



# **7 Strategies for GCs: How to Become a Strategic Business Partner**

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## Introduction

Having the legal pedigree – deep knowledge of law and regulations, negotiation skills, and specializations such as securities law – is a given. But this skill set is also a great foundation for general counsel and chief legal officers to take a seat at the table; to emerge as a strategic adviser to executives, the board, and the organization as a whole.

The [Association of Corporation Counsel \(ACC\)](#) found in a recent survey that 60% of chief legal officers would prefer to mainly spend their time on the development and execution of strategy, though less than a quarter had done so in the past 12 months.

***Why aren't legal leaders able to focus on strategic initiatives? What can they do to be more strategic?***

This white paper will take a deep dive into how general counsel and chief legal officers can emerge as a strategic partner to the business, answering the aforementioned questions to ensure that legal provides undeniable value to the business.

# The Makings of a Strategic Partner

There are commonalities across individuals who are highly strategic. They are able to balance vision with execution, are extremely curious learners, have a collaborative mindset, and are transparent and data-driven decision makers. While these characteristics are also key for general counsel to have, we've outlined a few other traits more specific to legal professionals who want to emerge as a strategic partner.

## A Strategic Partner is...

- **Expected in the “Big” Meetings**

At its core, a strategic partner is a person that key decision makers – the CEO, COO, CFO, and business leads – want in the room when developing strategy, making big decisions, or making big impressions (think fundraising).

- **A Business Person with Legal Expertise**

With the expanded responsibilities that in-house legal teams are taking on, it's no surprise that sayings like, “business leader first, lawyer second” are being touted across the industry when referring to forward-thinking general counsel and corporate legal leaders. But what does this really mean?

Simply said, you don't want to be perceived as the one lawyer in the room, but a business person who happens to have a legal degree. To achieve this, you must develop a greater knowledge of the business. The more learned about the ins-and-outs of an industry, the more you'll be able to speak up and provide input and business advice no matter what the topic of conversation.

**The best-in-class general counsel is a fully functioning member of the senior leadership team who just happens to be an attorney.**

- **Seen as More than Just Legal Counsel**

Building off the point above, if you're able to familiarize yourself with the entire business and work cross-functionally to understand how decisions impact other people and departments, you'll become someone whose advice is sought out and heeded.

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*"Be the person others turn to for your opinion, not just your legal opinion."*

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## Stop Running into the Fire

Our friend, Stephan Eberle, General Counsel at [Scale Venture Partners](#), uses an analogy about firefighters to illustrate the journey of becoming a strategic partner.

First, you have a firefighter, the person who runs into the burning building to put out the fire. In order to do this, you have to go through training and develop that skill.

Then, you have the Fire Battalion who is responsible for a number of firefighters. This person directs his team on where to go and provides them with the resources they need to do their job. The Fire Battalion also has the training and skill to run into the burning building to support his firefighters.

At the top of the hierarchy, you have the Fire Chief, the person who strategically supports the Fire Battalion and their team of firefighters.

The Fire Chief must not only think about immediate needs, but how the team can be spread across various locations to ensure the safety of the community in the long-term.

You want to be the person that can run into the building and do all levels of the job, but also think strategically about where you, as a legal department want to be, and where the company wants to be.

As you move from being a law firm lawyer or transaction person to a more senior role, you begin managing legal services and legal resources. One of the most important resources you have is your time. You want to find ways to maximize your time to add value, not just perform the transaction of running into the fire and coming back out. When you're focused on completing transactions, you'll have no time to do the (fun) strategic activities.



## A Strategic Partner *is Not...*

- **The Risk Person or “Deal Doer”**

Every lawyer is trained to do deals, encompassing everything from litigation to human resource transactions, and it’s their job to assess risk and provide counsel regarding it. While there are individuals who want to focus on this area of risk management, being a strategic business partner means looking beyond this narrow scope.

Lawyers who are more strategic provide solutions to help manage risk, and at times, accept it. They focus on longer-term issues and strategic goals while making sure that deals and projects are taken care of. Innovation and technology, which we’ll cover later in this white paper, are critical elements for this to happen.

