



Outside Counsel Management & Scorecards

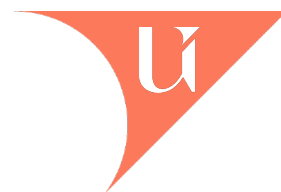
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Good Outside Counsel Management...



- Benefits both the law department and its most trusted law firm partners
- Maximizes value of every dollar spent, rather than simply reducing the number of dollars spent
- Uses technology and AI thoughtfully to improve quality, efficiency and value
- Involves a simple layer of intelligence and analytics at every stage of the lifecycle
- Focuses on repeatability of process as much as it does on the results it produces



Use QBRs to Manage Quality



What Exactly Is a QBR?

- Quarterly Business Review, though they often become Annual Business Reviews, depending on how frequently they're performed
- What does success mean? Define it!
- Practical Advice
 - It takes lots of time and resources to put together a QBR deck
 - Start small and with your most important partnership
 - Legal Ops provides the majority of the metrics despite inviting collaboration
 - QBRs are not just a meeting
 - Take time to brainstorm, together



Getting Monitoring Right

- Lots of programs aim for visibility, but the right **type** of visibility is important to strengthen trust / relationships



vs.



The Judicial Approach

- One-sided
- Specific to only a few metrics that highlight lack of firm efficiency
- Matter spend focused

The Partnership Approach

- Both sides driven / accessible
- Transparency into various metrics beyond just firm efficiency
- Matter outcome focused

Focus on continuous improvement, innovation and shared efficiency

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In-house survey of Outside Counsel

- How well did OC demonstrate subject matter expertise?
- How well did OC demonstrate knowledge of our business and goals?
- How responsive was OC?
- How well did OC project manage?
- How accurate was OC on budgeting and fees?
Did they follow Outside Counsel Guidelines?
- How innovative/creative was OC
 - On their delivery?
 - On their fee arrangements?
 - On technology & use of AI, including whether efficiencies were reflected in staffing, hours, fees, or AFAs?
- Did OC meet our diversity guidelines?
- How proactive was OC to complete matter work?
- How aggressive was OC to resolve the matter?
- How well did OC communicate their guidance?
- How well did OC gain our trust based on guidance?
- How well did they gain our trust based on their interactions?
- How good was the quality of work?
- How well did they achieve the outcome?



Outside Counsel survey of In-house Counsel

- What did you do for our company last year?
 - What was your total spend last year?
 - What went well, what didn't work well and how can we help?
- Is in-house counsel engaging your firm at the right moment/time?
- How do you think the matter was handled (project managed) in-house?
- How clear does in-house counsel convey the scope, instructions and goals?
- How responsive was our in-house counsel to your needs?
- How knowledgeable was our in-house counsel team managing the work?
- How well did in-house counsel provide access to the necessary stakeholders?
- How well did in-house counsel communicate financial/budget requirements and constraints?
- How well did in-house counsel manage the invoice payment process?
- How well did in-house counsel communicate gaps and issues throughout the course of the matter?
- How likely is your firm to pursue supporting the company in the future?
- How comfortable are you with the pricing models and rates that have been agreed to?
- Has in-house counsel provided clear guidance regarding the appropriate use of AI, including any confidentiality, data security, or approval requirements?



Sample OC Performance Scorecard

FIRM NAME

FEEDBACK BY

MATTERS HANDLED LAST YEAR

FEES & ADMINISTRATION

- Budgeting and fee accuracy
- Satisfaction with hourly rates
- Timely and reliable invoicing
- AI/technology used to improve efficiency and reduce time/cost
- AI-enabled efficiencies reflected in staffing, hours, fees or AFAs

SCORE
___ / 5

QUALITY & SUBSTANTIVE KNOWLEDGE

- Subject matter expertise
- Knowledge of our business and goals
- Project management
- Innovation and creativity in delivery
- Proactivity in completing matter work
- Overall quality of work
- Satisfaction with the outcome

SCORE
___ / 5

AVAILABILITY & COMMUNICATION

- Responsiveness
- Clarity of guidance and communication
- Trust based on legal guidance
- Trust based on interactions

SCORE
___ / 5

ADDITIONAL FEEDBACK

Click to add comments

OVERALL AVERAGE

___ / 5



Sample In-House Performance Scorecard

IN-HOUSE

FIRM NAME

FEEDBACK BY

MATTERS HANDLED LAST YEAR

FEES & ADMINISTRATION

- Clarity of financial and budget requirements
- Management of the invoice payment process
- Comfort with agreed pricing models and rates
- Receptiveness to discussing and implementing AFAs
- Clear guidance on appropriate AI use, confidentiality, security and approvals

SCORE
___ / 5

QUALITY & SUBSTANTIVE KNOWLEDGE

- Project management
- Knowledge of the work and business context
- Satisfaction with the matter outcome
- Likelihood of continuing the relationship
- Support for the company's diversity expectations

SCORE
___ / 5

AVAILABILITY & COMMUNICATION

- Timely engagement of outside counsel
- Clarity of scope, instructions and goals
- Responsiveness to outside counsel needs
- Access to necessary stakeholders
- Communication of gaps and issues during the matter

SCORE
___ / 5

ADDITIONAL FEEDBACK

Click to add comments

IN-HOUSE AVERAGE

___ / 5

Criteria

Sample definitions for consistent 1–5 scoring



ACCESSIBILITY

1-5

1. Unresponsive
2. Responds after 3–4 days
3. Responds after 2 days
4. Responds within 24 hours
5. Responds same day

EASE OF DOING BUSINESS

1-5

1. Unprofessional, difficult to work with
2. Gets the job done, but creates unnecessary work and pulls in multiple points of contact
3. Mostly meets expectations on teamwork, professionalism and project management, and mostly acts as a single point of contact
4. Meets expectations on teamwork, professionalism and project management, and acts as a single point of contact
5. Exceeds expectations on teamwork, professionalism and project management, and acts as a single point of contact

SUBSTANTIVE EXPERTISE

1-5

1. Poor subject matter competency
2. Fair subject matter competency
3. Average subject matter competency
4. Good subject matter competency
5. Excellent subject matter competency

RESULTS

1-5

1. Did not achieve planned litigation/advice results
2. Mostly meets expectations on planned litigation/advice results
3. Meets expectations on planned litigation/advice results
4. Exceeds expectations on planned litigation/advice results
5. Exceptional results on planned litigation/advice

TECHNOLOGY & AI-ENABLED EFFICIENCY

1-5

1. No meaningful AI/technology use to improve delivery
2. Limited use, with little impact on time, staffing, or cost
3. Appropriate use with some demonstrated efficiency benefit
4. Proactive use with measurable benefits reflected in staffing, hours, or fees
5. Consistently redesigns delivery using AI/technology and shares meaningful efficiency and cost benefits with the client

BUDGET PERFORMANCE

1-5

1. Hours expended per project scope was unreasonably more than quoted
2. Hours expended per project scope was more than quoted
3. Hours expended per project scope was a little more than quoted
4. Hours expended per project scope was more or less equal to what was quoted
5. Hours expended per project scope was much less than quoted

Use these definitions as guidance when completing the outside counsel scorecard. Adjust as needed for practice area or matter type.

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