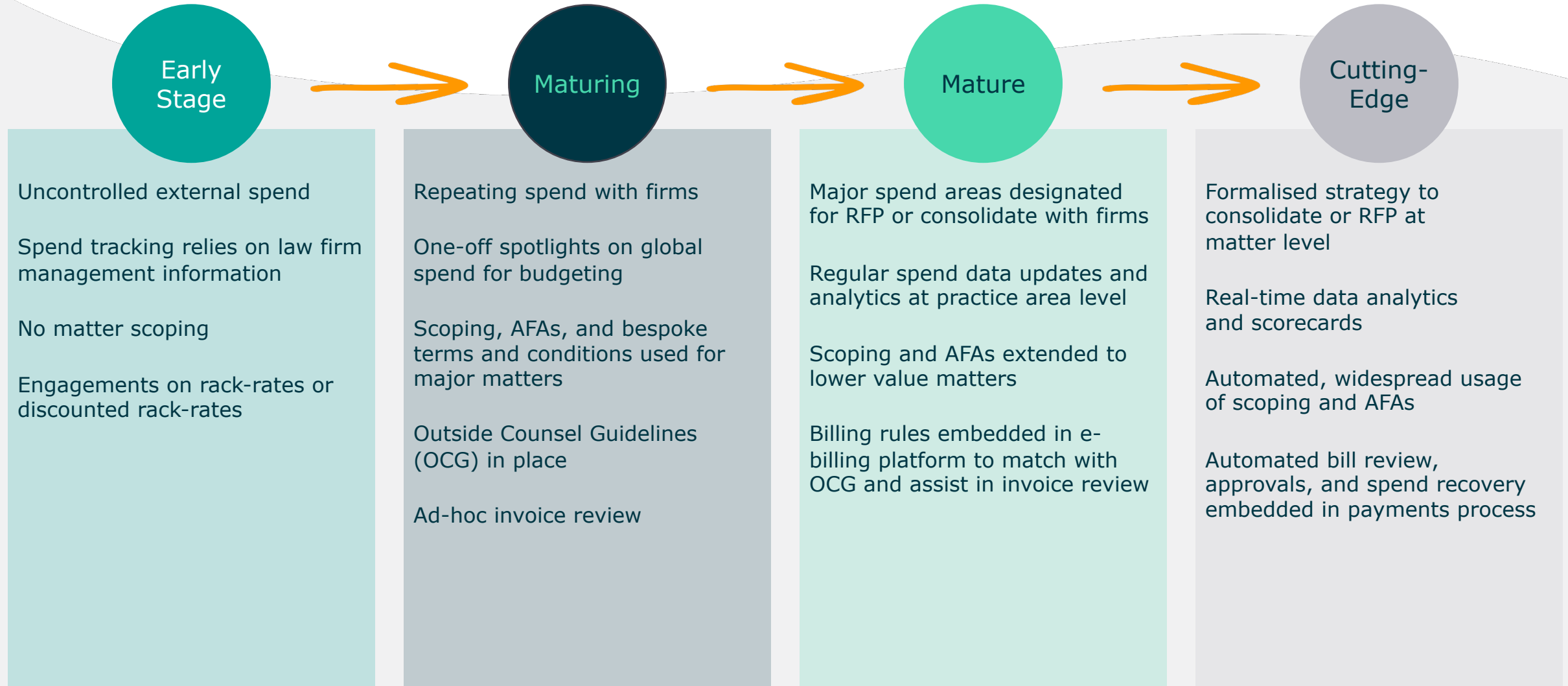


### Explain "Other":

- We dedicate time to change management.
- We outsource a subset of work.
- We review our work allocation approach with teams; encourage the right work at the right level.
- We get lawyers on board for change.
- We are implementing all of these ideas.

