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# Legal Ops Pros Come Together To Push Industry Change

By **Melissa Maleske**

Law360, New York (March 16, 2016, 1:22 PM ET) -- Cross-company collaboration propels innovation in legal departments and forces legal service providers to follow suit. Here, six legal operations directors discuss how working together is driving industry change.

Legal operations managers have risen to prominence in corporate America, but 15 to 20 years ago, the role was still brand-new and the directive to reduce costs, manage service providers and increase efficiency came with a question mark. Law firms were resistant to change, technologies were still rudimentary and there were no best practice blueprints for the germinating field of legal operations.

Today, however, the legal operations community is changing the way law departments work, helping them become leaner while growing in sophistication, and it's happened not by innovating in a bubble but by learning from one another's trials, errors and triumphs. Members of the Corporate Legal Operations Consortium's leadership team say there's power in numbers, and working together is changing the legal industry.

## **Law360: How did collaboration become such an important part of legal operations?**

**David Cambria, Archer Daniels Midland Co.:** A lot of us in the [legal operations] community had known each other from either industry events and/or informal networking. At any point, any one of us could pick up the phone and one person would know another person who could get you in touch with someone who was doing something that you were doing to change the way law departments deliver service to their clients, but also manage this thing called the legal function.

You don't graduate from law school or business school and get a specialization in law department operations. It really is a pulling together of a series of skill sets and insights that come from having an operational awareness, business insight and acumen, and a political agility to manage an organization.

**Stephanie Corey, Flextronics International Ltd.:** Going on six years ago, I'd recently gotten a promotion to [legal] chief of staff at [Hewlett-Packard Co.] and wasn't quite sure what that entailed, so I was reaching out to other companies in the area to figure out who else had the role and what they were doing. We started benchmarking and then Connie [Brenton, a CLOC founding member] said, "Hey, why don't we start meeting in person?"

**Connie Brenton, NetApp Inc.:** It's a new role, and so all of us were certainly in a state of educating ourselves and developing a set of best practices. Everything was new when we were

starting, so it made sense to collaborate. The other thing that was different is that we were collaborating with some of our providers, so our providers were oftentimes connecting us. They, too, were seeing common threads.

### **What are some of the ways you've collaborated with providers?**

**Corey:** At the genesis of this role, there weren't many technologies that were geared toward legal departments because they were not seen as a place where technology companies could make money. There wasn't really a market there. Through collaborating, we've gained power. There's strength in numbers. We've gone to vendors and asked for specific things. We've gone to law firms and asked for creative ways to price things, which are bringing rates down in general. The market has responded. All kinds of technologies are being developed for us and we've seen law firms really starting to do things in a different way to make us happy.

**Christine Coats, Oracle Corp.:** Back in 2006, when I took over the role as a person of one — and a lot of us didn't have teams yet — legal lacked IT funding. It was not even on the radar. Legal operations directors had to help the third-party technology vendors that were then small teams or very small startups. We helped them work with the IT teams, work with the legal team and make that tool or solution efficient. This technology was starting to take off, but we actually helped them develop their product.

**Jeffrey Franke, Yahoo Inc.:** We both guide and connect. We oftentimes see synergies between not just technology providers but other players in the industry, whether it be law firms or some of the legal service outsourcers. We can see where they can come in and create economies of scale and leverage those solutions for others in the industry.

One example is ThinkSmart workflow solutions, a tool that many of us use in-house to drive policies and processes and create solutions. All of our companies utilize nondisclosure agreements on a regular basis, and many of us have created portals or automated solutions to create NDAs. And it would be logical for law firms to take that kind of portal and make it available to their clients. They can draft the NDAs or be involved in the process for creating the flow if the company hasn't done it.

Another area where we're working across industries is in leveraging Uniform Task-Based Management System codes. CLOC has gotten in there to connect with the law firms, the standard-setting industry and the e-billing providers of the world to try and create standards we can all use.

### **Does competition ever stand in the way of collaboration?**

**Franke:** No, I think it's the opposite. On the law firm side, all the law firms are looking for ways to rethink how they deliver and price their services, and the same thing is true for corporations. We're trying to drive as much efficiency as we can, so there's a real energy and excitement about connecting the different players and creating a connected industry where we're thinking about things at least similarly. We're looking for ways to leverage what's already there and figure out what are the new business models, what service delivery models and technologies should look like, and how they should operate.

**Corey:** For vendors or law firms or any of the service providers, I think they see it as a huge advantage to be able to get in front of us and figure out what we want. And when you reach out to other legal operations people, even if you're in competing markets, everybody seems really willing to share information. I haven't seen anybody who would look upon this negatively.

