



**iManage**

Making knowledge work

# LEGAL OPERATIONS

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Pathways to proving business value

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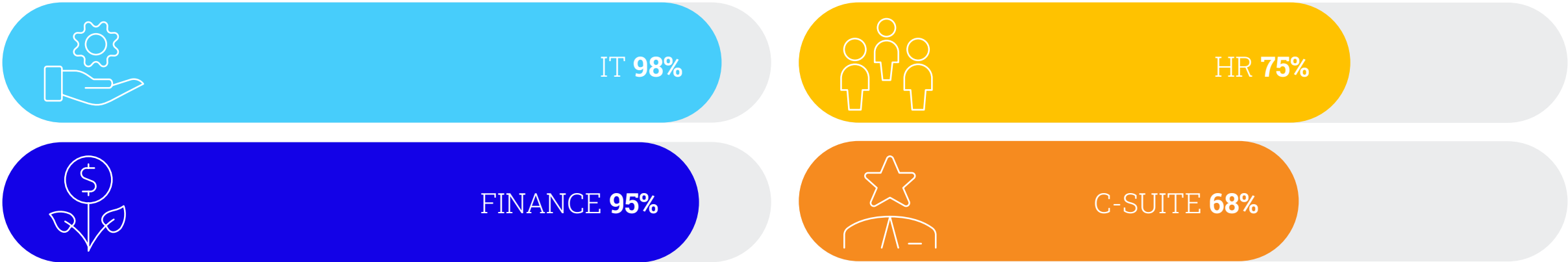
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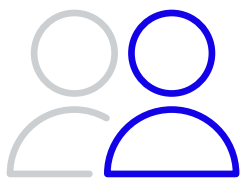
# THE LEGAL OPS EVOLUTION

Once focused entirely on risk management and cost efficiencies to the legal department, legal operations has grown in sophistication and business impact. The value they deliver to the organization has evolved as well, with increasing involvement in cross-functional activities.

## Legal ops weekly interface beyond the legal department



(Source: [blicksteingroup.com](http://blicksteingroup.com))



**50%+**

**Legal ops involved in enterprise-wide initiatives**

Legal operations are also being tapped for company-wide initiatives. In the Blickstein LDO survey, more than half of respondents said they are either “very frequently” or “frequently” involved in enterprise-wide strategic initiatives, a 44 percent increase over the previous year.

“Legal ops is an ethos for transforming things, to change the [legal] industry,” says Stephanie Hamon, Head of Legal Operations Consulting at Norton Rose Fulbright (NRF). “It’s more a mindset than a role... It’s about wanting change and then looking for ways to make that

change real.” Hamon believes it’s all about being strategic and showing that the legal department can be more than a cost center — that it can create value for the business.

(Source: [artificiallawyer.com](https://artificiallawyer.com), 2022)

Business value is typically calculated as the sum of quantifiable business improvements, along with unquantified soft benefits. Thus, the closer that legal operations goals and activities are aligned to the objectives of the business, the higher the team’s value rises in the context of the organization.

Alignment of objectives between legal and business operations is a common obstacle in legal transformation initiatives, according to Ashley Smith, managing director at Deloitte Transactions and Business Analytics LLP. She explains that it can be difficult to harmonize the purposes of attorneys, management, and leadership.

(Source: [deloitte.wsj.com](https://deloitte.wsj.com))

In this ebook we take a deeper dive into how a mature and sophisticated legal operations team can better align legal ops with core business objectives, use technology to measure and demonstrate their value, and promote greater integration of the legal department function into the overall business strategy.



# SHARPENING THE TECHNOLOGY EDGE

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Access to vital company data means that, with the right technology, legal ops can use that data to produce and share metrics that facilitate effective dialogue and collaboration with the broader organization. Metrics that might otherwise be challenging to predict – such as revenue timing, business operations efficiency, data management and storage, and business intelligence from active matters – lead to better-informed management decisions. (Source: [cloc.org](https://www.cloc.org))



Business intelligence is identified as a core competency for the legal operations role to enable legal departments to make better decisions through data. (Source: [thomsonreuters.com](https://www.thomsonreuters.com)) Other major business areas such as financial, IT, executive, and HR also stand to benefit from business intelligence metrics that legal ops can provide.

