

The good, the bad, and the Data: Effective Data-Driven Storytelling

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In an age when the term “data” is ubiquitous, it’s important to weigh both the power of the data to tell a story and the effort it takes to procure it. There is an inclination to assume that all data is good data, and while it is information that can inform decisions, tell a story or provide greater insights into particular situations, some data’s value is marginal.

When establishing a new data collection project, it’s challenging to understand what data you need now to support your initiatives, and what you might need later on as your efforts and department mature. Data collection and data integrity management efforts required are other elements at play.

Following are a few key questions to consider when gathering data.

What is the Overall Strategic Plan?

As Legal Operations professionals, we need to tell a coherent story about what Legal is doing and how it aligns with the business’ objectives. Specifically what that means depends on the business legal is supporting, on the unique stakeholders within the organization, and the culture of the organization.

Consider your overall story and your target audience. If you are trying to position Legal as a strategic partner, to communicate the story to sales and delivery, consider whether or not it makes sense to show the volume and time to execute the NDAs Legal has processed . Think about the pain points of the business: You understand they are focused on streamlining the delivery model and allowing for flexibility in subcontracting. Knowing this, center the discussion on how Legal negotiated unrestricted subcontracting in 80% of the outbound contracts during the past quarter. The data points you collect and communicate will be different depending on the story you want to tell.

What Value Does Data Provide in the Overall Strategic Plan?

The story can, and should, evolve with the business and so there is a temptation to collect as much data as you can. Using the previous example, perhaps you think that in time you will want to show speed to execution, but maybe it is for dollar-value contracts and not NDAs. Knowing you and your business’ 5-year plans can help you look to the future and anticipate the types of data you may need to tell your story and pivot with the business. This also helps you triangulate the data you need to capture. In this example, NDA turnaround time is marginally valuable. It may show minimal progress, but if your business is not focused on this as a pain point, then your time is better spent elsewhere.

How Much Human Intervention or Complex Technical Effort is Required?

We have discussed external stakeholders and the story you are telling them, however, we should not lose sight of valuable internal stakeholders within the Legal Department. The Great Resignation demonstrated the consequences of failing to listen to and address the needs of internal constituents. While the legal team should be operating in alignment with the business, getting adoption of new processes and ensuring data integrity will require that the individual Legal team members are aligned with the goals and objectives of the data collection project.



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When thinking about what metrics to choose, you should also consider how you will collect the data. Will it require inputs from the business? Will it require manual inputs from Legal? Will it require a complex system integration that requires IT resources? These are the costs of capturing the data that cannot be ignored.

If data collection requires too much manual, human intervention, you may lose data because people will find workarounds, which will lead to gaps in data integrity. What's more, the data you used to tell a story now comes with an eye-roll factor. Instead of developing champions to promulgate your story, you may have inadvertently created detractors. That is not to say that if the data is integral to the message you should not capture it. It just means that perhaps the additional data you are also collecting just because you can should be eliminated.

What is the Benefit to Legal?

The next step is not just collecting the data and telling a story. In some instances, data collection initiatives may appear to be individual Legal team member performance metrics, and that may not sit well with the team. A senior attorney who wants to be viewed as a strategic partner who builds relationships with the business may not take kindly to being perceived as a "fast-paced NDA processor." If the external story is that Legal provides strategic value to the business, encourage the team members to help brainstorm ideas of how they can quantify these goals. Perhaps the story is that the legal department implemented self-service NDAs to give team members the time to cultivate relationships with the business. Share with the Legal team that the data collected around subcontracting terms will be used to showcase their partnership efforts with the business. The Legal team may not want to see the metrics, but they will want to know how and why they are being used and how they are benefitting, as well.

Capturing the story in a full 360-degree view of constituents is at the heart of stakeholder capitalism. While you may be tempted to collect all the data you can, it's important to be mindful of the costs of data collection and remain focused on the story you are trying to tell. If you need help trying to coalesce around the story or need ideas about what data is appropriate for your business, UpLevel Ops is ready.

If you have already begun your efforts to collect data and are having trouble with adoption or would like to scale in a thoughtful way, UpLevel Ops can help. Our experts perform a gap analysis to see where you can enhance your data collection efforts and propose practical solutions to reignite your efforts. We look forward to taking your data – and your legal – to the next level.

Sumi Trombley practiced in law firms and in-house legal departments for more than a decade before coming to UpLevel Ops. Sumi previously served as Director, Legal at enterprise legal services provider Marshall Denning, LLC, where she managed and trained a team of junior and senior attorneys and developed and implemented resource optimizing processes for RFPs and pre-litigation disputes. She is known for her ability to provide strategic guidance and cost-effective solutions.

Prior to joining Marshall Denning, Sumi was Legal Counsel at Hewlett Packard Enterprise, serving as a de facto general counsel to top enterprise IT outsourcing accounts. She started her legal career at the law firms of Paul Hastings LLP in New York and Latham & Watkins LLP in DC, practicing corporate finance and securities law.

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