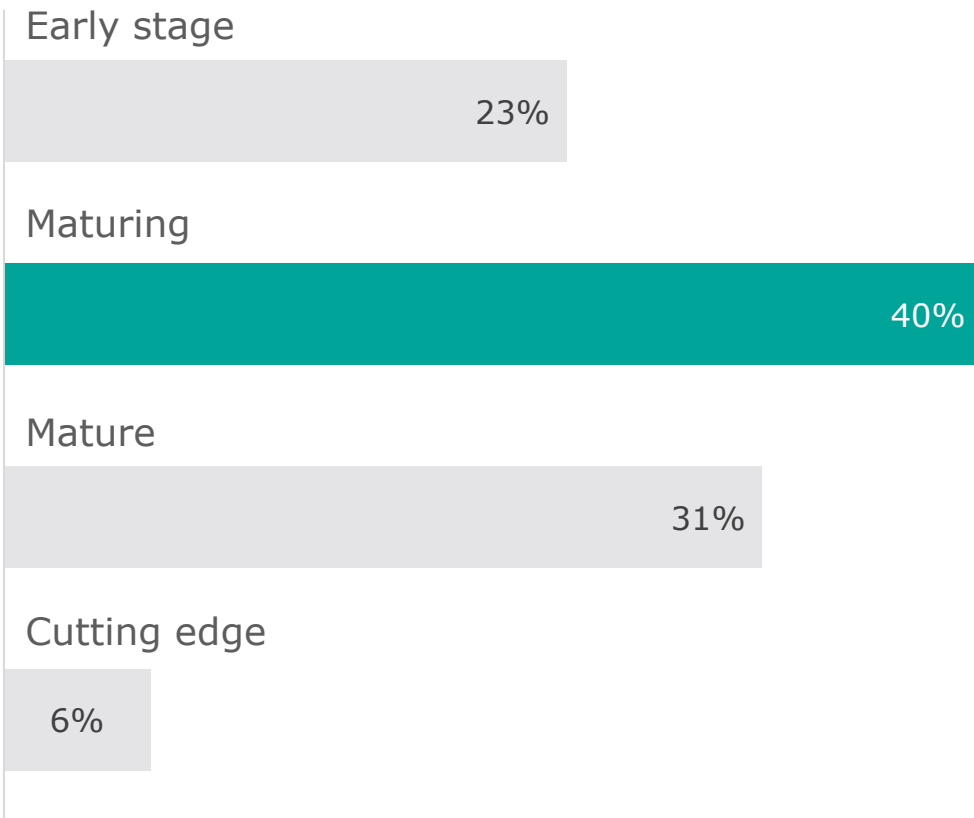
# Legal Operations Maturity Model

## Spend Management



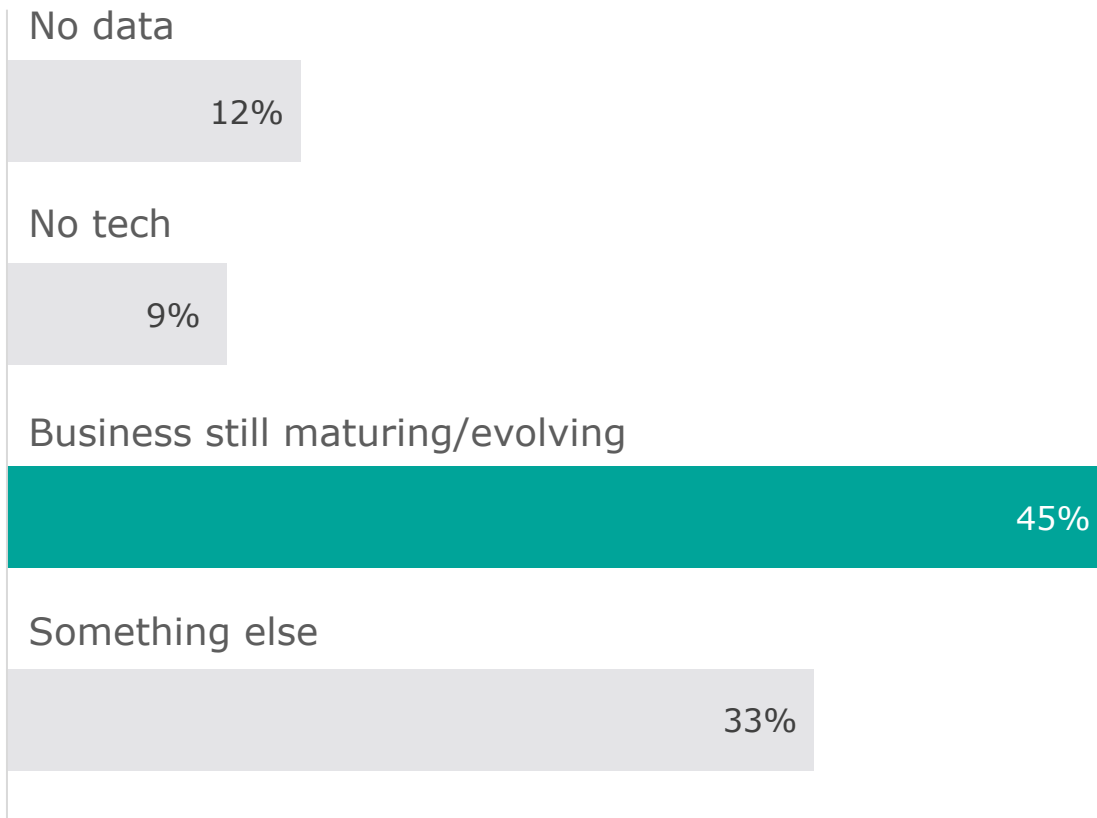
# Spend Management

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# Spend Management

## 2. What's currently holding your team back from improving your department's maturity:



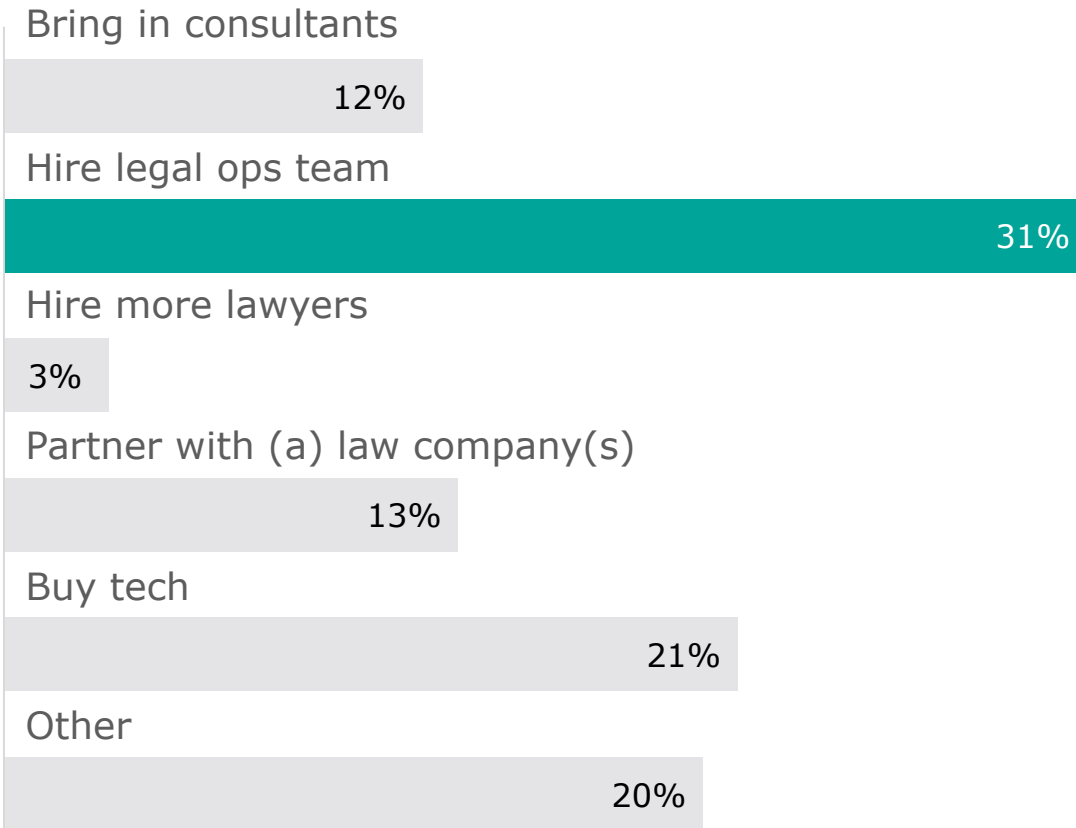
### Explain "Something else":

- We have some data and some useful tech, but there is not enough action based on those learnings.
- There is a lack of meaningful dashboards for insights.
- There is a need for integration with ERP and other systems.
- There is a lack of time.
- We need more people.
- We need dedicated resources.
- Our established law firm relationships are hard to break.