Some words of advice – your legal background makes you uniquely situated to be a risk assessor, which is a great characteristic that must be used in your favor. Continue learning all you can about the business and leverage your ability to assess risk to proactively understand the challenges the organization is facing and determine what solutions you can bring to the table to mitigate these challenges as early as possible.

# 7 Tips for Becoming a Strategic Partner

Everyone is different and there are many paths that lead to success. That said, we wanted to share 7 tips for how general counsel can become a strategic partner, highlighting key things you can do to elevate your position within the legal department and across the organization.

## Tip 1: Be an Information Sponge

A strategic partner is characterized by the ability to anticipate business needs – which means anyone looking to provide strategic input must learn and understand the business, not just the legal aspects of it. Be a sponge and absorb information about the entire organization. Learn what the sales team does, what the securities team does, what the finance team does, and know what's important to each group.

When you understand how each team is impacted, you're able to identify and articulate potential challenges that would have otherwise been overlooked. Oftentimes, executives like the CEO or CFO can't be closely involved with every department and likely aren't aware of the impact a strategic business decision may have on specific departments. By having insight into the needs, goals, and daily activities of other business units, you're positioned to act as the spokesperson for those groups not represented in the room. You can help ensure outcomes that satisfy the needs of the greater organization and provide value to executive business leaders, while mitigating future risk and complications.

**The General Counsel is now a core member of the top management team and offers advice not just on law and related matters but helps shape discussion and debate around business issues.”**

**– Harvard Business Review**

## Tip 2: Plug into the Operations Functions throughout the Organization

Legal is the heart of many organizations because of the cross-functional nature of the department. To become a strategic leader, plug into the operations functions throughout the organization. Strive to learn and understand what they do, how legal weaves into their processes, and most importantly, what you can do to help them and make their lives easier.

And it's not just about making the lives of others easier, but learning from them as well. Seek mentors both inside and outside the legal department to foster learning in areas you might not have had a hand in otherwise.

## Cultivating Inclusion: A Strategic Growth Strategy

When you take finance, accounting, HR, and IT into consideration (and these are just a few of the many departments you can work with), you'd be surprised at the valuable partnerships that can be created.

For instance, if you plan to implement a legal operations management platform for e-Billing and matter management, like SimpleLegal, it's important to reach out to and include key business units and stakeholders early on. This means connecting with finance, accounting, IT, and even procurement to ask what they'll need to support a legal tech initiative.

The general response is almost always along the lines of, "No one's ever asked us before. We'll get back to you , but this is great. Thank you!" These groups are then more open to working with legal – opening lines of communication can often lead to legal being looped into initiatives both in-progress and in the future. A simple gesture helps expand the reach of the legal department, ensuring a greater level of collaboration.



## Tip 3: Volunteer to Lead Projects Unrelated to Legal

Legal professionals have inherent skills – they're often good communicators, risk assessors, and natural project managers. With this skill set, general counsel are in the perfect position to lead non-legal work and projects that could benefit from these skills. The best, and often most strategic general counsel also:

Have a working knowledge of finance

Collaborate well with leaders of other functions

Possess team building and leadership skills

Push yourself outside of your comfort zone and use your skills, those honed and newly learned, to lead projects throughout the organization. Keep an ear on the ground for new projects and volunteer to lead them when they arise. It results in feeling a little uncomfortable, but the rewards are worth it!

## Financial Acumen is a Highly Valuable Trait among Strategic Leaders

Overall job performance improves with increased financial acumen – something that can be said not only for legal professionals, but many corporate executives. When looking at the talent of in-house teams, lawyers who can read balance sheets, understand profit and loss statements, and have good relationships with

the finance team often stand out.

Intentionally seeking out development projects and opportunities to build your financial knowledge and skills has the ability to open the door to more strategic management positions.

Dan Wright, COO of San Francisco-based application performance management company App-Dynamics, is one of a number of legal leaders moving into strategic, operational roles. When Wright joined the company, he was taking on his first in-house role as director of legal. He quickly climbed the ranks, moving to general counsel in just under three years and chief operating officer in four. [His advice](#) to legal professionals looking to move into a more strategic and operational role?

