The Secret Sauce of Legal Ops? The People

Law Department Management

The inaugural Legal Ops Brief column defined legal operations and its purpose. Now it’s time to discuss the composition of this transformational team. Keep in mind, when talking about legal ops, we are focusing on legal business areas such as vendor management, financial management, reporting, data analytics, knowledge management, strategic planning, technology, innovation, communications, litigation support, business process improvement, eDiscovery, compliance, and policy management.

Legal ops professionals should bridge the gap between legal, finance, IT, and the business units. It is not surprising that legal ops professionals often come from these same business areas as well as the legal department. There is no single place that legal ops professionals come from; industry trends are showing that teams of people from diverse areas lead to very innovative and creative teams. If you are hiring, keep an open mind regarding the background of your new hire(s). Do not define your description and requirements so tightly that you miss the perfect candidate due to keyword qualification filters.

Generally, legal ops teams are very lean. Professionals must be skilled in many different areas, which means in addition to the specific roles outlined below, each team member needs to be a contributor, excellent communicator, team player, and an independent worker.

Ops team leader. The leader of a legal ops team can have many different titles. Some common options are head or director or manager. Regardless, many of the core functions are the same. The lead will be involved in processes such as department strategy and vision, financial management, project management, process improvement, and change management. Some core characteristics of a successful ops lead are tenacity, open-mindedness, problem solver, leader, visionary, disrupter, excellent communicator, collaborator, and network builder. The lead should be comfortable presenting to and working with corporate executives as well as open to learning from each member of the legal department. This role does not require a JD, and many times it comes down to the general counsel and his or her preference.

Legal technologist. Technology plays a key role in legal department operations and someone in the legal department needs to understand and support that technology. The tasks of the legal technologist may include training department employees, serving as application administrator for core systems, maintaining relationship with core vendors, and reviewing and prioritizing department projects. This person should be collaborative, innovative, and organized as well as a strategic thinker, problem solver, and project manager.

Legal administrator. Think of this role as the key operator of all vendor management activities such as firm and timekeeper onboarding, discount agreement management, invoice processing, process enforcement and budget management. Some key characteristics for this role are strong written and oral communication skills, extreme patience, multi-tasker, active listener and excellent time manager. In addition to your attorneys, this person will be directly interacting with your firms and setting the tone for your relationship.

Legal operations analyst. Now that legal is expected to manage spend like all other business areas of a company, the function of an analyst has become more important. This role may include tasks such as report preparation, data analysis, meeting facilitation, business process evaluation, and documentation of best practices. A detail-oriented, inquisitive, open-minded, and diligent person would thrive in this role.

Depending on the size of your legal ops team you may also have roles such as project manager/LEAN lead and eDiscovery manager. Other team members or personnel in other departments at your company may fill the functions provided by these roles.

In the past, there has been no clear career path or formal training for becoming a legal operations professional. That is changing as more and more legal departments hire for the role. Industry groups are working on legal ops certifications that will provide basic benchmarking for new professionals trying to get into the field.

Keep in mind, when referring to a legal ops “team,” in many cases it may be one brave individual filling all the roles described above. These solo professionals should be commended. They possess a large range of skills that keep their legal departments running as efficiently and effectively as possible.

When you find the right mix of personnel, the legal ops team will affect your entire departmental culture. The general nature of operations work will lead to identifying areas of improvement that will cause change. A good operations team will push and pull your department to a culture of change without making employees feel as if they have failed or done something wrong.

Evaluating processes can be humbling because legacy processes that have been in place for years

are suddenly identified as inefficient. Operations, with the support of the general counsel, should promote change to be viewed as a success — not a past failure. The message should be communicated that as the world changes, how we work must evolve to stay relevant.

Do you want some benchmarking on legal ops staffing? Use the ACC Global Benchmarks Survey. Do you want some benchmarking on directors of legal ops? Use the Anatomy of a Director of Legal Operations study.

What subjects would you like to see covered in a future Legal Ops Brief column? Send topics of interest to me at jmricher@aep.com.

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