

Aligning Legal Processes for Success

Presented by



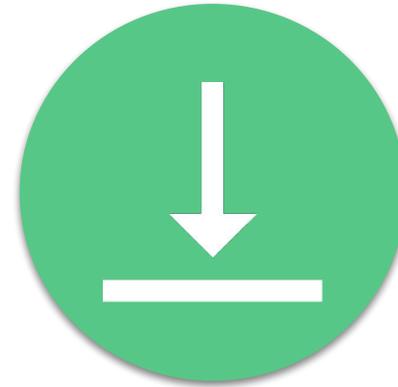
Agenda

1. Housekeeping Items
2. Speaker Introductions
3. Best Practices: Financial Processes
4. Best Practices: Operational Processes
5. Enhancing Processes Using Technology
6. Using Data and Reports to Make Decisions On Process Efficiencies
7. Q&A

Housekeeping



Comments or questions?
Please hold them for
Q&A at the end



This presentation will
be made available for
download by ACC

Today's Speakers



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CEO & Founder

POLL

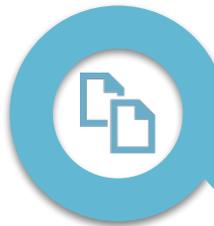
What is the breakdown of the audience today?

- Legal Ops
- General Counsel
- Attorney
- Finance
- IT



Best Practices: Financial Processes

Understand The Different Types of Budgets



Matter-based vs
Department-based budgets



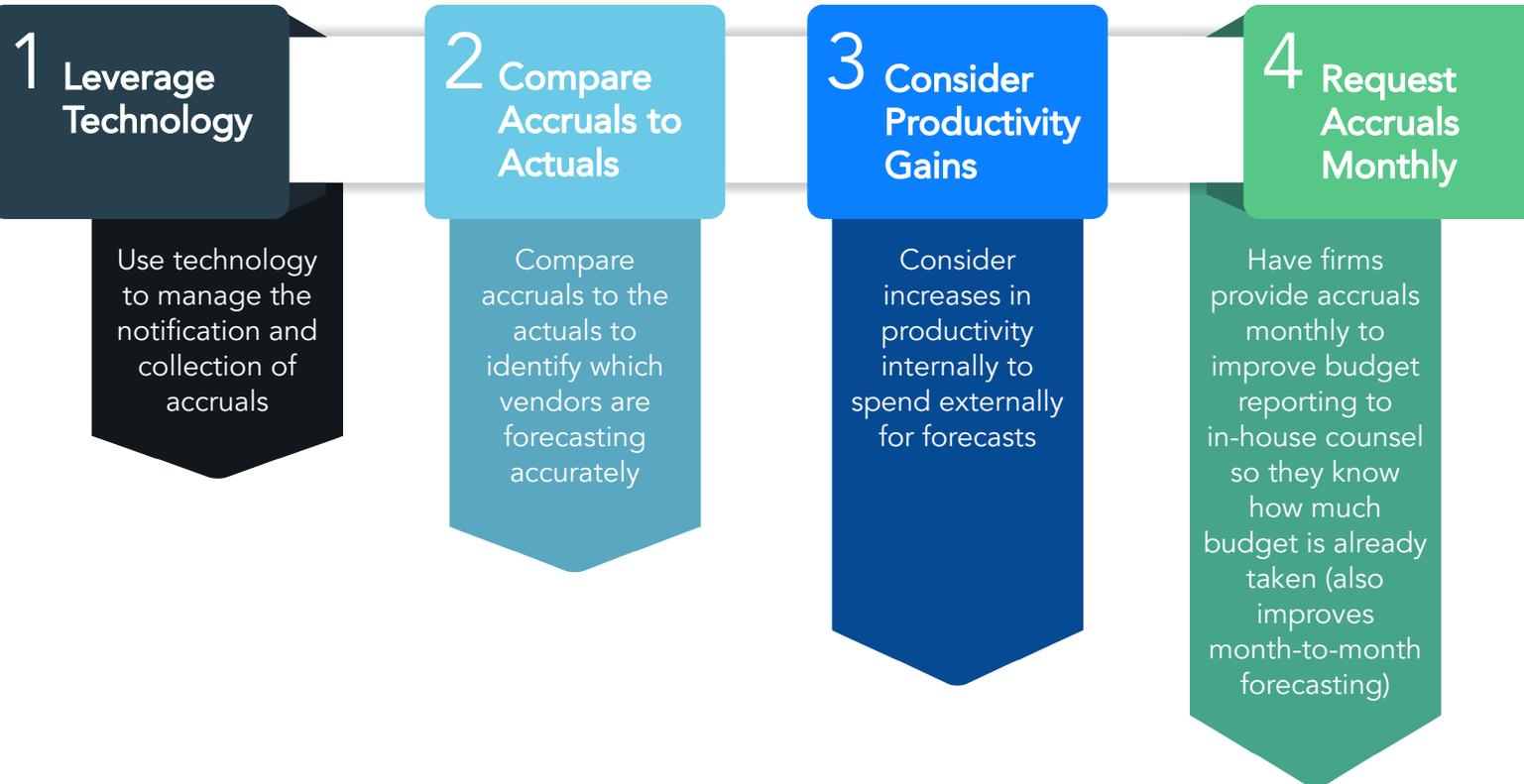
Department budget types:

