

White Paper

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# Guide to Legal Ops

Transitioning toward a Modern  
Legal Department





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## Topics Covered

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2. What is Legal Operations?
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# The Rise of Legal Operations

## How Did We Get Here?

Legal departments have dramatically changed over the last few years. Managing a team and proving value through strategic planning has become one of the most important aspects of legal operations. This guide is for **legal teams** looking to set up, improve, or modernize their current workflow.

## What is Legal Operations?

Legal operations (**legal ops**) is the function that provides processes, administration, and people management to help in-house teams provide excellent service to their customers.

Legal ops can be managed by dedicated legal ops professionals or can be utilized by attorneys themselves to support their work on legal matters and help them prove value.

Legal ops increase efficiency, manage spending, provide reports, leverage technology, and more. Legal ops are often used, with outside counsel management, vendor negotiations, department budget, staffing needs, and tracking key performance indicators (KPIs).

# How has Legal Operations changed?

## The Evolution of Legal Ops



### Pre-1990s

Before the 1990s, legal ops was asked to focus on risk management. This would involve managing outside counsel without much fear of budgetary restrictions.

### 1990s to Mid 2000s

During the 1990s-Mid 2000s, there was a shift toward business strategy and insights. This meant dealing with more complex, regulated, international issues. Legal ops managers dealt more with outside counsel during this period and had some cost sensitivity but not much.

### 2000s to 2019

From the mid-2000s to 2019, legal ops became much more complex and was more integrated into the legal department business. Now legal ops were responsible for creating strategic decisions to drive efficiency and lower costs by leveraging technology and other legal service products.

### Present Day

Today, in a post-covid world, legal operations are still tasked with driving efficiencies and lowering costs while retaining employees. “The Great Resignation” has catalyzed many employees to leave their long-time employers for more flexibility and work-life balance. Now legal ops are tasked with finding technology to further improve current workflows, establish efficient hybrid/remote work environments, and prove value-added.

## Important Hybrid Numbers

1. Companies' average IT spend went up 6.7% from 2020 to 2021 as they continued to adjust to their employees working remotely or on hybrid models.

This trend has continued into 2022 and it is expected that technology will remain critical to business success in coming years.

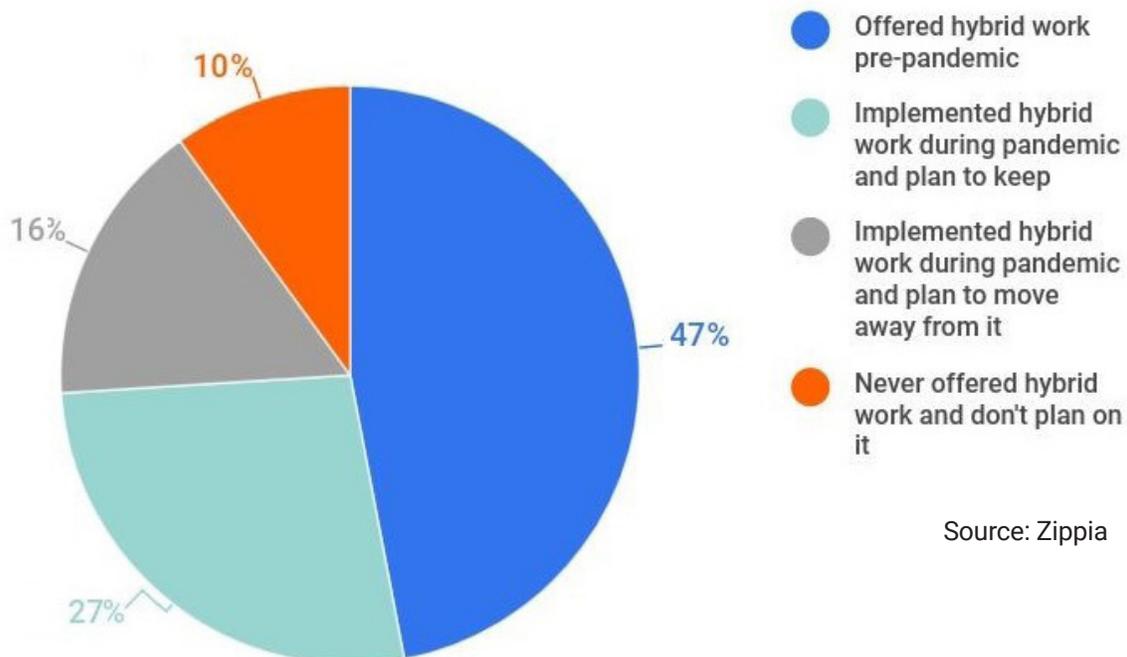
2. 74% of U.S. companies are using or plan to implement a permanent hybrid work model.

