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THE LEVEL-UP
WORKBOOK
FOR LEGAL OPERATIONS TEAMS

SECTION 1: ASSEMBLING A STRONG TEAM

HIRING THE RIGHT PEOPLE IN A HOT JOB MARKET.

Start by evaluating your current team structure and your department's maturity level to identify areas where your organization may need additional support or resources.

Evaluate your current team structure. Based on the following role levels, where does your team need additional support?

The admin-level focuses on basic management activities, such as vendor management, payments, compliance, and reporting.

The optimizer focuses on improving those processes.

The strategizer focuses on maximizing results.

Evaluate your legal department's maturity level to determine which position(s) you should be hiring for.

Level 1: Understanding Spend Tools - Organization does not have a dedicated Legal Ops resource, but technology is either being used or evaluated to provide visibility into legal spend and track expenses.

Level 2: Controlling Legal Spend - Once the correct tools are identified, the Legal Ops department is using these tools to create guidelines and workflows.

Level 3: Managing Operations - The department has now integrated legal tools with existing business systems and has a clear request process.

Level 4: Driving Efficiency - Using the insights gained from integrated technology, Legal Ops can now provide feedback and recommendations to drive decision-making.

Level 5: Changing Behaviors - The department now has the data and outcomes needed to demonstrate operational value and effectiveness at scale.

Identify the gaps in your current processes to determine what kind of traits you are seeking in your next hire. Which of the following traits does your current team need the most?

Business-minded. This role will heavily influence operations and efficiency and how the legal department interacts with vendors and other departments within your organization. You want someone with the business chops to shield the company from risk and ensure the legal department's goals feed into overall company growth.

Strategic. Strategic thinkers should see the bigger picture and be capable of planning how the legal department will continuously evolve. This should be someone who will help design a strategic roadmap that addresses process changes, technology adoption, and internal/external collaboration.

Data-driven. The best strategy is driven by data, making it essential for any potential legal operations candidate to be comfortable diving into the numbers. Legal operations functions also work in step with finance to prepare month- and year-end budgets, provide accrual data, and ensure compliance with financial requirements and SOX, making data analysis a must-have skill-set.

SECTION 2: EVALUATING SYSTEMS & PROCESSES

SELECTING THE RIGHT TECHNOLOGY PARTNER TO IMPROVE COLLABORATION.

Technology is not a magic wand; solutions are most successful when they are used to support great processes. Take a look at your current processes to determine where technology can be effective in strengthening your department.

Conduct a department audit to determine which business functions your team is currently responsible for. Use the following list as a starting point and select all that apply:

Contract management: To facilitate business agreement processes from initiation, review, signature, milestone management, and beyond.

Business intelligence: To collect and analyze data based on important metrics for more strategic decision-making.

Financial management: To plan legal spend, create budgets, implement and monitor e-Billing for legal services, manage accruals, and forecast expenses.

Firm and vendor management: To choose the right firms by performing due diligence, uncovering opportunities, negotiating better rates, handling contract management, and, overall, onboarding new vendors quickly.

Information governance: To create clear policies so as to lower corporate risk, communicate those policies to employees, and manage data security and compliance.

Knowledge management: To facilitate knowledge hubs, create templates, and prevent knowledge loss, e.g., from staff departure or role changes.

Program/project management: To manage projects, workflows, and programs faster without compromising on quality.

Strategic planning: To create team goals that align with the priorities of your organization.

Identify which of the processes above could be streamlined or managed with the use of technology.

Need an additional solution to support one or more of these functions? **Build a comprehensive business case** for new technology tools, such as CLM or AI solutions.

Already have a CLM solution in place? **Take our CLM Value Assessment** to determine the next step on your journey.

SECTION 3: TRACKING GOALS & KPIS

ALIGNING LEGAL METRICS WITH BUSINESS OBJECTIVES.

Whether you're new to legal operations or in the process of growing your current department, here are the five fundamental KPIs that will help you build a solid foundation for growth. Which of the following metrics does your team currently track?

Contract management: Time spent on legal vs. administrative tasks: If you find a large amount of your team's time is being spent on administrative tasks, that's a great indicator that your organization could benefit from CLM and AI technology.

Spend analysis: Track legal spend as a percentage of your organization's revenue. Start by identifying categories and setting benchmarks to track progress over time.

Contract volume: How many contracts does your organization have?

Cycle time: How much time does your department take to close a deal from initiation to signature?

Contract approval time: How long does each department take for reviews and approvals?.

TAKE THE NEXT STEP ON YOUR CLM JOURNEY

Malbek is the modern, AI-charged CLM that unites the enterprise to accelerate contracting velocity. But don't just take our word for it, see it for yourself! Request a demo to learn more about how Malbek can help you take your contracting to the next level.

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