- Practices Areas
- Matters
- Phased Budgets

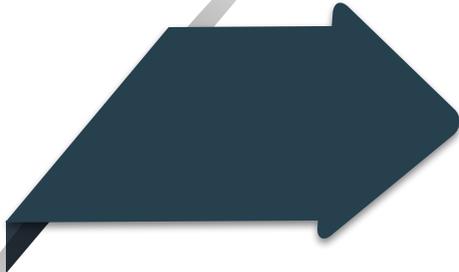


Splits between internal vs external
spend - different companies have
different litigation profiles

Stay On Top of Accruals and Quarterly Forecasts



Shift Responsibilities to Law Firms



Invoice and Payment Cutoffs

- Hold law firms accountable based on billing guidelines regarding the timeliness of bills
- Reduces the complexity of accruals
- A better approach since many accruals are inaccurate



Alternative Fee Arrangements

- Look at historical actuals and sit down with law firms to discuss historical spend on matter types
- Removes the peaks and valleys of hourly rates
- Shifts some of the risks to the law firm

Better Enforce Billing Policies

Understand

1

Ensure your law firms understand your billing guidelines by reviewing it with them - and enforce them!

Reduce & Limit

2

Reduce manual reviews using technology and limit who can approve invoices that don't comply with guidelines

Leverage

3

Leverage ACC's Best Practices:

- Conduct data analytics to understand drivers of spend
- Send the right work to the right resource, internally and externally
- Converge law firms into a preferred panel
- Implement value-based fees
- Drive process improvement internally
- Implement knowledge management systems
- Use metrics to measure and drive performance against targets

Best Practices: Operational Processes

Optimize Your Matter Intake Process

KNOW

Know the nuances between your different practice groups - i.e. thresholds are different for phased budgets

SEPARATE

International lawyer vs U.S. lawyers - need separate processes

LIMIT

Limit who can generate matters and set an approval process

CONTROL

Only allow business clients to engage with counsel when an in-house attorney is present

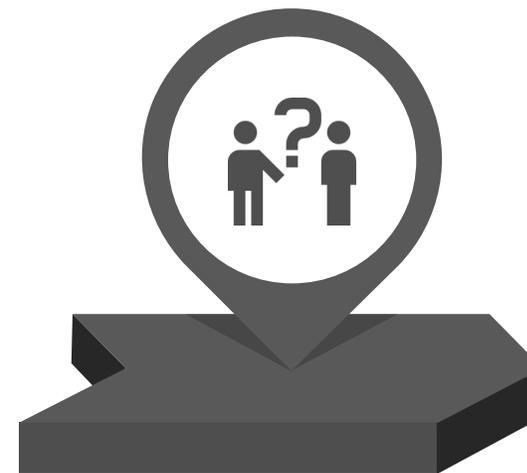
TECHNOLOGY

Use technology to request legal work

Influence Behavior Changes of In-house Counsel

Develop a change management plan

- Communicate early and often to keep stakeholders in the loop
- Train, train, train!
- Assign leadership roles
- Provide a way for the team to give feedback
- Address team concerns quickly and transparently
- Find and support advocates (consensus building)
- Constantly assess and review