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*Show you have the skill set to be able to step out of the legal area and drive key projects on a company level. If you do those two things, the industry is more and more receptive of GCs making a jump like this.*

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## Tip 4: Use the Word “No” Judiciously

Part of a legal professional’s job is knowing when to say no – and there are definitely times when “no” is the correct answer because something is not legal, may be unethical, or counter to good principals.

But most of the time, presuming people are working with ethical teammates, executives and other teams come to legal with an issue. They might ask, “Can we do this?” and while the answer might be “no”, there are ways to reframe the conversation to be more positive and prevent the perception of legal being a blocker or bottleneck. For instance, “we can do it, but let’s do it this way,” or “that sounds good, but this route is going to be better for this reason.”

## Issue: A Charged Word for Legal Professionals

Saying the word “issue” in a meeting has a way of making a room tense up. But, the reason people come to legal is almost always because there is an issue. Many times, it’s an issue that’s presented itself before, one that’s easily solvable and has no cause for panic or concern. As a strategic advisor and counsel, it’s important to see the bigger picture while

managing risks and expectations. A small change like eliminating “issue” from your daily speak and replacing it with “topic” can help a room feel at ease, giving the sense that legal is in control, and that the group is gathered to have a discussion to determine the best solution for moving forward.

An individual's willingness to learn and overall learning agility amplifies his or her ability to be successful in unclear, complex, and first-time situations. Taking on new projects outside the legal realm will arm you with new learnings that you can subsequently apply to future projects, expanding your knowledge and ability to succeed no matter what the situation.

## Tip 5: Focus on Simplicity and Scalability

Simplifying and streamlining activities, workflows, and processes helps make them scalable. The more scalable your processes are, the faster you're able to move, make decisions, and succeed. Stephan Eberle, General Counsel at Scale Venture Partners, spoke with us and shared his motto for simplicity and scalability: WTSD (Write that S\*\*\* Down).

While the acronym leads to an immediate smile, it makes sense! Stephan always tells his team,

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*"When you see something that happens routinely, like a question that inevitably gets asked once a month or once a quarter, WTSD!"*

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It can be hard for lawyers to do this because they get so busy and don't have to time commit to these items. They'll simply move on, ready to deal with the same question next time. The third or fourth time comes around and the lawyer is annoyed because they're answering the same question *again*.

In some instances, there's a new person on the team, while in others, your previous answer went in one ear and out the other. But, something as simple as writing down the question and answer and keeping it in a place easily accessible to your team and other departments (thanks to technology there are countless options for teams to facilitate knowledge share), can prevent you from spending valuable time on administrative work and instead, allow you to focus on the important and fun strategic activities. And remember, simplicity and scalability doesn't always mean taking on a big undertaking. Start applying this logic to smaller tasks and allow it to grow from there.

**When simplicity and scalability becomes ingrained in your legal team, it'll become second nature.**

## Tip 6: Plan Long-Term for Your Legal Department / Function

When working closely with the business unit or managing a legal team, you constantly find yourself thinking about the resources you need, how to explain that you need those resources, and what the outcomes of having those resources is going to look like.

To emerge as a strategic leader, you want to be a long-term planner that knows what it's going to take to complete a specific project, the resources, dollars, or technology required to get the job done, as well as how to advise the members of your team to execute. This gives you the ability to be proactive and show that your department is always ready for the next project – because the next project is always coming.

Dan Baker, Chief of Staff, Director of Legal Operations at Ancestry.com is always looking at the bigger picture, **thinking about** what he can do now in the short-term to make the most strategic impact long-term.

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*“Legal operations includes process, systems, org structure, and billing and accruals. But when all of these things are done correctly.. You’re demonstrating control of your budget and cost savings thanks to more efficient and effective processes. This makes it easier for finance to open the budget for initiatives like headcount [so you can] add the right talent, at the right time, helping the organization grow strategically.”*

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## Tip 7: Ask for Help, Feedback, and Mentoring

Law schools teach you to do things on your own, not to ask for help... from anyone. So it's not surprising that lawyers can be adverse to ask for help because it makes them appear like they don't know what's going on.

