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## From GC to Co-Founder

David Ruiz, The Recorder

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Jon Hoak didn't want to sit around all day doing nothing during his retirement. So he started a company.

UpLevel Ops, launched this summer, is the brainchild of Hoak, the former general counsel at Flextronics International, and Stephanie Corey, the company's former legal operations director. The consulting firm startup provides clients with legal operations guidance, strategies and implementation. It also offers executive and C-suite training sessions. Hoak spoke with The Recorder about his new business venture, how it differs from in-house life and what he hopes to provide clients.

### **Why did you leave in-house life for a startup?**

I wanted to do something different. I've been doing the big company, corporate work, general counsel thing for literally decades. Stephanie and I can't remember exactly how we came up with it, but we had different conversations and I like to say she didn't want to train another general counsel in her work. So, we got thinking, maybe we ought to get into the legal ops world. I developed a passion for it as I discovered in recent years it wasn't so much doing another M&A deal or fighting another litigation or doing another ethics and compliance investigation that really got me passionate. It was much more about running a legal department and making it as efficient and effective as we could, along with the development of people.

### **What are the biggest differences between partnering with a business and running a business?**

It's a big difference. Being a general counsel was hard, time-consuming and demanding. But I was not doing things outside my comfort zone. Running a business is a very different thing. You've got to be on all the time and looking for that edge. Also, what's very different, and I'm enjoying this part, is getting to know so many different companies and businesses, instead of going really deep into Flex. Flex was an excellent place to work. Lot of wonderful people in the legal department, really smart, dedicated clients, but like any big company, it does have its share of bureaucracy and politics. I've never been with any company that didn't. That's life in a big company. To be out here on our own in a small company, it can be a little nerve-wracking not knowing where the next client is going to come from. On the other hand, you get to call your own shots.

### **What are the current needs in legal operations and how is UpLevel Ops addressing them?**

At this stage there are two main themes where people most want our help, and there's some overlap.

One is in the legal technology space. Legal tech has just taken off in the past few years. Companies and legal departments are exploring what they might do and they're interested in what's out there. You don't have time to look into each individual area, whether it's contract management, e-billing, e-

discovery, e-signatures, document management, knowledge management, case management, so many different things. They're looking to us to help figure out the areas where they should be putting their time and attention. And then, who are the best vendors in a space? Who are the ones they should be talking to and doing demos? The second area is outside counsel engagement. It's how they make the selections, how they approach it, do they do an RFP, do they do any auctions, beauty contests, how do they decide who they're going to engage as outside counsel? And how do they partner with outside counsel? We're getting quite a bit of interest in e-billing systems. I thought most companies had it but I saw less than 40 percent of the Fortune 1,000 companies in the U.S. have e-billing systems. And then it's how you evaluate your outside counsel. Do you have scorecards? Do you communicate with them? Do you take actions based on who's performing well and who isn't? Those are the two broadest areas.

### **What lessons do you have for general counsel and legal departments installing legal operations?**

Make sure the legal department recognizes it's a services organization and has the right culture and mindset. They are there to serve their internal clients. Second, what I would say to any general counsel is, no matter how good of an attorney you are, you're only one person. Yeah, you can make a difference in getting the highest-profile matters that you should, but the biggest thing you've got to do is to recruit, develop and retain a high-performing workforce. That's where a lot of my passion is and Stephanie's, is to develop a team that can perform at that high level.

Part of it goes back to the point I made about making sure that everybody's got the same goals. Empower people to have responsibility for their own individual clients. Give them opportunities to develop in their role. We did a lot of different things at Flex, from mentorship programs to special assignments to doing things cross-border. Give these people the opportunities to develop themselves into even more effective people and then have them work with others and train them to be high-quality performers.

### **How do you want clients to see you in the future?**

As a service partner really focused on partnership. We don't want to come in and just tell people, "Here's the formula, go do this, and best of luck." We try and distinguish ourselves from the normal consulting firms. We're really focused on practical, real-world solutions. It's not being focused maybe on the highest, loftiest goals, but more, what's doable, and then provide recommendations that we know can be implemented.

The second part we emphasize with all clients and prospective clients is, we'll actually help you implement. The teamwork piece is there. We're not just going to give you advice and walk out the door. We'll stay there and help implement what we've recommended. Sometimes it can be as simple as being an extra set of hands. Quite often we see our clients—they know what they want to do. They know what needs to be done. But they've got 100 other priorities they've got to deal with, and if we can come in and keep them focused on the operational piece that needs and even provide some of the time and effort that it takes to get it done, we can add real value that way.

### **What do you do outside of work?**

My wife and I are both golfers. We play golf quite a bit. And I am enjoying trying to find some balance to travel and do enjoyable things, including on our own and as well with family. My wife and I both have elderly parents so we're spending time on elder care and we have grandkids.

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