What GCs Can Learn From Legal Operations Pros

By **Melissa Maleske**

Law360, Chicago (March 28, 2017, 9:20 PM EDT) -- It's the job of legal operations directors to ensure the law department runs at peak efficiency and effectiveness, so it's no surprise that they're full of wisdom about how in-house teams can improve. Here are three legal operations professionals' top tips.

Don't Think of Tech as a Panacea

It's easy to get drawn in by the flashy vendor presentations that promise a new technology tool will solve all your problems. But throwing tech on top of a broken underlying process is a costly mistake, and it's one that happens to legal departments all the time, according to Stephanie Corey, a veteran legal operations director and co-founder of consulting firm UpLevel Ops.

Successful implementation of a new tool is hard, and it requires mapping out a department's processes and cleaning them up. Corey recommends bringing in a third party to help review department habits and procedures with fresh eyes. The simpler the underlying processes are, the easier it will be to layer technology on top of what's in place.

"Technology loves simplicity," Corey said. "Know your process, document it, then streamline it by cutting out the unnecessary steps, even if it means rethinking how you currently operate. Then look at possible ways to automate."

And purchasing new technology isn't always the solution. Sometimes simply making the most of what's already in place can go a long way, even basic tools like Microsoft Office and Adobe. A little training to ensure tools are being fully utilized can make employees more efficient and productive, Corey says.

Recognize That Tech Needs an Active Manager

Even after a department has done the groundwork and implemented a tech solution that promises to automate and simplify, they shouldn't expect a tool to run itself, says Christine Coats, who has been a legal operations director for 12 years, formerly spending 10 years at Symantec.

She recommends appointing an expert on the legal team whose job it will be to manage the tool, staying on top of upgrades and evolving best practices, relaying feedback to the vendor about how to improve the tool and learning how to best leverage the tool to effect positive change in the department.

"A lot of people put in place a billing system, for example, and then they don't have that person who knows the system inside and out," Coats said. "A lot of times, they put in the e-billing system thinking it will just automatically save 10 percent. Well, if you don't have someone looking at the data points, doing the reporting, bringing up ways to make things more cost-efficient, it's not going to do what it's supposed to do."

Partner With Your Firms

Some of the biggest inefficiencies that legal operations professionals identify lie not with legal

departments but with law firms. Law departments should share what they've learned about efficiency and process management with outside counsel and work with them to address those issues.

"[Project management] is inherent in how we work because we're collaborative; we work across organizations, both inside the legal organization and across the enterprise," said Connie Brenton, the president and CEO of the Corporate Legal Operations Consortium. "Formal legal project management is becoming more prevalent now because it has worked in the past, and now we're getting better at it, adding technology and process around it."

Where something isn't working, Brenton says, law departments can leverage their own know-how and their position as clients to ask their outside counsel to collaborate on better solutions. The project management role may not come as naturally to law firms, she says, so her legal team shares what it's learned with its law firms, and together they have jointly developed tech solutions that benefit both sides, such as a workflow technology that streamlines once unwieldy processes, communications and approvals for a complex project that encompasses a large team.

Assign Work to the Right People

Every department has low-level, everyday work that needs to be done, which conflicts with a common approach to legal department hiring: Find the best, most experienced expert out there. Law departments should instead focus on hiring staff with diverse experience and skill levels and then pushing work down to junior attorneys, paralegals and administrative assistants rather than tying up senior attorneys who could be focusing on more strategic work.

"If you have very, very senior people doing this low-level work, it's not a great use of your resources, and it's going to create some job dissatisfaction," Corey said. "You want those other layers so there's room for employee development, and there are career paths for those people. It just creates a much healthier environment."

Similarly, departments should think about who's handling the work they farm out, according to Corey. Rather than paying a blue-chip law firm, law departments should consider sending repetitive work to legal service outsourcers, who not only can do the work for less but also can often identify ways to streamline the way the work is done.

Don't Reinvent the Wheel

The increased focus on legal department operations by dedicated professionals has given rise to countless attempted improvements by law departments over the years — some successful, some unmitigated failures.

Instead of learning through trial and error, learn through other companies' mistakes and triumphs. Access templates, road maps and best practices by getting involved with legal operations organizations like CLOC and the Association of Corporate Counsel's ACC Legal Operations section or by simply picking up the phone and talking to a colleague.

"There are experts who have already experienced the stumbles who are able to tell you, 'We worked with this tool, and here are the pitfalls and best practices,'" Coats said. "We all have different problems, but someone else has stumbled across that problem. You can become much more efficient if you ask the community and can get instant answers."

Simplify

There's doing more with less, and then there's just doing less. When something isn't necessary, the most efficient thing to do is to cut it out. For example, Corey has resolved to send fewer emails, recognizing that she doesn't need to loop people in on every single thought she has. If she's not adding value by responding, she doesn't respond. Similarly, she recommends reserving meetings for when they're truly necessary.

On a more complex level, legal departments are simplifying by eliminating lawyer involvement from processes that can be handled through technology and a self-service approach.

For example, Brenton's department adopted a self-service process for low-risk nondisclosure agreements that has removed lawyers from 80 percent of requests, with the remaining NDAs handled offshore. It's cut out a process that essentially wasted attorney time and has created value for the business, Brenton says. The department is also getting closer to the point where it can categorize legal work based on what level of service it requires from outside counsel.

"Right now, law firms are designed and structured to provide bespoke work for every kind of legal matter or question that comes before them, but a small percentage of what we work on with outside counsel requires bespoke attorneys," Brenton said.

--Editing by Christine Chun and Catherine Sum.