UpLevel Ops

Take Legal to the Next Level

Five Ways to Ease into Metrics

By Stephanie Corey, CEO/Founder, UpLevel Ops

I was inundated with questions about metrics on a recent Legal Operations panel. The General Counsel in the audience, all from small organizations, wanted to know what they should be tracking, from where would they get the data to how could they get their teams to start caring about the whole process. We spent much of the panel time discussing possible solutions, and it became evident to me that the folks in that room are not the only ones in the dark – many are struggling with these very same questions. So here you go. Just like *Dear Abby* for the business of running the law department, I'm your own personal operations manager, here to answer your questions on metrics.

Let's start with, "Why track metrics in the first place?" First and foremost: **You can't control what you don't measure.** Collected data keeps you well-informed about what's going on in your department. Without it, how do you know whether or not you're delivering effective legal services?

The truth is you don't!

But by collecting and analyzing data, you can ensure that you're focusing your resources on what's most important to the company. And over time, this data tells a story, with a past (where you've been), present (what's going on today) and future (what is the trend showing for tomorrow and beyond?). This data will also let you know when you've hit (or missed) your targets.

"Metrics should support whatever goals you're trying to achieve. Good metrics will help you drive the strategy of the department and provide focus and performance for your team."

Now for the "What." What should the metrics look like? First, it should be clear to everyone what the metric is and why it's being tracked. For instance, if you're focused on pulling more work in-house and reducing outside counsel spend, your metrics may include:

- Internal people spend to external outside counsel spend *(Is outside counsel spend decreasing as you hire internal heads?)*
- Spend with specific firms *(Are you sending trivial matters to expensive firms?)*
- Budget to actual *(Are your firms doing a decent job of budgeting accurately?)*
- Year-over-year trends
- AFA usage

If you're implementing a new Ethics and Compliance program, perhaps you want to measure:

- Types of matters being reported
- Root causes of matters
- Matters by location
- Average time to resolve

The point is, metrics should support whatever goals you're trying to achieve. Good metrics will help you drive the strategy of the department and provide focus and performance for your team.

Finally, let's talk about, "How?" How can you take the steps to establish effective metrics? The first thing you want to do is **identify what you want to measure.** If you're a nerdy MBA like me, you may even want to think of the "SMART" acronym when defining your metrics: specific, measurable, achievable, relevant and time-based. Be sure that what you're measuring supports the company's goals. In other words, the CEO's goals should influence the GC's goals, and the legal department metrics should measure the progress towards those goals.

This is a critical step in **getting buy-in from the team.** Once you move towards a data-driven legal department, there is a good chance that you may need to change many of your processes and possibly even your culture, and because of that, you need the team to buy-in to these changes. Gaining an understanding of how their activities influence the company's goals is an important step in this process.

The third consideration is **understanding where the data resides and the best way to collect it.** Some of that data will be easy to collect, such as spend data out of your eBilling system. But other data might be tough, especially if you don't have the systems in place designed to track and report, and therefore will need to be collected and tracked manually. And once you've got that figured out, you're ready for the fourth step, which is to **monitor and analyze the results regularly through dashboards and reports.**

Lastly, **use the data and share the results**. The data you collect should drive decision making and effect change, and the results should be communicated regularly to the team to keep them motivated and interested in continuing the metrics program.

A few final thoughts. Don't bite off more than you can chew. Start small because going through all these steps is hard and it takes time. A few meaningful metrics are better than 25 metrics that are used for nothing. Change them if they need to change and stop if they're not being used. Metrics should evolve with your changing department, and at the end of the day will show all the great progress you and your team have made.

Stephanie Corey is the CEO and Founder of UpLevel Ops and a widely respected veteran in Legal Operations with areas of expertise in Information Technology, System Implementations, Process Analysis and Improvements, Finance, Communications, and Administration.

Recently, Steph co-founded LINK (Legal Innovators Network), a legal operations organization exclusively for experienced, in-house professionals. She previously founded the legal operations trade organization CLOC (Corporate Legal Operations Consortium)and is a former executive member.

Stephanie formerly served as the Chief of Staff and Senior Director of Legal Operations at Flex, the second largest manufacturing company in the world. She has spent the better part of her career providing value-added services to Legal Departments, including building and deploying critical infrastructure to enable them to meet their business priorities.

Stephanie holds an MBA from Lehigh University and a BA in Economics from Wilkes University. She is based in Redwood City, California.

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** or you can discover more at **UpLevelOps.com**.