The advantages of hybrid working are increased flexibility, opportunities for collaboration and professional development, and decreased costs, to name a few.

3. "Up to 20% of employees report leaving their job to find a flexible or remote working environment."  
(Gartner Consulting Firm)

Losing talent costs 6-9 months of that employee's salary!

### U.S. COMPANY HYBRID WORK MODEL PLANS



Source: Zippia

# Benefits of Hybrid Work

1. On average, companies see a **12% reduction in turnover** when they allow their employees to do at least some remote work.

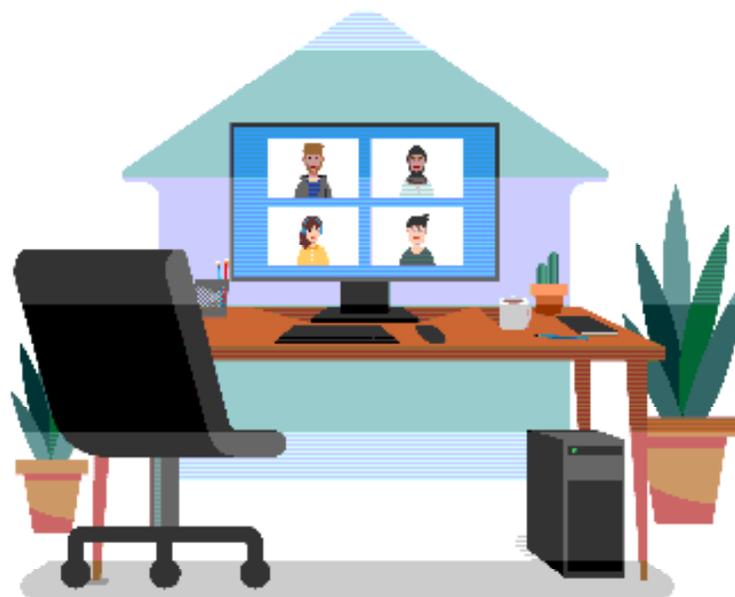
2. 54% of employees say they'd leave their current job for one that provides more flexibility, especially in the area of remote work.

3. **Companies save \$11,000 per year** per part-time remote worker, on average.

4. 83% of companies say collaboration on new projects has been as good or better than it was before

the COVID-19 pandemic when everyone was in the office full-time, according to a study by Statista.

Businesses are preparing for the future of the workforce. To prevent losing valuable workers, legal teams need to leverage legal operations to empower their employees. Through strong communications, accountability, and trust, capable legal operations functions' value will become increasingly apparent - wherever your team is working.



# Best Practices

## Modernize Your Legal Ops



### 1. Inter-department Communication

Legal ops functions must strategically align with other departments & stakeholders to improve collaboration and showcase your impact.

### 2. Accountability

Show accountability **with numbers** like quick contract turnover, how many contracts you're getting a month, how much you have saved in litigation, and more. You should also use project & task management to keep your team aligned toward common goals and **avoid losing contracts**. This clarifies who needs to do what, when it was completed, what's left, and the direction you're heading toward.

### 3. Team Collaboration Tools

With so many employers switching to a hybrid work environment, **different teams must maintain strong communication** with one another along with clients. Communication tools that connect internal and external conversations are more important than ever, to avoid compliance issues and litigation. On top of it all, everyone dreads long email threads and group chats, that become too hard to follow, resulting in a loss of communication.

### 4. Task Management vs Project Management

There is a clear distinction between task management and project management that gets lost; don't let it happen to your team. To have successful **project management**, you need **clear sub-tasks that lead to team goals**. This makes it easier to assign sub-tasks to employees or if those employees are absent; there's a clear objective that someone else can be assigned. **Task management** should be used like an organized "To-Do List." Keep track of the task priority in larger projects to avoid missing deadlines. Successful

legal ops use a combination of both project management and task management to complete team goals.

## 5. Managing Due Dates

Managing due dates is more than circling a deadline on a calendar. How are you giving your team the necessary tools to make sure they are **on track toward your project deadline**? You must always be asking this question to make the projects more efficient.

## 6. Reducing Stress/Bottlenecks

Bottlenecks can affect everyone from CEOs to assistants. Sometimes, it's **unclear where the task has fallen short** or stopped in the production line. This problem can be solved with clear indicators of assigned sub-tasks within a project. Your team will be able to know where a project has gone to die or needs a jumpstart.

## 7. Access to Work From Anywhere

Up to **74% of employers** have reported using or planning to implement a permanent hybrid work model. To ensure that business operations are being maximized to their full potential, **you will need technology that is on the go**. An **all-in-one solution** is critical to store important information that can be accessed anywhere from an office to a café.

