

## Job Description:

# Legal Operations Senior Director or VP/Chief of Staff

### Primary Function

This person is responsible for the day-to-day operations of the COMPANY Legal Department, and reports to the General Counsel. Acting as an interface between the general counsel and the legal department system-wide, this position coordinates activities such as the annual operating plan and department budgets, hiring and recruiting, as well as other activities and projects as assigned by the General Counsel. The candidate selected for this role will offer a deep understanding of the legal function and expertise in in the implementation of policies, processes and technologies to increase value of the Legal Department while fostering a connected team culture. In addition, this position assumes responsibility for leading law firm and third -party vendor negotiations, developing pricing strategies, conducting RFPs (Request for Proposals), tracking and coordinating outside counsel fee arrangements and driving other cost control initiatives.

The ideal candidate will be someone who has managed direct reports in both cross-functional and cross-geographic teams, has a significant pricing background and expertise, has extensive negotiations experience, is customer service-focused and detail-oriented, and has the diplomatic presence to handle sensitive discussion with both team members and senior outside counsel partners. This person will be encouraged to innovate and build upon current processes, working closely with the senior attorneys in our legal department. To succeed in this role, the candidate will need a can-do attitude and be able to multitask efficiently and effectively to manage competing priorities. The person in this role provides critical infrastructure, which enables the legal organization to meet its business priorities. The primary functions for which this person is responsible are Strategic Planning and Execution, Finance and Budget Management, Legal Information Technology, E-discovery and Records Management, Outside Counsel and Legal Vendor Management, Pricing and Negotiations, and Communications and Administration.

### Strategic Planning and Execution – 10%

- Responsible for developing, refining and promoting the legal department's mission, and developing and executing on the department's short and long term operations plan
- Provide creative thinking to help identify and develop cutting-edge strategies for increasing value and reducing outside legal spend while maintaining excellent legal representation and optimizing engagement practices with our law firms
- Responsible for other strategic plan or initiatives as delegated by the General Counsel
- Create metrics and monitor progress to measure success against strategic plans

### Finance and Budget Management – 20%

- Develop and manage the Legal annual operating plan and all department budgets
- Lead the strategic planning process to determine future headcount and spend by practice and site. Works as a primary interface between the legal department and finance
- Identify, collect, and report on key performance indicators and metrics on a global basis that are meaningful and relevant in ascertaining the legal team's budget management performance
- Responsible for Legal Operations benchmarking initiatives, including spend analysis, efficiency initiatives and technology

### Legal Information Technology – 20%

- Assess all department resources related to matter management, knowledge management, eDiscovery, document management, and billing management, then implement best in class technology, systems and processes
- Develop the IT architecture and strategy for the delivery of global IT solutions to the department; work with IT to choose and implement applications; ensures systems run smoothly for the matrixed organization

- Partner closely with our e-Billing administrator on process improvements and system enhancements. Able to demonstrate mastery of e-billing system as well as the ability to write detailed reports within the software tool
- Responsible for department websites and all knowledge management tools and processes including development of new technology solutions to further enhance Legal Department collaboration and efficiency
- Responsible for staying up-to-date on legal tech and assessing other tools which may include contract management, content management, IP management, business process management, e-signature, board management, eDiscovery, litigation hold, compliance management and subsidiary management

#### **E-Discovery and Records Management – 5%**

- Work with the e-discovery vendor to implement a phased rollout of an efficient e-discovery process to include both in-house resources and vendor, legal holds and document review management
- Develop, track and improve efficiencies, processes and cost controls of e-discovery and records management platforms
- Manage and continuously improve the document management system across the entire department

#### **Outside Counsel and Legal Vendor Management – 20%**

- Lead the law firm and third-party vendor management programs with the aim of reducing spend, maximizing value, and improving predictability
- Conduct RFPs where appropriate
- Create a tracking system that will provide quick access to data on each engagement and pricing model
- Manages relationships with law firms and other outside vendors
- Pricing and Negotiations – 15%
- Develop pricing models and templates for use across the department
- Develop creative matter-specific fee arrangements in partnership with managing attorneys
- Negotiate fee arrangements with outside counsel firms and third-party vendors
- Create data and reporting processes to monitor pricing performance and savings

