MITRATECH

CLC

CHECKLIST

Ramping Up Your Legal Operations Team: Your Plan, Process, and Technology Checklist

The steps and resources you need to kickstart — or continue to elevate — your legal operations team and position your department for success.

Executive summary

Today's legal operations teams often find themselves grappling with burgeoning workloads, inordinate amounts of data, and the pressing need to adapt swiftly to the changing needs of their organizations. The truth is, in our shifting market, growth in the legal realm is no longer just about expanding headcounts or acquiring more office space; it's an opportunity to be truly strategic. It's a chance to align the legal function with overarching business objectives, enhance compliance, drive efficiency, and realize substantial cost savings — the possibilities are endless.

There are four basic steps for creating or elevating your legal operations team, beginning with your General Counsel's vision and ending with a roadmap that is executed alongside developments in your organization (and the world).

Understanding the General Counsel's vision

When you start thinking about your new legal operations team, aligning your vision with that of your General Counsel is of paramount importance. What keeps your General Counsel up at night? How is your GC thinking about the changes needed to make your team a center of excellence at your company? Is your GC looking to reinvent the legal tech stack, building from the ground up, or focus on key pain points that will streamline and optimize processes, replacing outdated technology slowly but surely?

In order to make your voice count and your ideas heard, make sure you know how to speak the language of your General Counsel.

Identify the high-impact areas

Begin by identifying the high-impact areas within your legal department. There are the aspects that, when optimized, can lead to significant improvements in overall efficiency and cost-effectiveness.

While high-impact areas can vary from one legal department to another, GCs often point to central functions like e-billing and matter management. These are often considered the "hubs" of legal operations, and leveraging technology in these areas can help create transparency and unity within (and around) your department. If you start here, you can grow and improve on your other pain-points down the line.

Define your Key Performance Indicators (KPIs) and success factors

To measure progress and give your GC a way to track success, it's critical to define KPIs and success factors that align with your General Counsel's vision. What metrics will you use to gauge the efficiency and effectiveness of your legal operations? Do these metrics match up with your GC's goals?

Consider drilling into:

- Outside counsel spend
- Cost per matter
- Cycle time for legal matters
- Compliance rates

Does this sound familiar?

- Outside counsel spend is out of control
- Manual invoicing is error-prone
- Lack of automation makes things time-consuming
- Data is not properly managed
- Your technology stack doesn't feel integrated
- Processes are fragmented
- Law Firm onboarding is painful
- You're Missing proper translation of requirements from the business to IT

Build a blueprint

Create a detailed blueprint for achieving these KPIs.

Ask yourself:

- Do I have a clear picture of the resources, technologies, and strategies needed to bring this vision to life?
- What is the required investment?
- Do I know my expected return on investment (ROI)?
- Am I leveraging different regions of outside counsel to the best of my abilities?
- Are there opportunities to negotiate deals with outside counsel if my e-billing is fully automated?

Get executive sponsorship to drive consensus

You'll have to engage with key executives to secure their sponsorship and drive consensus for your vision – but first, you have to know who should be in the room.

Ask yourself:

- Have I made a list of the stakeholders within my organization who can champion these changes? (More on this in the next section).

Stakeholder analysis: know your team!

When you begin thinking about your stakeholders, remember that you need allies not just in your project, but also beyond implementation. Before you even get started with a steering committee, work together with your neighboring departments – claims and your practice legal team, for example – so that when you do meet pain points in your process, you have a team that understands the importance of your work and can help you get unstuck. By establishing these connections early on, you'll create a network of support that understands the significance of pushing the project forward. And once you have set a solid foundation, you can work more granularly with the stakeholders internal to your project.

- [ ] **Understand your team's structure, roles, and responsibilities**

  Remember: the last thing that the lawyers on your team want is for processes to get in their way. Your technology updates need to be easy to use, self-service, and friendly to non-technical folks.

