

Speaking the Language of Your Legal Operations Stakeholders: **Your GC, Internal Team, Partner, & Vendor Checklist**

Tips for engaging the right legal ops stakeholders
— in the most strategic way.



Introduction

In our [Plan, Process, and Technology Checklist](#), we talked about the tools and best practices needed to position your legal department for success — and step #1 was aligning with your key stakeholders.

It's a time of overflowing workloads and limited resources, where more data than ever before is at our fingertips, and new ways of working and collaborating are emerging to help teams meet current and future demands. Focusing attention on the stakeholders that help define and ensure success will be essential as your legal ops continues to scale. Knowing who to talk to and what to ask ensures that your plans can meet company-wide goals and roll out without a hitch.

To continuously improve on your successes, you must first understand your company's vision, shore up support, investigate challenges, and deliver solutions. Not to mention, you need to ensure that your success is clear for your stakeholders.

Empowering, automating, and elevating your legal operations team and technology will always begin with having the right conversations with the right people.



Checkpoint #1: Checking in with Your General Counsel (GCs)

Understand Priorities and Goals

Start by having an in-depth conversation with your General Counsel (GCs). In our [Checklist](#), we identified what business challenges keep GCs up at night and which KPIs will help communicate your successes. Here, we focus on a different aspect: understanding how to effectively align with your GCs' vision and priorities, which will be drawn from the larger leadership team and company mission. By aligning with the Office of the GC, the legal ops team ensures their efforts are in harmony with the overall direction of the company.

"It all starts with understanding what your company is aiming towards. Does your company have a set of goals across the whole organization? And then: how are you in legal or legal operations helping drive your department towards those organizational goals?"

– **Jessica Vander Ploeg**,
Vice President of Legal Operations at Belron
[Tune in for the full conversation.](#)

When you talk to your GC, make sure to ask:

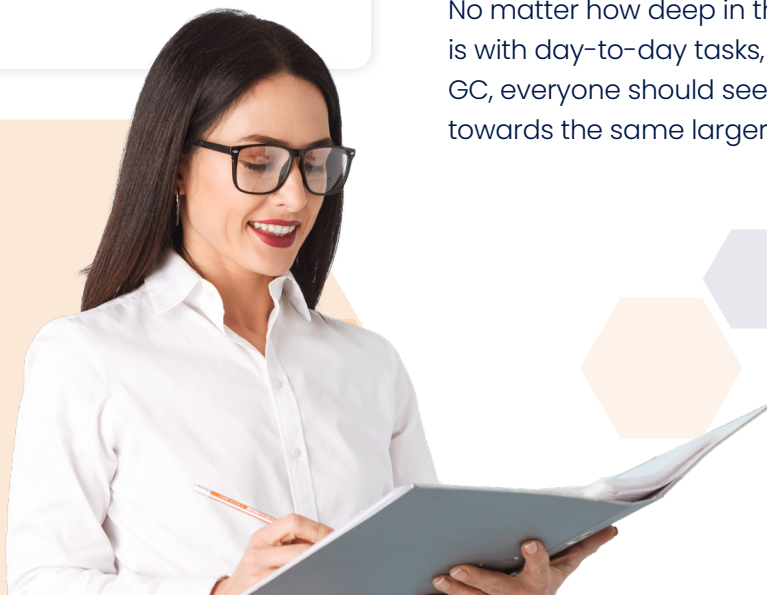
- ☐ What exactly does success mean to this General Counsel?
- ☐ What does success mean for our larger legal operations department?
- ☐ What is the bigger picture – the "north star" – that your GC wants to guide you towards?
- ☐ How does your GC want this success reported?

Translating your company's "north star" into your team's charted course can mean many different things. For example, if your company's goal is to increase revenue by 20X by a certain date with a new key innovation or initiative (like a new product that handles personal information), legal will need to support this from a contracting perspective and with guidance on laws and regulations.

Consider the following:

- ☐ Is my legal service delivery model as efficient as possible?
- ☐ Do I have a plan to manage my internal team?
- ☐ What kinds of external resources will I need?

No matter how deep in the weeds your team is with day-to-day tasks, after aligning with your GC, everyone should see how their work aims towards the same larger goal.