## 8. Low-Cost Solutions

Finding multiple solutions that help increase legal ops value is expensive. Your goal should be to **fit what you're looking for into one or two software solutions**. This is cost efficient, easier to teach your team, and helps keep your team organized.



## Choosing Your Software:



We defined how we can improve legal value, next, you must select the best software for you. Being lawyers ourselves, we have first-hand experience with this task and have found it to be one of the biggest struggles. A lot of software is clunky and not as efficient as expected. So, we created our legal ops solution, **ALOE**, to solve those problems. It was designed for attorneys who want to save time and avoid risk.

**ALOE's** contract lifecycle management and project management is fully customizable and simplifies your processes. This frees up to time to let you and your team focus on what matters most, the business.

When deciding which legal ops software is best for your team keep these objectives in mind: communication

- working within an organization **requires strong communication and project management skills**; deliverability - company's deliverables reach their destination on time; and automated workflows - your software should work for and with you, which is why having it customized to your needs is always going to be a better option than not. **ALOE** has these capabilities and more while creating seamless collaboration/communication within and across departments.

Outdated administrative tasks can bog down workflow processes, waste valuable time and negatively impact profits. When business automation is prioritized within your organization, you'll see a gradual increase in productivity and an improvement in your staff's overall quality of work.



# ALOE Examples

The screenshot displays the ALOE dashboard interface. On the left is a navigation sidebar with categories like Business Development, Compliance, Contracts, and Corporate. The main area is divided into two sections: 'Contracts All' and 'Expiring in 60 days'. The 'Contracts All' section contains a table with columns for Code, Title, Status, Due Date, and Assignee. The 'Expiring in 60 days' section contains a similar table for contracts with upcoming due dates. On the right, an 'Activity' feed shows recent actions by users like Derrick, Lucy, and Matthew, including updates to contract statuses and creation of new tasks.

| Code   | Title                   | Status  | Due Date   | Assignee           |
|--------|-------------------------|---------|------------|--------------------|
| CON-10 | Intake Test             | Exec... | Nov 5, 21  | Tanya Av...        |
| CON-5  | ABC Company NDA         | Exec... | Sep 24, 21 | Brycellyn LaBor... |
| CON-12 | Customer Contract AB... | New     |            | Unassigned         |
| CON-7  | (Duplicate) ABC Comp... | In P... | Sep 24, 21 | Tanya Av...        |
| CON-9  | Disney NDA              | Reje... | Oct 29, 21 | Brycellyn LaBor... |

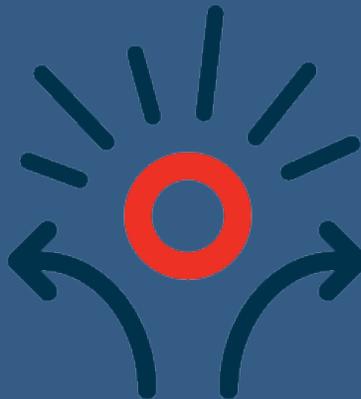
| Code   | Title                      | Status  | Due Date   | Assignee           |
|--------|----------------------------|---------|------------|--------------------|
| COR-3  | 2022 Q4 Board Meeting      | New...  |            | Tanya Av...        |
| CON-10 | Intake Test                | Exec... | Nov 5, 21  | Tanya Av...        |
| COR-6  | Resolution Authorizing ... | Done    | Nov 19, 21 | Tanya Av...        |
| LIT-1  | Demand Letter ABC Co       | New...  | Oct 7, 21  | Unassigned         |
| COR-1  | ABC Banking Resolution     | For...  | Aug 26, 21 | Brycellyn LaBor... |

This screenshot shows the detailed view of a task titled 'NDA - Sky Saddles'. The task is assigned to Tanya Avila and was created on August 9, 2021. The interface includes a top navigation bar with options like 'Attach file', 'Email', 'Request approval', and 'Send DocuSign'. Below the task title, there are sections for 'Details', 'Attachments', 'Emails', 'Approvals', and 'DocuSign'. A 'General' section contains fields for 'Due Date' (August 31, 2021), 'Requestor Name' (Joe Smith), and 'Requestor Email' (joe.smith@email.com). An 'Other Party' section lists 'Sky Saddles, Inc.'. On the right, there is a 'Subtasks' section showing 0 completed tasks and a 'Comments' section with a recent comment from Brycellyn L. The bottom of the screen features an input field for adding comments and a 'Toggle attachment' option.

# Bigfork Technologies

Bigfork Tech's legal automation software, ALOE, is the only fully customizable contract lifecycle management and project workflow solution that you will actually use.

Why are we the leaders in workflow automation? Because we have more than 50 years of combined business and legal technology experience working for Fortune 500 companies, law firms, technology companies, government agencies, and nonprofits. Our legal operations software is proved through trial and error in many different settings over many years.



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