Legal teams could improve their use of activity-tracking metrics, says Brian Karney, managing director at Deloitte Transactions and Business Analytics LLP, adding that “Improving intake and workflow management with technology

such as automation tools to reduce administrative burdens can provide significant positive disruption for legal teams.” (Source: [deloitte.wsj.com](https://www.deloitte.wsj.com))

Reese Arrowsmith, vice president and head of legal operations with Campbell Soup Company, agrees: “[Legal departments] now realize they are going to make their lives easier by automating the mundane portions of their job, freeing them to focus on more value-added work,” he says. “These advancements are finally giving the department the tools they need to do more with less.”

(Source: [blicksteingroup.com](https://www.blicksteingroup.com))



## Doing more with less is spot on.

Professionals responding to the LDO survey said they spend 26 percent of their time on cost savings, cost efficiency, cost management, outside counsel management, and vendor management. Reflecting on their biggest challenges of the past year, respondents focused on resource constraints, budget

constraints, and lack of technology capabilities. At 72 percent, the demand for technology modernization on this year’s survey results was even higher than last year.

Technologies that take the labor out of mining and combining data to produce easy-to-consume, actionable metrics expand the opportunity for legal ops to demonstrate its value both within the legal department and beyond.



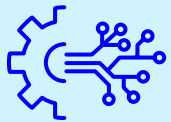
# SETTING THE COURSE FOR GROWTH

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Legal operations are defined as “a set of business processes, activities, and the professionals who enable legal departments to serve their clients more effectively by applying business and technical practices to the delivery of legal services.” (Source: [cloc.org](https://www.cloc.org))



**CLOC separates legal operations into 12 core functions and measures organizational maturity by the resources, scope, and experience level of the team.** (Source: [cloc.org](https://www.cloc.org))



**Emerging competencies** include Business Intelligence, Financial Management, Firm & Vendor Management, and Information Governance.



**Developing competencies** include Knowledge Management, Organization Optimization & Health, Practice Operations, and Project/Program Management.



**Leading competencies** include Service Delivery Models, Strategic Planning, Technology, and Training & Development.

Company leaders must invest resources in modernization and recruit experienced professionals with expertise in finance, marketing, data analytics, learning and development, and engineering to support the legal team. Legal operations can then engage with stakeholders across the business and build cross-functional relationships that enable them to become trusted advisors.

In its helpful guide, *What Is Legal Operations?* CLOC presents a hypothetical scenario for each of the 12 competencies, describing “Current reality,” “Desired state,” and “Why is it important?” After identifying its maturity level in each functional area, each business defines its approach to building or optimizing its legal operations team, mapping desired capabilities to those

of the legal department in alignment with overall business objectives.

(Source: [cloc.org](https://www.cloc.org))

And while organizations are encouraged to self-assess their maturity in each functional area, CLOC is clear that the taxonomy is more journey than roadmap. They advise organizations to continually evaluate processes and discover new ways to deliver value to clients, as they progress.

By way of illustration, let’s say a business decides to target three competencies for immediate growth or improvement based on its assessment of its maturity level in all competencies, and they are:

- **Business Intelligence**
- **Knowledge Management**
- **Technology**





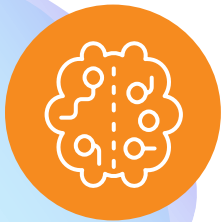
## Business Intelligence

Business Intelligence aims to transform raw data into strategic and tactical insights that can help organizations achieve greater efficiency and cut costs, as well as make better-informed decisions. Modern technology and methods enable legal ops teams to factor in company objectives when

they perform data analysis, so that legal departments can move beyond simple reporting and help to optimize processes and workflows across the organization.

To improve business intelligence maturity, CLOC recommends you:

- Identify the right data to collect and monitor.
- Design and roll out metrics and dashboards.
- Create data lakes and implement advanced analytics.
- Spot patterns and identify hidden opportunities.
- Improve short- and long-term outcomes through data analysis.



## Knowledge Management

Attorneys whose primary focus is providing legal advice to the organization are often responsible for maintaining their accrued knowledge and best practices, as well. But increasingly complex, high risk legal matters require a system under which lawyers can quickly access the latest information. Tapping

into this knowledge using scalable tools that capture and share it across the organization saves time and improves outcomes, yielding ever-greater value.

To improve knowledge management maturity, CLOC recommends you:

- Facilitate knowledge hubs and centers of influence across the organization.
- Ensure consistent response on topics and issues.
- Design an intranet that makes sharing and finding best practices easier.
- Encourage team members to document and share their work in standard templates and formats.
- Guard against loss of valuable knowledge caused by staff departure and role changes.



