

## Best Practices in Advocating for Resources

**By Stephanie Corey, CEO/Founder, UpLevel Ops**

Advocating for resources in a legal operations role can be challenging, given the complex and varied nature of the legal department's needs. Legal operations managers often need to be proactive in securing resources that enable the legal team to function efficiently and effectively.

Here are some best practices for legal ops managers when advocating for resources:

### **Data-Driven Decision Making**

- Gather data on current operations, such as the time spent on various tasks, costs associated with each task, and success rates.
- Highlight inefficiencies and show how proposed resources can address these issues.

### **Align with Business Objectives**

- Understand the company's overall objectives and position your resource request in line with these goals.
- Show how the proposed resources will further these objectives.

### **Provide Clear ROI Analysis**

- Provide a clear return on investment (ROI) analysis to senior management. Highlight both qualitative and quantitative benefits.
- For example, if investing in a particular software can reduce hours spent on a task, show the potential monetary savings.

### **Demonstrate Competitive Landscape**

- Highlight what competitors or industry peers are doing in the realm of legal operations. This can underscore the need to stay competitive.

### **Engage Stakeholders**

- Involve key stakeholders early in the process. This may include heads of other departments, finance teams, and IT personnel.
- Collaborate with them to understand their needs and how they intersect with your requests.

### **Prioritize Resource Requests**

- Not all resource requests can be fulfilled simultaneously. Rank them based on urgency, impact, and feasibility.

### **Leverage Pilot Programs**

- Before making a significant investment, consider running a pilot program to test the viability of a proposed resource.
- This can provide tangible data on its efficacy and build a case for a more extensive roll-out.

### **Effective Communication**

- Frame your requests in clear, concise terms. Avoid legal jargon and focus on the benefits for the broader organization.
- Regularly update stakeholders on the progress and impact of the resources once they are in place.

### **Stay Updated on Legal Tech Trends**

- The legal tech landscape is continually evolving. Stay updated by advocating for cutting-edge solutions offering substantial efficiencies and improvements.

**The key to successfully advocating for resources as a legal ops manager is to clearly illustrate the benefits, both in terms of business outcomes and operational efficiencies.**

## Build Relationships

- Develop strong relationships across the organization. This network can support resource requests, offer insights, and collaborate on shared goals.

## Showcase Successes

- Whenever a new tool or process is successfully integrated into the workflow, make sure to showcase the success.
- Share metrics, user testimonials, and other positive outcomes.
- Ongoing Training & Development
- Emphasize the need for continuous training and development, showing how it can enhance efficiency, mitigate risks, and keep the organization compliant.

In conclusion, the key to successfully advocating for resources as a legal ops manager is to clearly illustrate the benefits, both in terms of business outcomes and operational efficiencies. Legal ops managers can effectively secure their departments' resources by building a compelling, data-driven case and aligning with the broader organizational goals.

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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.

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## About UpLevel Ops

At UpLevel Ops, we're redefining the trajectory of Legal Operations, empowering you to take Your Legal to the Next Level.

Our approach, rooted in extensive corporate in-house expertise, goes beyond traditional advisory services to act as the right hand of your General Counsel and leadership team. We collaborate closely with our clients, developing bespoke, strategic solutions that meet and exceed business objectives. By curating a personalized strategy blueprint, we infuse your team with advanced methodologies, tools, and workflows tailored to your needs. We are mentors, coaches, and true partners dedicated to enhancing your personnel and processes. UpLevel Ops stands shoulder to shoulder with you, helping to lead your legal department, maximize its potential, and realize your goals.

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