Checkpoint #2: Understanding Your Internal Teams' Pain Points

Diagnose and Address Challenges

Areas of improvement are found when you take the time to examine your team's day-to-day activities and pain points. For instance, attorneys swamped with sales contracts might be tangled up in NDAs, procurement agreements, and contract approvals that could easily be streamlined or automated. If your lawyers are too busy or overwhelmed to move swiftly in one area, ensure you've pinpointed the real issue before offering a solution.

"This is kind of a soapbox of mine — understanding the business process, and learning the business process the right way before you get started is essential. You have to make sure that you actually get the right people involved, and you need to shadow them. To be successful and roll out workflows quickly, you need to understand your current state to get to your future state."

– Julie Richer,
Director of Legal Operations,
Bath & Body Works
[Read the Case Study](#)

Identifying Pain Points That Are Ready for Automation

When searching for your first few quick process wins and improvements, remember to ask:

- ☐ Is this bottleneck a one-time issue, or does it come up daily/weekly/monthly?
- ☐ Is your process high volume and high touch with predictable variations?
- ☐ Does your process include endless back-and-forth emails?
- ☐ Do your processes pull together hard-to-find information that you need to have audit-ready?

Do you know when to use workflow automation? [Download the Guide.](#)

Checkpoint #3: Partnering with Other Departments

Leverage Cross-Departmental Synergies

Legal departments are intricately connected with various other functions like Sales, Procurement, and more. And when you can align your team's goals with the company-wide mission, you'll often find that the "north star" is imbricated in the work of other departments, too. So when talking about shared challenges, remember that efficient processes in legal departments don't have a siloed impact — they can help close deals faster, improve relationships, enhance compliance, and more. The departments you work with may need education in order to understand how legal can better partner with them and elevate the company as a whole.

To effectively communicate your goals and learn from your colleagues, consider:

- ☐ **Talking to employees in other departments to see what your processes look like from the other side.** Do sales people know where to ask for legal advice, and are pre-approved contracts ready for their download and send, or do they rely on back and forth between themselves and legal?
- ☐ **Engaging with IT.** Are you working together to both ensure that your roll-outs are properly tested and QA'd, while also using self-reliance to lower their labor overhead?
- ☐ **Developing metrics** to measure the impact of legal processes on other departments' performance.
- ☐ **Using these metrics to continuously improve** and demonstrate the value of the legal department's contributions.



Don't Forget: Collaboration with IT is crucial, especially in the era of digital transformation. With certain solutions, such as [workflow automation](#), legal teams empower their own employees to build the solutions for the challenges they face. In doing so, teams benefit from faster ROI, more control over their final product, and the ability to make changes as needed – without submitting a ticket.

Checkpoint #4: Engaging Your Vendors, Partners, and Consultants

After you have worked with leadership to identify your company's goals — and seen the problem in action in conversations and walk-throughs with your colleagues — start thinking about your technology providers and consultants. No matter what challenge your team faces, your technology solution should fit well into your larger [ecosystem of legal operations tools](#). Consider leveraging current vendors across your tech stack through integrations and best-in-class analytics that measure more than just one product. Your legal technologies should help you manage new challenges while reducing redundancy and siloes.

The best partners will prioritize your pain points and offer configurable, customizable solutions. When there are gaps, they will look to client feedback to develop their roadmaps.

Don't Forget: If you rely on single-service vendors or quick-fix point-solutions for short-term relief, you'll be setting yourself up for long-term tech bloat.



When you are talking to vendors and partners, internally or externally, remember to:

- ☐ Review multiple software options (internally too)
- ☐ Talk to industry peers
- ☐ Get AND check references
- ☐ Ask for ROI help from a service provider
- ☐ Custom tailor the ROI to your company/firm
- ☐ Vet the solution with your internal security team

Your GC, Your Teams, Your Vendors – Again!

Each of your stakeholders will want to have more than one conversation with you. Discovering your company's – and your team's – "north star" is not a one-time event. Instead, every conversation is one you want to return to again and again, each time with newer and more specific questions and metrics.

After implementing a project and gathering metrics, talk to your GC again.

- ☐ What do your metrics mean, and how can they drive more success?
- ☐ Does the leadership of your organization understand how you have contributed to their goals, and will they support your future moves?

Talk to your teams again. Show them the numbers on how your new processes have saved money, time, and improved compliance.