## Technology

Business changes in lockstep with technology. Solutions based on the current state without respect for future advancement quickly leads to broken processes and tools that only slow workflows down. To avoid that scenario, design a system that meets current needs while anticipating future advancements. Then implement the design with bulletproof technology

that supports today's workflows and scales for tomorrow's, promising long-term success.

To improve technology in your organization, CLOC recommends you:

- Create and implement a long-term technology roadmap.
- Incorporate connected tools for eBilling, matter management, contract management, IP management, e-signature, and more.
- Automate repetitive or time-consuming manual processes.
- Determine where to build and where to buy.
- Evaluate new vendors, suppliers, and solutions.
- Assess emerging technology capabilities and incorporate them into your long-term strategic planning.
- Structure an effective partnership with your corporate IT team.

While these steps gradually equip the legal department with **better procedures, tools, and technology**, they also contribute to achieving organizational goals such as improved **risk management, compliance oversight**, and a **modern work environment** that drives the enterprise forward.



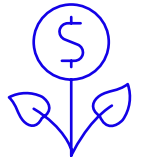


## MAKING THE MOST OF ALLIANCES

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The value that legal operations can bring to the business goes well beyond the quantifiable, and beyond the legal department as well. Cross-functional collaboration helps establish the legal ops role in driving the business forward. To that end, team members may gravitate to affiliated departments in the enterprise, from which mutually beneficial relationships most naturally develop. These include finance, human resources, and IT.

**By proactively reaching out to other areas of the business, building relationships, producing and sharing metrics, the legal ops team makes a daily commitment to demonstrating its value to the organization.**



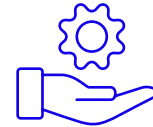
### **Opportunities with Finance**

Finance is a key potential ally for legal, and a relationship worth building. As a core competency, financial management tasks such as the departmental budget, forecasting, trendspotting, flagging potential cost savings, and identifying efficiency opportunities are often conferred upon legal ops. These shared areas of interest and expertise provide common ground and create opportunities for reciprocity.



### **Make HR an ally**

HR is highly regulated and likely works closely with legal on matters such as employment law, visa sponsorship, terminations, and benefits. Legal ops can promote this relationship by managing HR concerns quickly and effectively. By anticipating hiring surges or other fluctuations in demand and proactively readying resources to accommodate the increased workload, legal ops can raise its capital with this important ally and the organization.



### **Partner with IT**

Legal ops can prevent IT from being over-committed to one department by providing end-user training and support for any technology solutions that the legal department requires – both for its own use and by others. This strategy helps form a partnership between legal and IT, while ensuring a clearly articulated purpose and maximum adoption of any solution they recommend. It also reinforces legal ops ownership of the technology (and the knowledge it provides).



### **Be open and approachable**

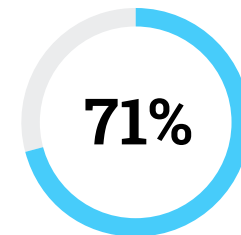
Legal operations team members should be accessible to other departments. Making the most of informal communications – even where no partnership opportunity is obvious – may win participation in high-level meetings and lead to involvement in external conferences, round tables, and webinars. Keeping all interactions personable, open, and responsive conveys a professional, service-first approach.



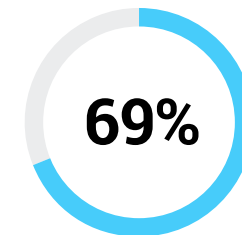
## MEASURING VALUE THROUGH IMPACT

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Demonstrating value requires measuring impact — and communicating that impact to the business. But the muscles called on to measure and demonstrate value may not yet exist. In its State of Legal Operations 2021 survey, Deloitte found that:



**of those surveyed lacked a process to validate whether work and resources were properly aligned**



**felt attorneys took on too much administrative work** (Source: [deloitte.com](https://www.deloitte.com))

**Legal operations can employ a variety of techniques to measure and report their value to the business and communicate the team's impact across the organization.**

Methods include:

- **Qualitative and ad hoc**
- **Key performance indicators (KPIs)**
- **Benchmarking data and self-set goals**
- **Metrics and dashboards**



**Qualitative and ad hoc**

Statistics, financial data, and time series are important, but qualitative and ad-hoc data provide insights that help company leaders view the numbers in context. And while more difficult to collect and analyze, any subjective or categorical knowledge related to the people, technology, or processes that precipitate a shift in behavior or results can be a worthwhile challenge that enables legal ops to raise or secure its reputation.