- [ ] **Create an inventory of user pain points,** including what's working and what needs improvement

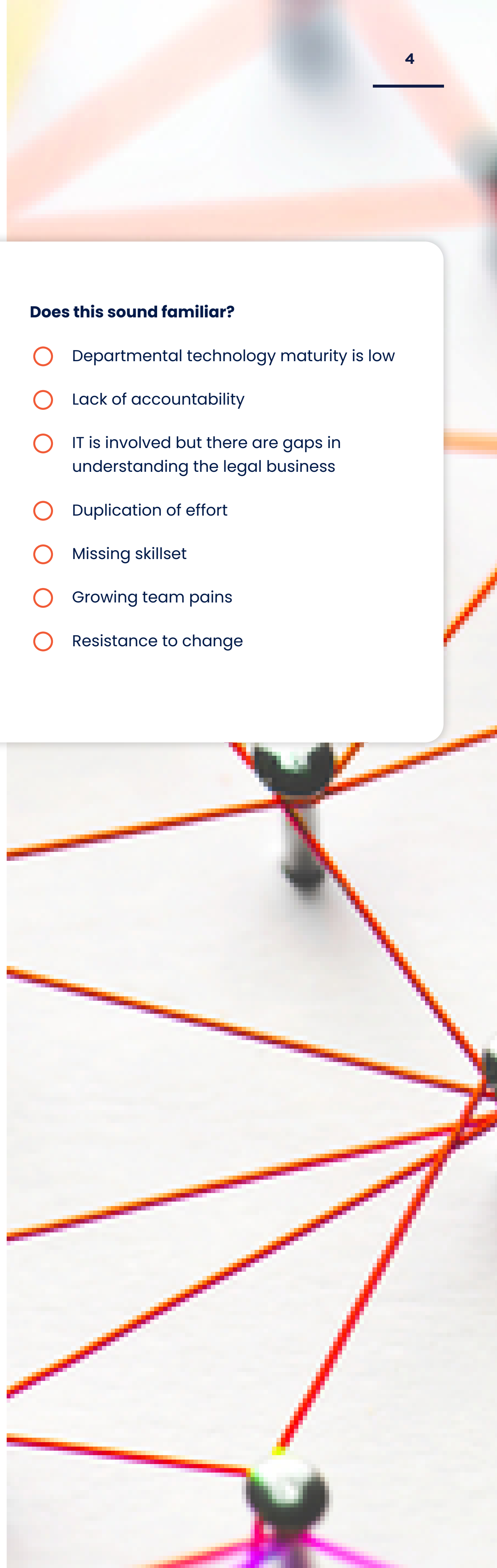
- [ ] **Evaluate team maturity, both from a process and technology perspective**

  If IT is unable to take a significant role in setting you up for success, can your legal team work internally and with user-friendly systems to limit dependence on teams that are unavailable to you?

- [ ] **Assess your organization's current ability to adopt change and identify any potential barriers**

- [ ] **Introduce and manage change, building consensus along the way**

  Start slow, over-communicate, keep your stakeholders involved, and keep the door open for feedback.



Does this sound familiar?

- Departmental technology maturity is low
- Lack of accountability
- IT is involved but there are gaps in understanding the legal business
- Duplication of effort
- Missing skillset
- Growing team pains
- Resistance to change

Evaluate your processes (and the tools that support them)

Evaluating your current processes — and tools and technologies that currently support them — is an excellent way to determine how your team is currently managing legal ops challenges, and where you stand to improve the most.

During the evaluation, look at where data resides, where it is entered, how it moves from system to system, who moves it from system to system, and what kind of reporting is available.

When you process-map your current state you may realize that your processes are so complicated, redundant, and even inconsistent that they call out for a more streamlined, optimized, and automated approach. The good news is, by focusing on the tools and technologies that undergird your processes, and how they support your flow of data, you can find places for improvement and next steps. While a bit painful, this step helps you identify which resources are currently at your disposal and what technology you'll need to bring in.