Millennials vs Tenured Lawyers

- Different perceptions to technology
- Different approaches to influence their behavior

Manage Vendors and Billing



REQUIRE E-BILLING

- Helps you collect data to analyze and make better decisions
- Cost savings
- Ensures compliance of outside counsel billing guidelines
- Increases payment visibility for law firms
- There are always exceptions
 - Extenuating circumstances
 - Difficult e-billing tools



COLLECT & USE FEEDBACK

- Build a process and database for vendor feedback from your attorneys
- Need feedback from both sides

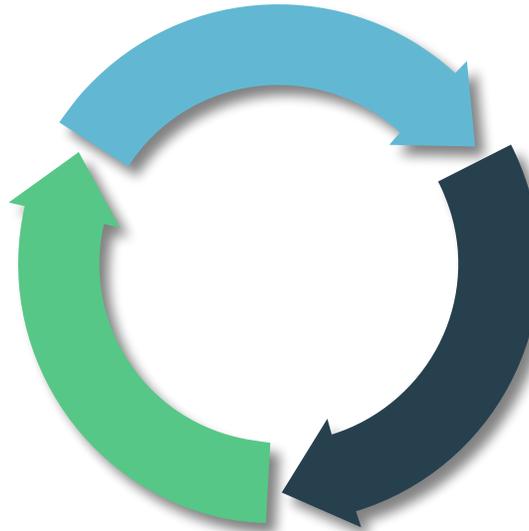
Complete the Feedback Loop

1. COLLECTING FEEDBACK

- Create a process to that's easy & not too time-consuming for your attorneys
- Leverage example questions from ACC
- Leverage SimpleLegal's Vendor Surveys

3. BENEFITS FROM FEEDBACK

- Helps develop an approved list of firms
- Sets the right expectations
- Drives the idea of being a real partnership
- Improves relationships and outcomes over time



2. USING FEEDBACK

- Use to negotiate better rates
- Have some type of grading system or scorecard to easily compare vendors
- Don't hold anything back - give both positive and negative feedback
- Send new hires to law firms that will work on their matters so they know how the firms operate
- Lean on legal operations to deliver feedback

Enhancing Processes Using Technology

How Technology Can Enhance Your Processes

Automation reduces manual work
so the team can focus on high
value legal work



Sets "guard rails" for users so they
follow processes without having to
think about it