#### **Communications and Administration – 10%**

- Stay abreast of industry trends, analyze outside counsel billing practices against in-house guidelines, and maintain an updated outside counsel guidelines document and related tools.
- Identify and track department metrics for each practice area, as well as cross functional initiatives
- Work with GC Staff to ensure the Legal Department's workflow is aligned to priorities and to identify solutions to increase overall efficiency
- Proactively look for opportunities for overlap and duplication throughout the department, ensuring the use of the most efficient best practices
- Work cross-functionally with professionals in Legal, Finance, IT, and others
- Manage new hire onboarding processes for the legal department;
- Recruit, select, train, appraise performance, and administer salaries of reporting employees
- Oversee development and implementation of department policies and trainings
- Manage the department's linkages with HR, IT and other University Functions, helping to implement University initiatives and minimize attorney time spend on such initiatives
- Develop and implement the department's strategic communications plan; ensures communications goals support department objectives; measures effectiveness and relevance
- Responsible for department communications such as newsletters, announcements, and messages from leadership team
- Coordinate quarterly department meetings and cross-department training opportunities, facilitate education on best practices, and create department-specific guidelines and policies
- Plan GC Staff Meetings by developing agenda with GC and leadership team, records notes and action items in each meeting, documents and follows up on action items between meetings
- Perform special projects and responsibilities assigned by the General Counsel



## Job Requirements

- Bachelor's Degree required preferably in Business, Finance, Information Technology or equivalent combination of education and professional experience, MBA preferred
- 10+ years of total work experience in operations, five years in legal operations, billing and pricing, and five years managing direct reports
- Executive management experience and experience working with senior executives
- Executive leadership and proven track record of making an impact, developing and executing on strategies and delivering superior results in both the short and long term
- Demonstrable experience with alternative fee arrangement cost modeling
- In-depth understanding of law firm billing, pricing and compensation practices.
- Strong understanding of litigation/transaction matter lifecycles
- Attention to detail with excellent time management and multitasking/prioritization abilities
- Technology-savvy; proficient in all Microsoft Office applications, especially Excel; expertise with e-Counsel billing software
- Has excellent interpersonal skills; comfortable dealing with all levels of our organization
- Proactive approach to recognizing needs, solving problems, anticipating issues.
- Proven negotiation skills with senior partner level outside counsel attorneys and pricing directors of law firms. Demonstrated track record of influencing senior level stakeholders (both internal and external).
- Excellent written and oral communication skills. Strong ability to communicate concisely with a wide variety of audiences, including senior management and key external stakeholders and proven ability to engage, influence and align stakeholders
- Well organized, able to prioritize well, work efficiently. Shows flexibility as workloads fluctuate.
- Consummate team player with excellent judgment
- Demonstrated ability to build and lead a complex function; influence and leverage others in a large, global organization in order to achieve objectives; and execute projects
- Capacity to think strategically to identify issues and develop long-term solutions
- Ability to handle multiple assignments and manage major projects to successful completion
- Demonstrated project management skills
- Demonstrated success managing, leading and coaching employees

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## About UpLevel Ops

UpLevel Ops leads the evolution of the legal operations practice.

We are trusted advisors providing practical guidance, mentorship, and coaching that goes beyond consulting. With our custom, high-end service – born of extensive corporate in-house experience – we partner with clients to craft actionable solutions. We create a roadmap to success that empowers teams with best practices, tools, and workflows tailored to their unique business objectives.

For more information about UpLevel Ops, please email us at [info@UpLevelOps.com](mailto:info@UpLevelOps.com) or you can discover more at [UpLevelOps.com](https://UpLevelOps.com).

