What is Success for Legal Operations?

Law Department Management

BUSINESS REPORT

As we approach the end of the year, it’s common to evaluate individual and team performance. The legal ops function is involved with many parts of the legal department. Thus, success needs to be evaluated from multiple angles. Potential success could include cost savings, department efficiencies, seamless collaboration with external partners, well established disaster preparedness plans, workforce diversity, clear department goals and priorities, and/or availability of core department metrics. Companies have different priorities and goals — but there are some general practices that are helpful when evaluating legal ops success.

Surveying is one of the best methods to measure satisfaction and success. Regularly gathering feedback from your law firms and legal department employees will provide valuable insight into legal ops effectiveness and performance. In addition to measuring satisfaction and success, feedback can also support a business case for project funding.

Analyze your survey results and leverage the data to support strategic transformation for your department. Listed below are a few survey ideas that would help establish baseline benchmarks and identify areas that need growth as well as change opportunities.

Legal department survey

A department-wide survey should include questions to establish satisfaction with the legal ops team as well as potential areas for improvement. Questions may include:

- Do you have the tools you need to complete your job functions?

- How often do you directly interact with a member of the legal ops team?
- How satisfied are you with the outcome of your interaction with the legal ops team member?

Include questions that can carry over from year to year so improvements or declines can be measured. Take the opportunity to also ask what types of training people want. Include a text box so free-form comments are collected.

Law firm surveys

Law firm surveys are important to compare your department processes with others. To ensure you get helpful information, let your firms know you are looking for candid feedback to help identify areas of improvement as well as areas where your department excels. Include questions that allow firm contacts to rank the ease of working with legal ops in addition to questions about specific processes and tools. After you receive your survey results, be sure to analyze the information and take action. If all your firms are giving your e-billing system low ranks, maybe you should consider upgrading or changing aspects of that system to make firm employees more efficient. If eDiscovery responsibilities fall within the responsibilities of the legal ops team, include questions about those services and employees as well.

Post-project survey

After completing a large project, it is useful to survey those significantly impacted to gauge the overall success of the project. Some question options may include:

- Do the changes implemented help you?
- Are there benefits to you and your team?
- Did you receive ample communication and training?

In addition to surveys, look at other potential success indicators:

- Department spend — If the department is trying to control or reduce outside counsel spend, the legal ops team is likely involved. Savings may be reflected in discount agreements with law firms, negotiated software contracts with vendors, or ad hoc pricing with discovery vendors. All these different efforts should be tracked and shared with management to reflect the value of the legal ops team.
- Does your department have a strategic roadmap? Are there active projects that align with the roadmap? I wrote a column earlier this year about roadmaps and setting department strategy.
- How much time does the legal ops team spend on capital projects? In many companies, investing capital reflects investment and growth. If your company separates spend by operations, maintenance, and capital, a healthy percent of your legal ops team's time — while working on innovation and process improvements — should be capital, which lessens the burden on your department overhead budget.
- By showing how much work the legal ops department enabled, the legal ops team inherently shows its value. Some examples of statistics include the number of invoices processed, number of new vendors on-boarded, number of new timekeepers on-boarded, number of accruals processed, number of employees on or off boarded, number of active discount agreements, number of budgets processed, number of new matters, number of closed matters, and number of training sessions held.
- Project metrics, such as budget and timeliness, can be used to measure success of project

management.
- Process improvements achieved — summarize all the big and small achievements to remind management of the work completed and ongoing.

If you are a legal ops professional, keep in mind that someone in your organization may never come to you and ask you to reflect your value. I have been in the corporate world long enough to know that you should always have a justification for your role — and your team's. If you are worried about looking too closely at your team's success, that probably means you have a problem that needs to be addressed. Take the time to establish as many meaningful and measurable metrics for your team as possible and evaluate the work you are performing to ensure it aligns with your department's goals and mission.

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