# Spend Management

## 3. What have you done to break through to the next level of maturity:

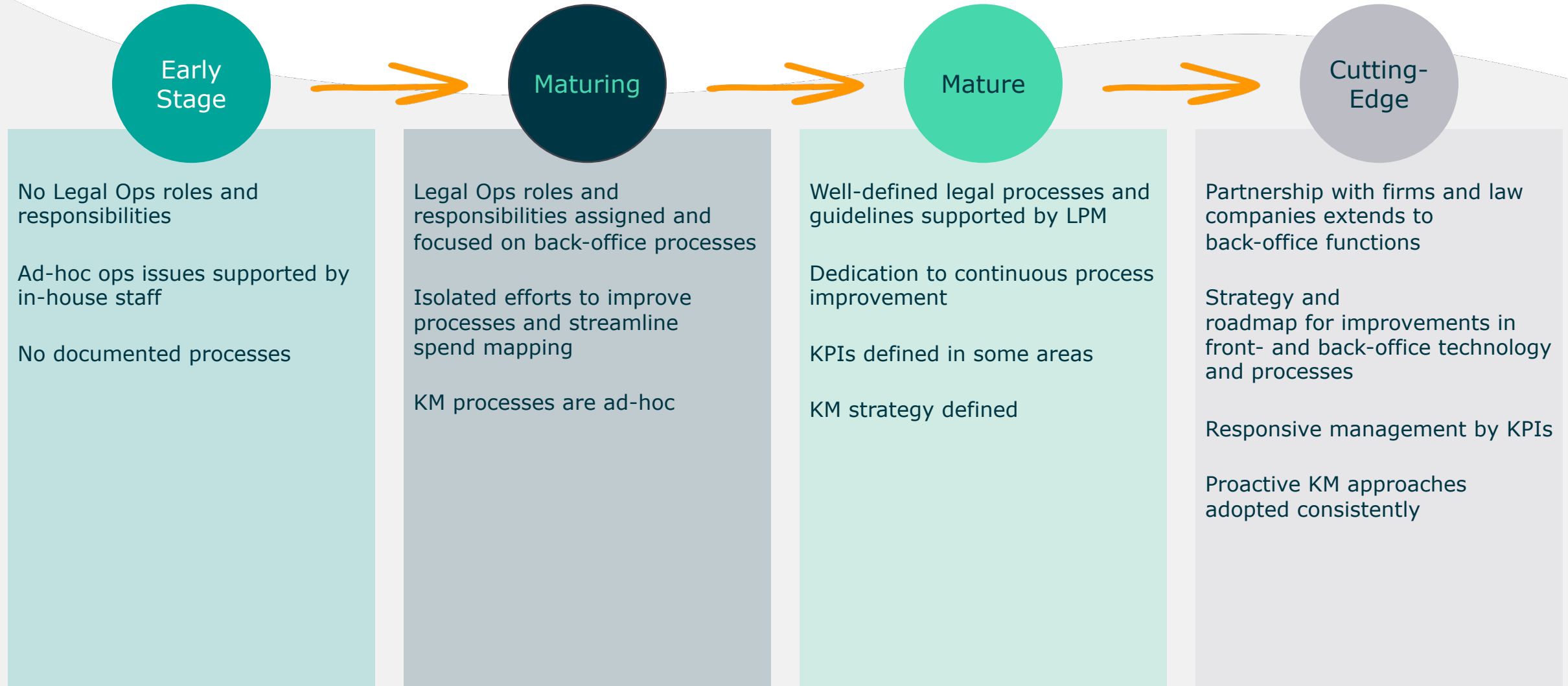


### Explain "Other":

- Our technology allowed for ease of tracking spend, and it was impactful.
- We are looking to buy technology.
- We have visibility into spend, diversity of timekeepers, and AFAs.
- We focus on communication, metrics, and education.
- We have a stronger partnership with our finance and accounting teams.
- We require law firms to input more details into matter intake and budget.