Evaluate the following:

☐ 1. Current Technology Stack

Keep in mind: how are you aligning your technology and processes with strategic objectives?

Ask yourself:

- ○ Does my legal technology stack center around a single source of truth?
- ○ Do I have a cohesive and integrated set of systems, or am I dealing with disconnected, siloed technologies?
- ○ Do I rely heavily on Excel-driven reporting due to limitations in my existing systems?
- ○ Is there a centralized and integrated view of legal matters, or do I lack a matter-centric view in my technology ecosystem?

☐ 2. Level of Automation

Keep in mind: how are you exploring ways to streamline and automate legal processes?

Ask yourself:

- ○ How much repetitive, manual labor is needed in a typical matter lifecycle, or in the current e-billing process?
- ○ Do I have clear processes in place to drive automation?
- ○ Do I rely on code-heavy, complex systems that require extensive IT involvement, or can my business users make the changes they need?

☐ 3. Data Qualification:

Keep in mind: what data is important, where is it stored, and how is it managed? Are there strategies to enhance data management, quality, and accessibility?

Ask yourself:

- ○ Is there evidence of data redundancies and a serious lack of data quality within my legal data repositories?
- ○ Where is my data stored? Are important data assets scattered across various systems, making data management challenging?
- ○ Who stores my data, and who has access to it?
- ○ Is Excel the primary tool for reporting due to limitations in my data management systems?
- ○ Do I have a centralized, integrated approach to managing and accessing legal data, or is it dispersed and disconnected?
- ○ What kind of reporting is possible on my data?

How do you manage your information governance?

Data within the legal department should abide by the same guidelines and policies as your company –so you should work across departments to manage compliance.

Check me off:

How many definitions of legal spend does your team have going into the current state step? How many definitions do you have once this step is complete? If done correctly, the answer should be one!

Execute and evolve!

Create a technology roadmap

Choosing your systems and tools with speed and flexibility in mind helps teams manage big projects while staying ahead of legal's ever-changing landscape. On the one hand, teams require platforms that manage overarching projects and lifecycle management, but on the other hand, strategic teams demand easy-to-update platforms and tools that let them make changes on the fly. How do you know which system to choose, and how do you set your team up for a successful implementation?

- [ ] **Prioritize centralized and integrated system architecture**
    - Look for a platform that offers one holistic view of data, cross-functional analytics, and flexible industry integrations
    - Choose best-in-class, scalable technology for each area (Matter Management, Contract Management, etc)
- [ ] **Build zero-code into your team DNA**
    - Zero-code platforms provide the flexibility to adapt and modify processes without heavy reliance on IT support, empowering your team to make real-time changes and optimizations
- [ ] **Propose realistic execution timelines**
    - Run quick request-for-proposals, line up vendor demos, and get experts involved in selecting the right technologies
    - Use a "Quick Deployment" mindset for each selected system. Remember: Deploy and then expand/enhance
    - Implement fast, no-code solutions that are ready in days or weeks with bigger implementations that will change the way your team stores data
- [ ] **Hire the team**
    - Build in-house expertise with seasoned legal operations professionals, and use your reporting to better understand which outside counsel are providing the best and most cost effective support
- [ ] **Focus on process**
    - Remove inefficient processes, replace them with best-practice-based processes, and introduce new processes that focus on driving efficiencies

Conclusion

Strategic legal operations leaders know that success lies not just in making a plan, but in the capacity to adapt dynamically.

Technology plays a major role in enabling this flexibility. The right tools empower your team to make informed decisions, adapt swiftly, and fine-tune processes in real-time. Uniting all stakeholders behind a shared vision is key to a successful plan and its implementation. Remember: setting your legal ops team up for success is not only about the legal professionals; it encompasses your technology experts, leadership figures, and every contributor in between.

Transform legal efficiency and performance with market-leading Enterprise Legal Management (ELM) solutions.

Explore Solutions ▶

MITRATECH