Examples of qualitative or ad hoc opportunities include:

**M&A or securing a large contract**

Qualitative feedback can be as important as quantitative data when assessing progress after winning a large contract or deal. Verbatims such as: “I felt really welcomed by the team,” could help to explain strong numbers in culture assimilation, while “I struggled to learn the new systems and tools that I needed to use to get up to speed,” might illuminate lower than hoped-for numbers in the adoption of new processes. Insights like these can help a business identify areas for improvement.

**Adoption, engagement, and satisfaction**

Monitoring adoption, engagement, and satisfaction levels enables legal ops to be confident that any technology or process change removes barriers to effective workflows and addresses

the targeted pain points. Subjective feedback is crucial to measuring and optimizing adoption of any new technology tool or process. The best tools make it easy to monitor and track adoption behaviors.

**Compliance matters resolved**

Interviews with employees can be an effective technique for uncovering issues or gauging success in assessing matters of compliance. Prioritize open-ended discussions that offer the freedom of engaging in a casual dialogue; these are far more likely to yield valuable insights than asking people to answer multiple choice or yes/no questions on a survey.



## Key Performance Indicators (KPIs)

Strong, self-derived KPIs are fundamental to demonstrating value. As the de facto gauge of success, KPIs measure a business's performance against defined targets that align department and individual goals and achievements with those of the wider business. LDO survey respondents ranked "Value provided to the corporation" as the second most important and "Customer/client feedback" as third, behind only "Actual spend vs. law department's total budget."

But legal operations may not find demonstrating their value through KPIs a simple task. (Source: [blicksteingroup.com](https://www.blicksteingroup.com))

Deloitte's [State of Legal Operations 2021](#) survey found that:

- Just 32% of those surveyed said tools could provide actionable KPIs and reporting without significant manual effort
- 67% are unable to clearly and consistently demonstrate the value of their technology

The path for legal, then, is first to identify the KPIs of the business and then to set its own KPIs in alignment with these. Legal KPIs might involve the number of contracts completed, time to complete, litigation success rate, achieving high marks for compliance, and intellectual

property successes. Goals should be specific, measurable, attainable, relevant, and time bound (SMART).

Legal operations' KPIs should differ from those of the legal department while aligning with and contributing to overall department performance. As the data arm of the legal department and perhaps the company, legal operations are likely to have multiple KPIs based on data analysis and creating metrics.

Every team is different, but legal operations KPIs might include:

- Attain desired goals for new tech adoption and user feedback
- Raise the percentage of matters handled per attorney by X
- Increase time spent on legal activity over administrative tasks by X

- Reduce average cycle time to close a deal by X
- Achieve X% higher client satisfaction rating in annual survey
- Improve ratio of resolved to open compliance issues by X

What is the objective the KPI helps legal ops or the business attain? Decide what to measure and why. Weigh your KPIs against those of other teams and assess their overall strength. Strategize how your team can reach these goals and put a plan in place to measure progress. Finally, establish a system for holding the team accountable when KPIs are at risk of not being met, a process for understanding why, and next steps to get back on track.



## Benchmarking data and self-set goals

Benchmarking is another way that legal ops can demonstrate value, tracking progress or gains in specific areas and setting continuous improvement targets. For the greatest impact, schedule reviews of the data at intervals that reflect the anticipated rate of change for each item being measured and align benchmarks with overall business objectives.

### **Benchmark goals may include:**

**Customer satisfaction.** Measure your services against metrics like responsiveness, access to team members, clarity around roles and responsibilities, and timely delivery. Identify strengths, take note of weak areas or issues, and agree on what steps you can take so that, year on year, the survey results demonstrate progress.

**Service alignment.** Poll key stakeholders to learn whether the legal ops team priorities are in sync with the other teams' expectations. Limiting the scope of the team's activity to high-priority deliverables ensures that their time and effort is spent to

a measurable degree on advancing desired business outcomes, thereby increasing team value.

**Horizon scanning.** Interact with key departments and allies, leaders, and board members to learn about short- and mid-term plans, set goals accordingly, and follow up with strategies for achieving those goals.

Judicious sharing within the organization of legal operations' benchmark progress, anticipated outcomes, and future goals can help the team establish its value and set a course for increasing that value over time.

“

Data is the crown jewels of Gilead's business. When the IT team asked us to do an extensive security review of iManage, it cleared those hurdles effortlessly.”