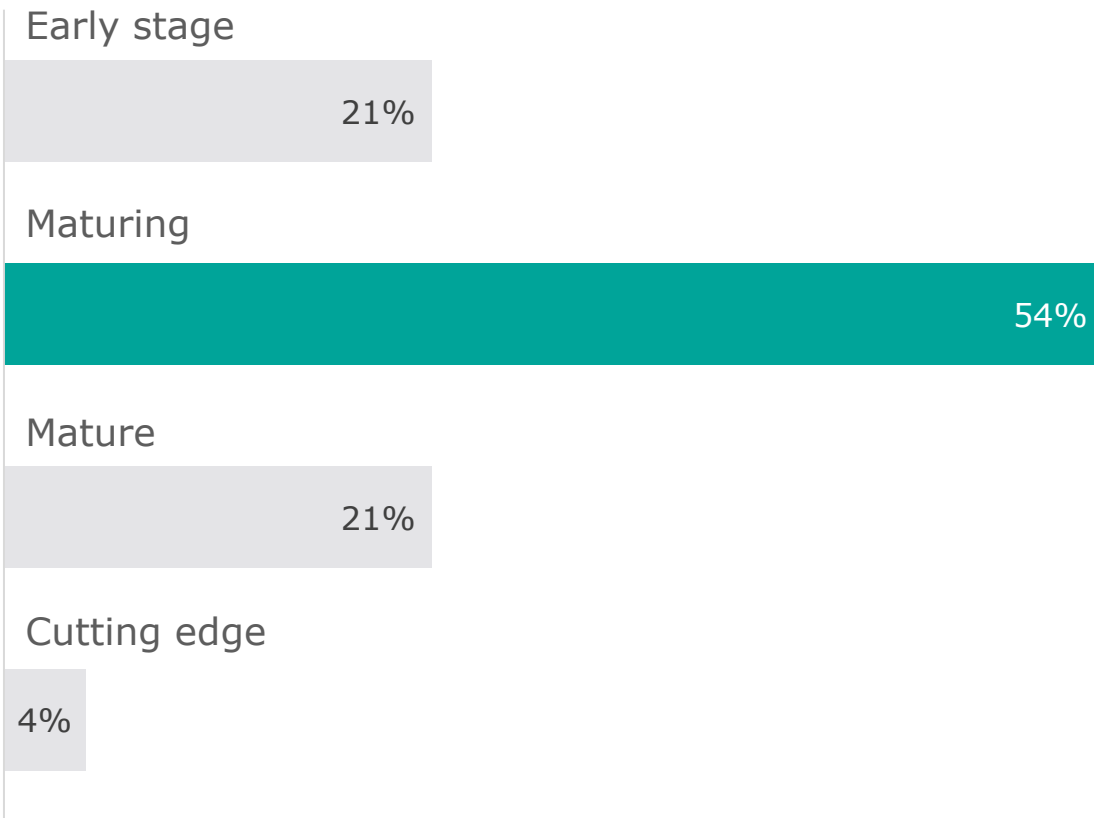
# Legal Operations Maturity Model

## Operations and Infrastructure



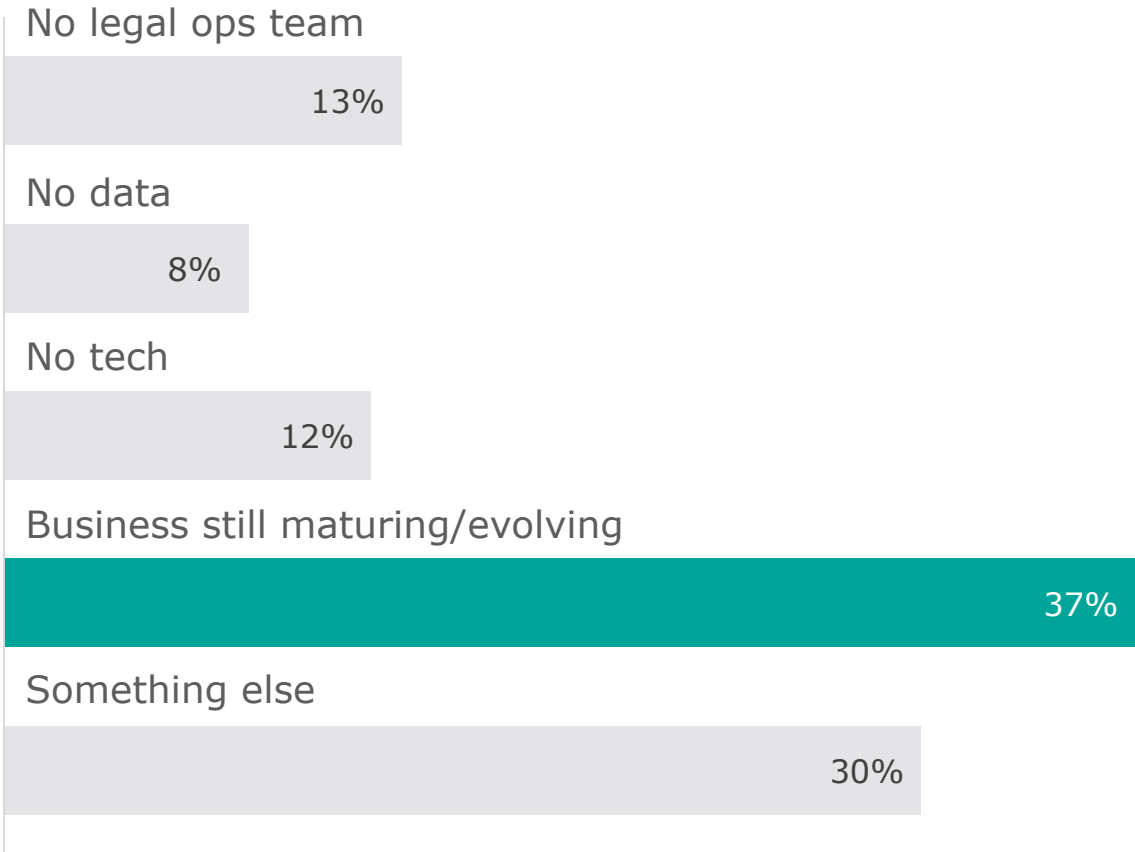
# Operations and Infrastructure

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# Operations and Infrastructure

## 2. What's currently holding your team back from improving your department's maturity:

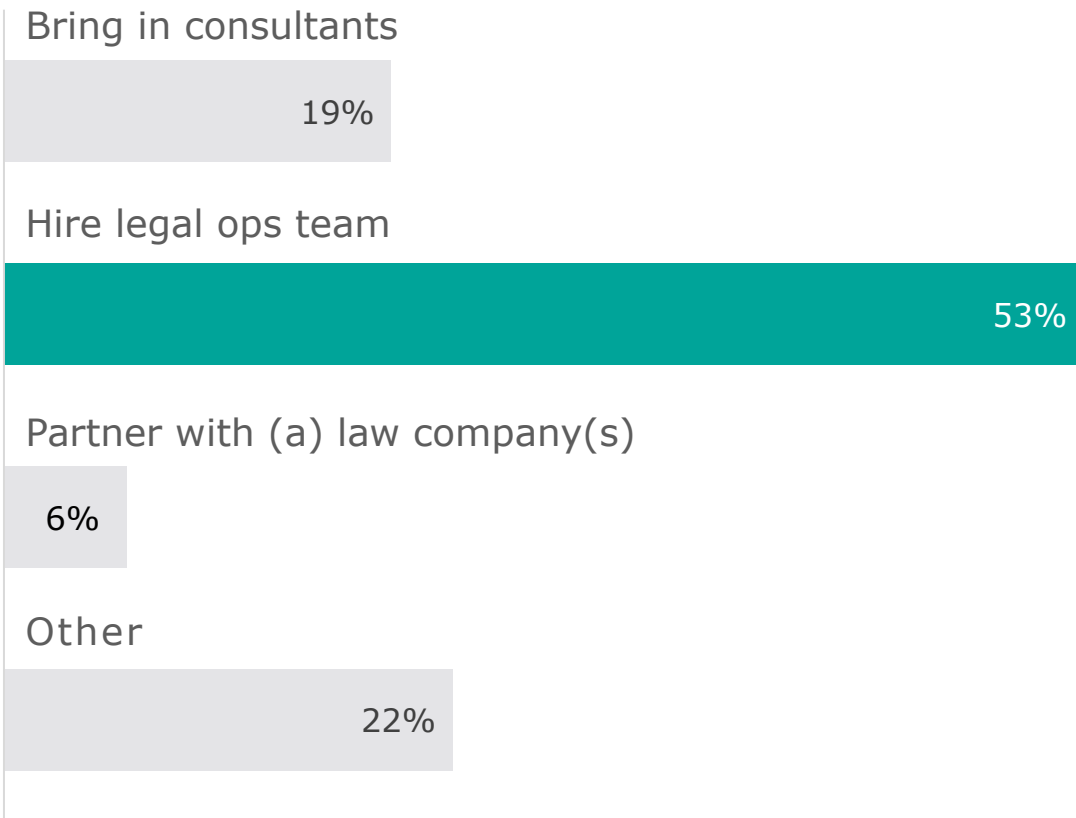


### Explain "Something else":

- There are too many competing priorities for a paralegal to manage.
- The tech is slow on workflow platforms. Coordination across various groups within Legal is lacking.
- We have a small team; there are change management hurdles.
- We are still building data (we only have two years of good tracking, and it requires ongoing input and effort).
- There is a lack of alignment between Legal and business teams.