Being a strategic leader means learning from others to expand your knowledge base, and that can mean trying something new and asking (lots of) questions. What is surprising for many individuals is that when you ask for help from business leaders, they enjoy sharing their knowledge.

To take it a step even further, ask for feedback from anyone and everyone. Simply letting someone know that you want to hear what you're doing well and what you can improve on shows that you're interested in improving the relationship. The worst thing that's going to happen is that you're going to hear something that you don't know – something that's going to help you in the future.

# Keys to Strategic Success

For general counsel to emerge as strategic leaders, there are two elements key to success: innovation and technology.

**Innovation means doing things differently and creatively.** A few options might include:

- **Multi-source** - Use outside counsel and non-law firm service providers, as well as in-sourcing for temps and secondment to help drive efficiencies and cost control.
- **Create Self-Help Guides** - Create a resource library for your team and the business unit, and trust them to leverage it and perform tasks correctly. By crafting guides, solidifying answers by writing them down, and making these answers accessible, you're helping to educate the greater business and making more time for yourself to focus on high-priority legal work.
- **Leverage Tools Already Used by Other Teams** - Use tools that other groups have adopted for your purposes, such as training tools the HR team has, workflow tools the sales, operations, or IT teams use.

**Technology is the other piece of the puzzle.** Oftentimes, technology is underused by legal teams due to lack of time, will, and creativity – and in some cases, fear. Yet, when implemented properly, it can save you and your team a lot of time. A few technologies that might be adopted by legal teams:

- e-Billing and matter management
- Deal closing and workflow software (eSignature services)
- Online legal service marketplaces
- Electronic document generation services
- Online training platforms
- Chatbots and digital adoption technology

## Legal Operations Software Drives Strategy

If you have aspirations to move up, it's essential to bring data to the table. A legal operations platform with e-Billing and matter management capabilities can provide visibility into your legal spend by providing line-by-line awareness of where your department is spending money.

If you can demonstrate that every dollar has

a traceable ROI, whether through mitigating important risks to the company or driving revenue through contract management, you'll be able to overcome the misconception that legal is just a cost center. It will also help change the perception of your role as legal counsel and show you're capable of a more operationally-focused role.



## Striking a Balance between Sustaining and Transformative

There are two types of changes that go hand-in-hand with innovation and technology: sustaining changes and transformative changes.

General counsel who are able to make sustaining and transformative changes have the best opportunity to run an efficient department and provide strategic input, whether that's in relation to how work is allocated, staffing, spend control, or budgeting.

- **Sustaining changes** are changes that help lawyers complete day-to-day tasks and deliver services more efficiently and effectively
- **Disruptive changes** are changes that challenge lawyers to think about what else they could be doing or what they shouldn't be doing any longer, allowing them to focus on higher value legal work

# Conclusion

In-house legal teams and professionals are perfectly poised to take a seat at the executive table, driving real, transformative change while protecting and growing the company.

While there are many activities and actions that can lead to success, it really boils down to willingness. Your willingness to move beyond the mindset of, “This is what my job is and isn’t” and say, “If there’s a way I can help the company, I’m going to raise my hand and do it,” becomes a critical component of the puzzle. Those who are willing to push the envelope will be able to accelerate the evolution from legal counsel to strategic-minded business partner.

## Special Thanks

We’d like to thank [Stephan Eberle](#) for working with us and sharing his insights and strategies for becoming a strategic business partner. Stephan is the General Counsel at [Scale Venture Partners](#), overseeing fund and portfolio legal matters and is a key contact for their Limited Partners. Prior to Scale, Stephan spent 17 years at Silicon Valley Bank, most recently as Deputy General Counsel. At SVB, Stephan was responsible for global business legal support, strategic relationships and product development, regulatory and compliance, and governance issues.



## About SimpleLegal

**SimpleLegal combines e-Billing and Spend Management, Matter Management, and Legal Analytics in one comprehensive platform to help in-house legal teams better track and manage their legal spend and matters.**

**We believe that legal technology should be modern and easy to use, require little to no training, and have the flexibility to customize to the unique needs of each organization. We partner with legal departments to drive legal operation efficiencies, gain transparency into their legal spend, and realize significant time and cost savings.**