**Brenton:** Well, law firms are not excited about sharing some of their ideas with other law firms.

We have encouraged competitors, for example, to get into the room together and do trainings and develop processes for us, and the idea is so nascent that at the onset it is uncomfortable. It's happening because the client is asking, but the results are profound.

**Lisa Konie, Adobe Systems Inc.:** I totally agree. In February, our patent team pulled together all of our patent firms and our engineers and brought in other companies for two days. We had multiple firms here talking to our engineers and in-house patent folks about what the process looks like, how it works, what they're doing well and what they're not doing well. We had someone from a law firm who was a secondment to us speak to all of our firms about what it was like being in-house. It's an example of bringing multiple firms together to sit at the same table and effectively see who they're competing for business against.

### **Is that something you would have seen 10 or 15 years ago?**

**Konie:** No. I think it's because of what the legal operations role is doing. We are forcing change and we're getting ahead of it and encouraging things such as these kinds of collaborations amongst the firms. I don't think anybody was doing stuff like that 10 years ago.

**Cambria:** There were law departments who were thoughtful and were acting in the way my colleagues have described. They were doing it very episodically or were spending lots of calories and energy consulting firms in the mid-to-late '90s to figure out creative ways to move the needle. Typically, they found they were able to move the needle in legal operations only slightly because they were dealing with the people who provide services to the legal industry in a very lumpy fashion.

The coordination, collaboration and communication amongst all the different companies to help drive the change at a more rapid pace, that's really the magic of what you see here. You're really seeing a confluence of a lot of events that are driving the momentum toward the changes we're seeing. The noise is harder and harder for the vendors to ignore, for the law firms to ignore and for the law schools to ignore.

### **Does that collaboration extend to companies without a formal legal operations role, that might only have a very small legal function?**

**Konie:** Absolutely. When we used [a request for proposal] process to do a firm convergence, we gave a significant amount of feedback to one of our firms that didn't make it and we explained our whole process. And kudos to this firm, because they actually asked me to talk to a general counsel of one of their other clients who was going to start down the path of doing an RFP. They didn't have a legal operations role, she just wanted to put me in touch with their client just so her client could gain learning from an operations perspective.

**Cambria:** As newer general counsel are hired into corporations, they tend to very quickly realize that there are things they have to get informed on and get smart about pretty quickly: saving costs, managing legal spend, mitigating risk, providing service to their client and overseeing a whole portfolio of business problems that have a legal solution. And so what you see is, if GCs don't add the legal operations function, they are very quickly looking throughout their organization or looking to their peers and colleagues to see how they've solved it as well. Oftentimes, those discussions turn right to the operations functions that exist in more mature law departments.

### **Can you share some more collaboration success stories?**

**Brenton:** The reason many of us have an instant NDA is because it was presented at a CLOC

meeting and that became viral. There was such a high [return on investment] and it was such an easy implementation. That solution was a direct result of collaboration within CLOC.

**Konie:** Another example would be best practices around billing guidelines. CLOC had seven companies bring each of our respective billing guidelines to the table and hash through everything and talk about what should be the best practices so that we can try and get efficiency gains for everybody involved. Because now the law firms aren't dealing with seven different sets of billing requirements, they're getting one. I think that's a beautiful example of the collaboration amongst CLOC participants and way we're benefiting the community at large.

**Brenton:** These guidelines are up on the CLOC website for anybody to leverage. You can imagine how good that also is for our e-billing providers. It takes resources to create a set of billing guidelines. This way, smaller in-house departments can leverage a best practices document already created for them.

**Coats:** We've all grown. Knowing each other has taken our roles from basic one-offs in the department to teams, from managers to senior directors to vice presidents. It has been quite an interesting niche and career path that I've experienced, and I think everyone has grown along the way because we have been collaborating.

**Corey:** That's our greatest success story: How much we've elevated this role and proved the need for it.

### **What's your message to law firms, vendors and schools?**

**Franke:** Collaborate, reach out. For the longest time, we've been operating in silos. Almost everything we've talked about today centers on the notion of collaboration and reaching beyond your area of expertise or outside of your institution — whether that institution is a law firm, a corporation, an educational institution, or a technology institution or discipline — and working with others to understand their challenges and their opportunities.

**Cambria:** Corporate legal departments are driving the changes that they're seeing within legal service delivery and within the legal space. And the best way to really understand where that change is going is to become part of that change with us. The bulk of the \$300 billion legal marketplace comes from corporate law departments, and so we have no choice but to change the way things are happening because our companies are demanding we do it. And we need you along for the ride.

--Editing by Katherine Rautenberg and Kelly Duncan.