# Operations and Infrastructure

## 3. What have you done to break through to the next level of maturity:

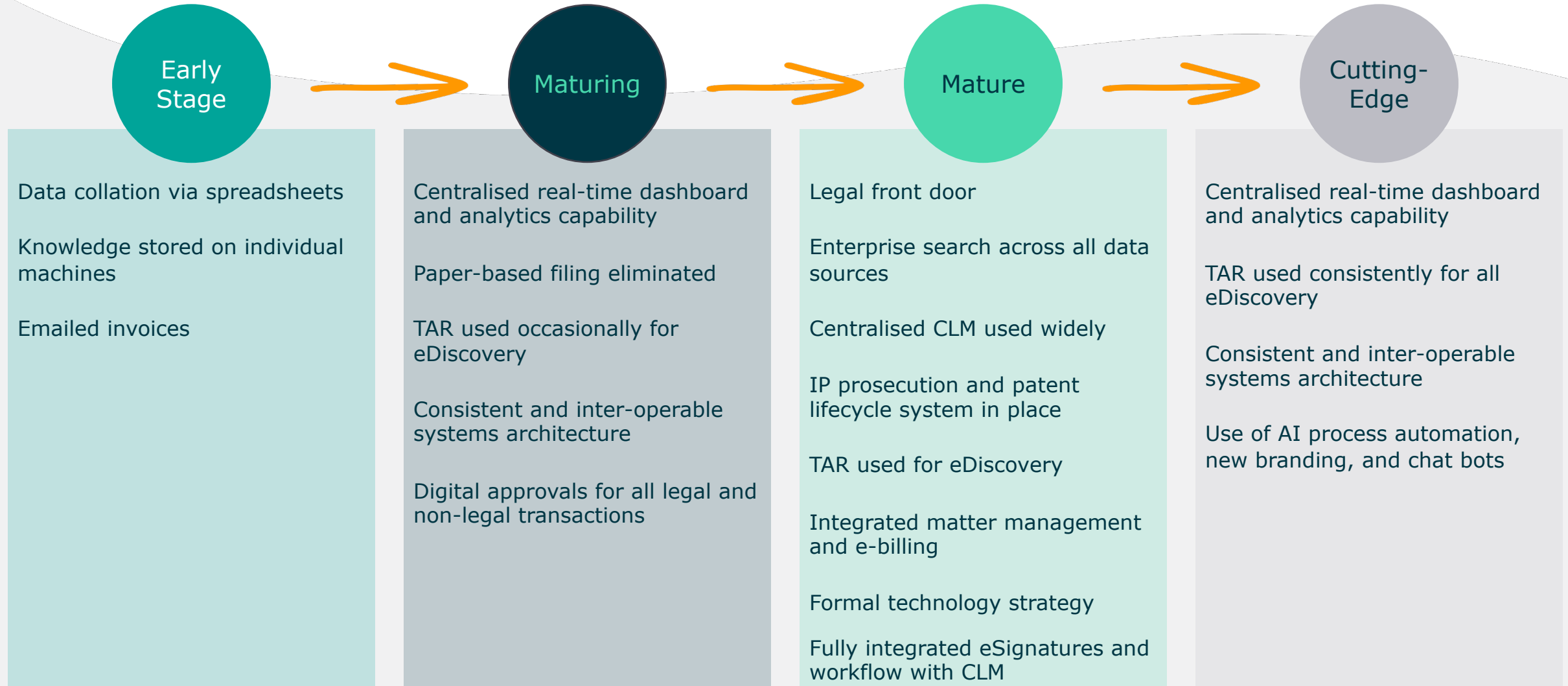


### Explain "Other":

- We have increased education, established metrics, and improved communication.
- We are building a community within the industry.
- We prioritise.
- We task team members with learning how to improve our operations.
- We are involved in more cross-functional meetings.
- We leverage our OC relationships, and we conduct POCs.
- We keep pushing.