**Brien Bergner, Manager,  
Legal Operations, Gilead**







## Metrics and dashboards

A key resource for any business, metrics are increasingly available to legal operations via sophisticated productivity solutions that enable the team to collect quantities of diverse datasets concerning day-to-day work. Fed into dashboards for analysis, these data can be formatted to show various aspects of work process and product, in flight and completed, high level and in granular detail.

Metrics like these go well beyond justifying a legal department's tech requirements — helping to quantify the value that a sophisticated, maturing legal operations team contributes to the wider organization. Results can be structured to answer important business questions as well as to demonstrate the results and benefits of new processes and technologies.

The impact of one such technology is the focus of the February 2021 commissioned study [\*The Total Economic Impact of iManage Work™\*](#) where Forrester Consulting took a multistep approach to evaluate the impact that iManage Work can have on an organization.



Interview responses from knowledge workers at six corporations were used to build a composite organization model that assessed time spent on key tasks. The study then used the model to learn how using iManage Work for intelligent document and email management reduced the time employees spent on those tasks, and calculated what the time savings meant to the company in terms of real dollars.

“

Much of the time people spent trying to get information in and out of our content repository was essentially refunded and can be applied to higher-value activities. And the frictionless user experience has really inspired adoption. iManage clearly spent a lot of time figuring out how lawyers like to work.”

(Source: Legal operations and global technology manager, restaurants, interviewed for the Forrester TEI study)

The risk-adjusted present value (PV) quantified benefits, which are totaled over three years of iManage Work usage, include:

- Productivity improvement of **240 hours per user, per year** thanks to faster search, upload, and predictive filing, **equating to \$4m over three years.**
- **750 hours of IT staff time saved annually** by eliminating the burden on IT to set up secure external document exchange for the legal team – an **IT productivity improvement of \$60,379 over three years.**
- **\$324,534 saved over three years** by retiring the legacy document management solution and associated software, equipment, and maintenance costs.

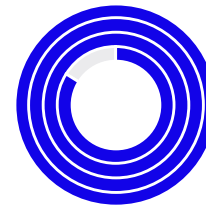
(Source: [The Total Economic Impact of iManage Work](#),™ a commissioned study conducted by Forrester Consulting, February 2021)

TOTAL BENEFITS					
Benefit	Year 1	Year 2	Year 3	Total	Present value
End-user productivity improvement from faster search and upload	\$1,425,531	\$1,639,344	\$1,781,906	\$4,846,781	\$3,989,539
IT productivity improvement from simplified secure external document exchange	\$22,200	\$24,420	\$26,640	\$73,260	\$60,379
Avoided cost of prior solution	\$130,500	\$130,500	\$130,500	\$391,500	\$324,534
Total benefits (risk-adjusted)	\$1,578,231	\$1,794,264	\$1,939,046	\$5,311,541	\$4,374,452

**Key findings for the composite organization include:**



**<6 months**  
Investment payback



**378%**  
Three-year return on investment

Legal ops can use metrics similarly to demonstrate their own value creation and return on investment (ROI).



# A SINGLE HUB FOR COLLECTIVE INTELLIGENCE

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As legal operations has matured, its core focus has moved from risk management and cost efficiencies in the legal sphere to cultivating more and better alignment with core business objectives.



“

Having one source of truth for all matters for all of our global legal teams helps us reduce risk, be more efficient and aid in compliance.”

Dr. Maik Ebersoll, LL.M, Head of Legal Operations at Robert Bosch GmbH

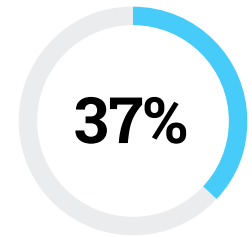
### Alignment with core business objectives

To grow in this capacity, legal must first identify the capabilities they require to achieve their department and business outcomes, then make iterative technology investments and process or workflow enhancements to achieve those goals.

Judicious application of technology solutions enables legal departments to ensure that tech investments address targeted end-user pain points. Improving legal workflows helps to secure alliances and prioritize business and department outcomes while demonstrating the value of the greater integration of the legal department into the overall business strategy.

Wherever your team falls on the maturity spectrum, there is room to grow – and there has never been a better time to invest in that growth.

iManage supports legal operations by creating a single hub for collective intelligence for a more efficient, frictionless, and collaborative knowledge work experience. Intelligent search makes finding documents easier and reduces the team’s reliance on IT, driving efficiencies while increasing the application of institutional knowledge and precedent.



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