And don't forget: stay with the trouble.

- ☐ Are there ways these processes can continue to improve?
- ☐ Are there small adjustments? Big adjustments? New challenges to tackle?

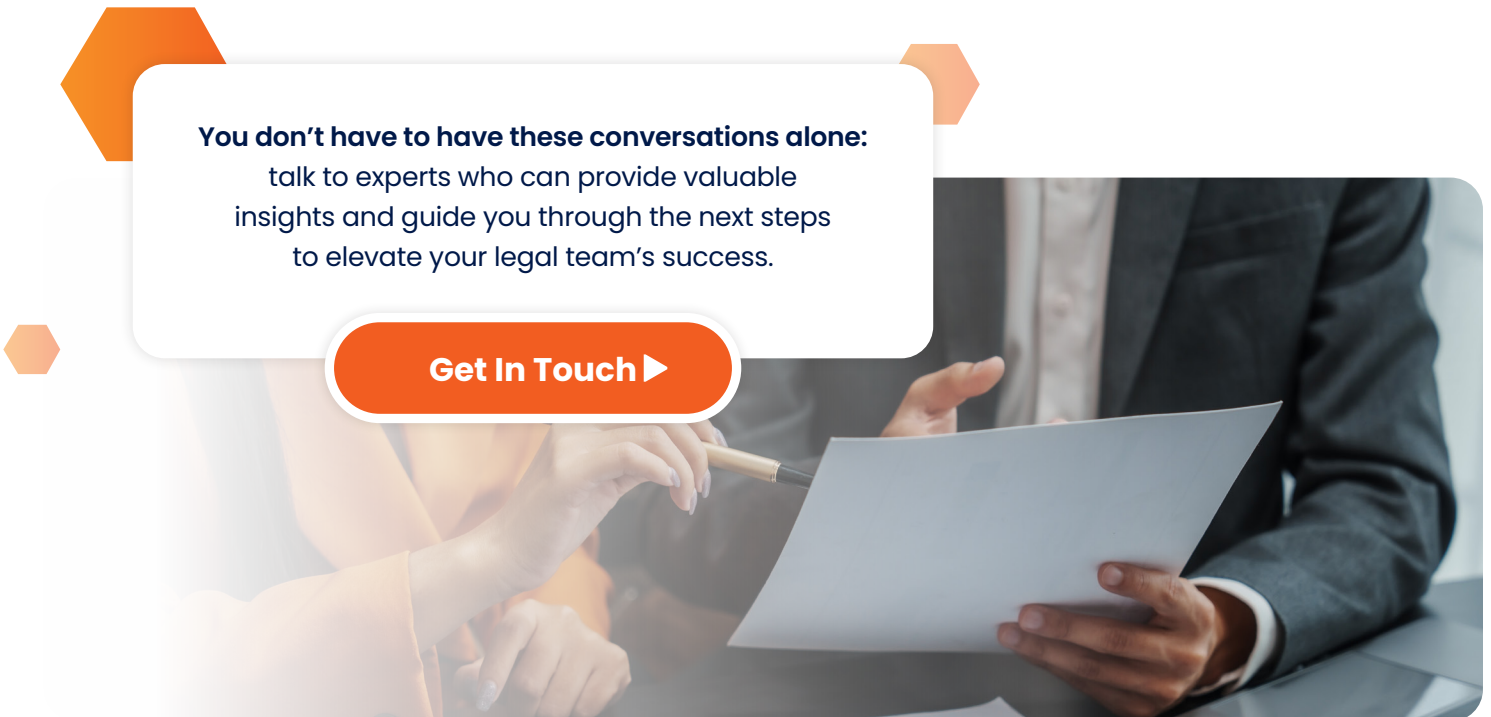
To make the most of your relationships with your vendors, stay up to date with their newer features and advocate for the features you want to put on the roadmap. Join industry conversations through vendor networks to lead the field of legal operations.

By prioritizing stakeholder engagement, you can ensure your legal operations are aligned with company goals, helping you effectively address pain points and leverage the right technology to do so. Engaging in meaningful conversations with your GC, team members, and vendors will foster collaboration and innovation.

You don't have to have these conversations alone:

talk to experts who can provide valuable insights and guide you through the next steps to elevate your legal team's success.

Get In Touch ▶



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