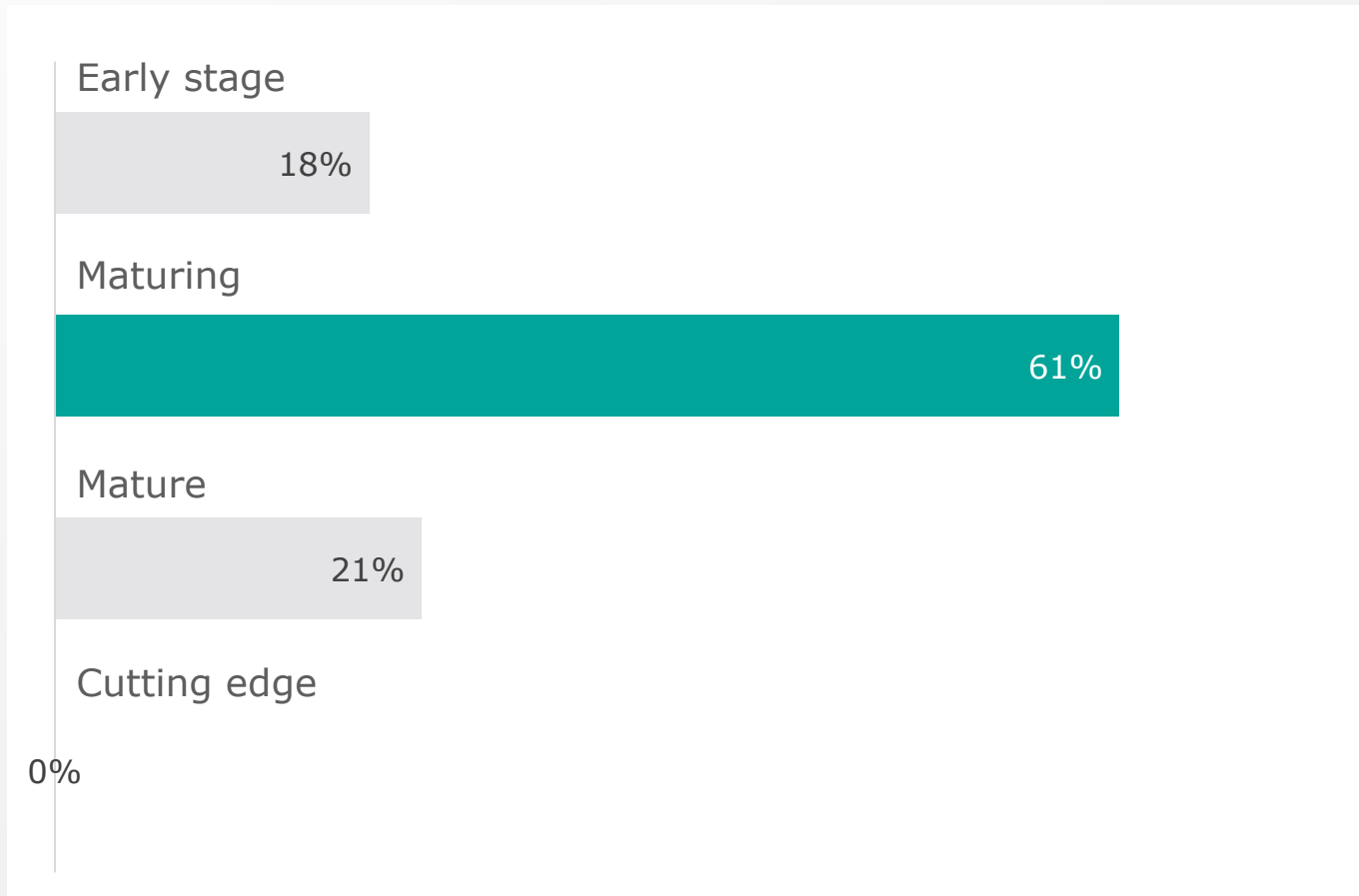
# Legal Operations Maturity Model

## Technology



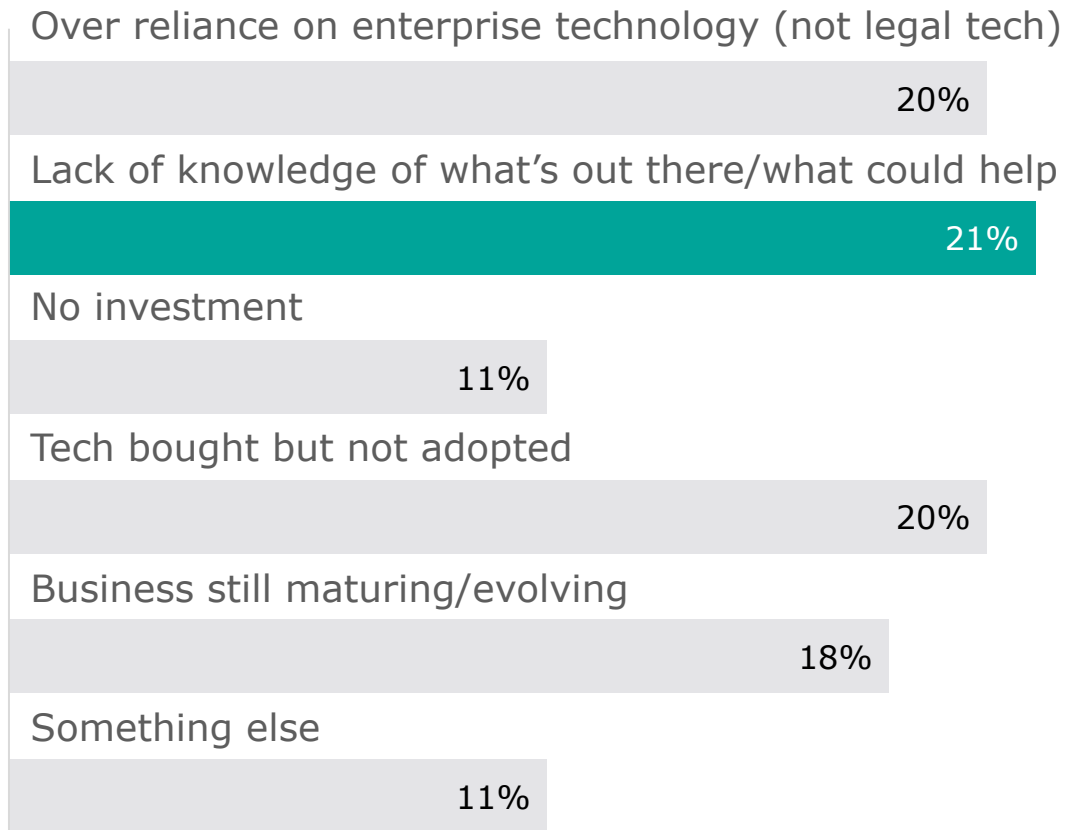
# Technology

## 1. How would you rank your law department:



# Technology

## 2. What's currently holding your team back from improving your department's maturity:



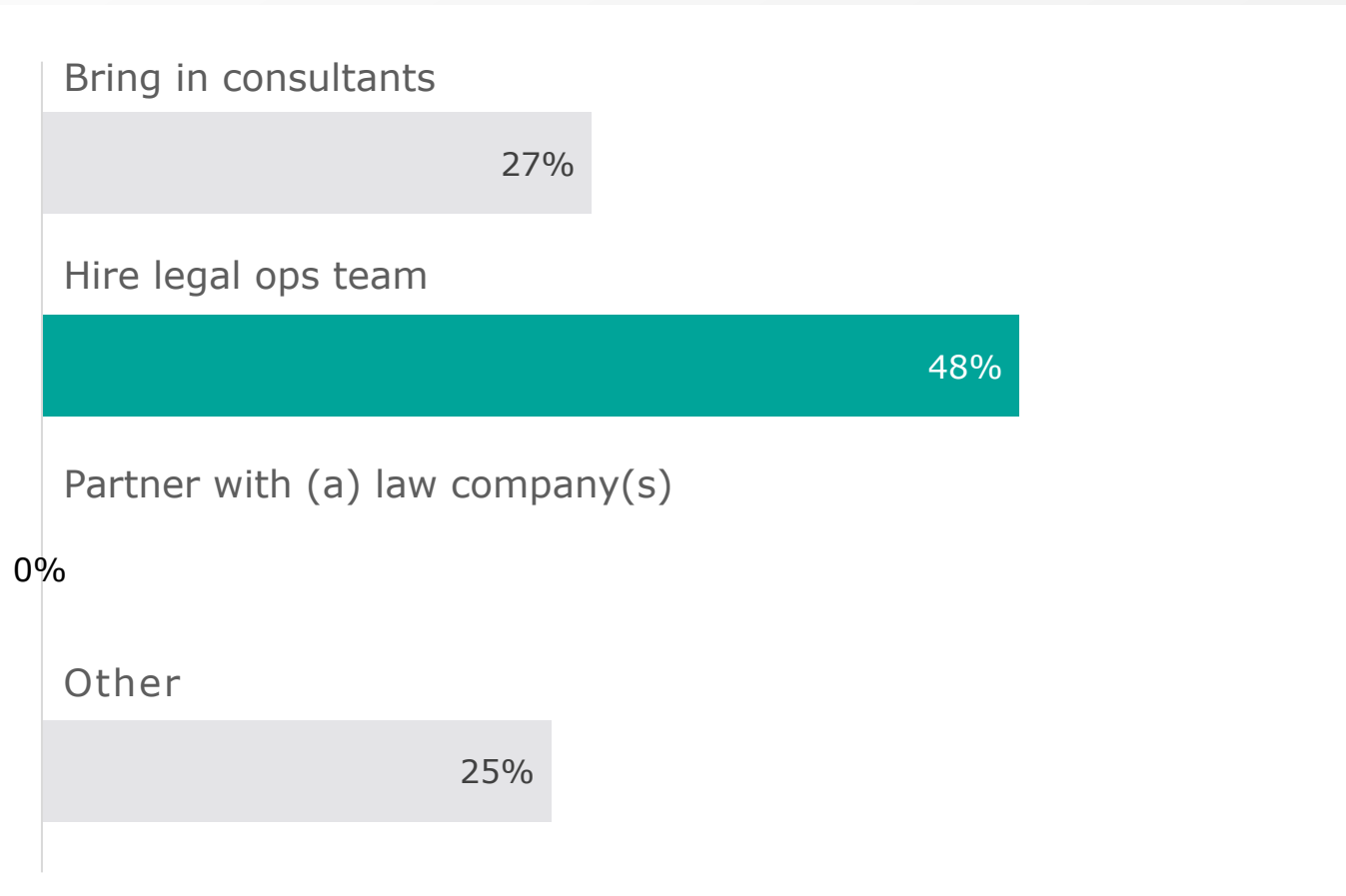
### Explain "Something else":

- We implemented technology but have not aligned our infrastructure.
- Our culture is not aligned, and we use old technology.
- We need to ensure our technology is compatible with other tools.
- We have a "build" instead of a "buy" mentality coupled with a long lag period for development.
- We focus on people and process before tech.



# Technology

## 3. What have you done to break through to the next level of maturity:



### Explain "Other":

- We identified the right tool.
- We work with our technology department to tap into enterprise tech and leverage IT support.
- We improve skills.
- We build community.



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