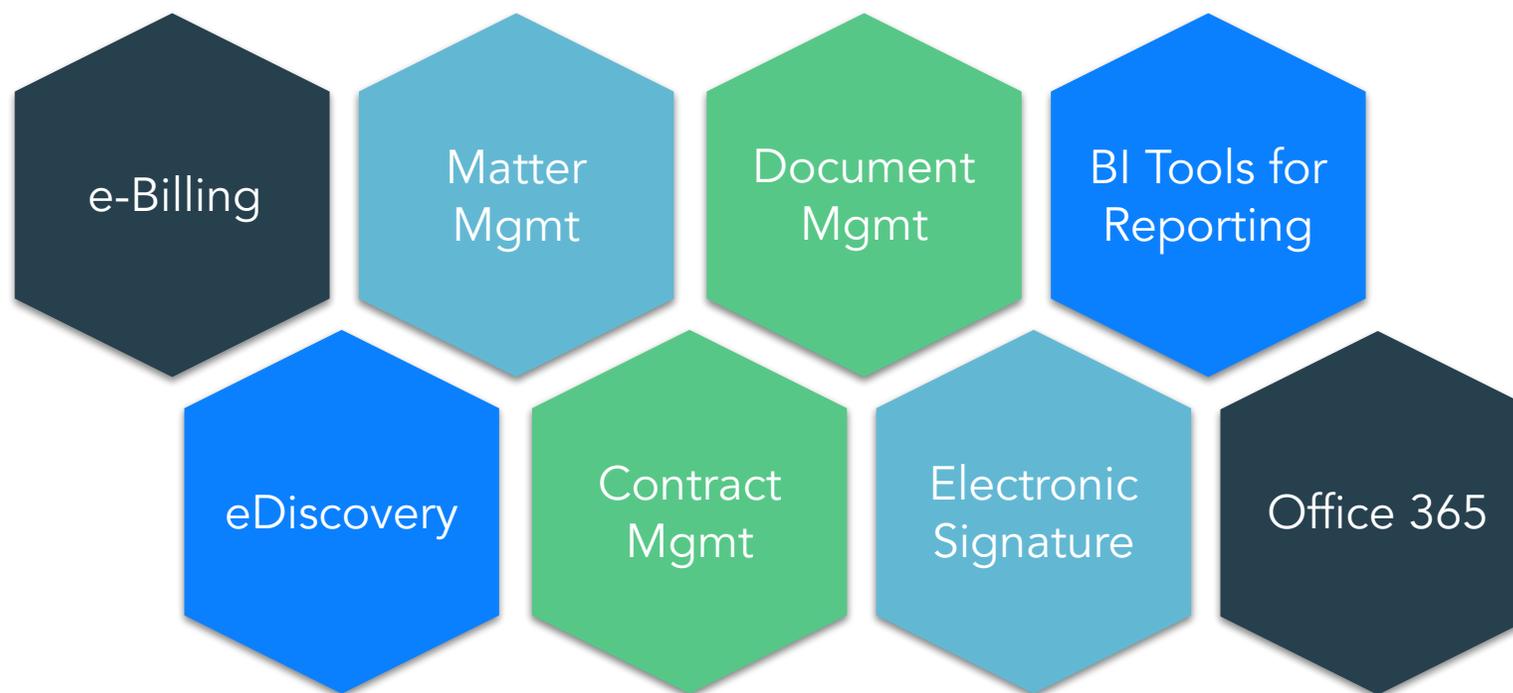
Eliminates redundancies



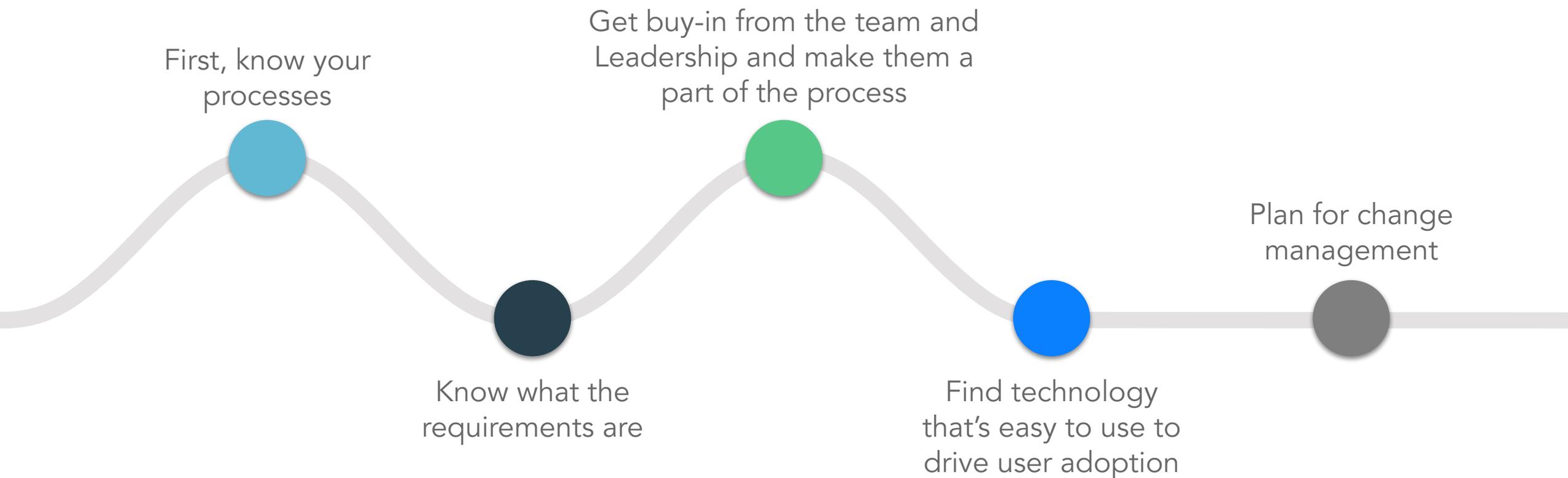
Improves quality of data capture



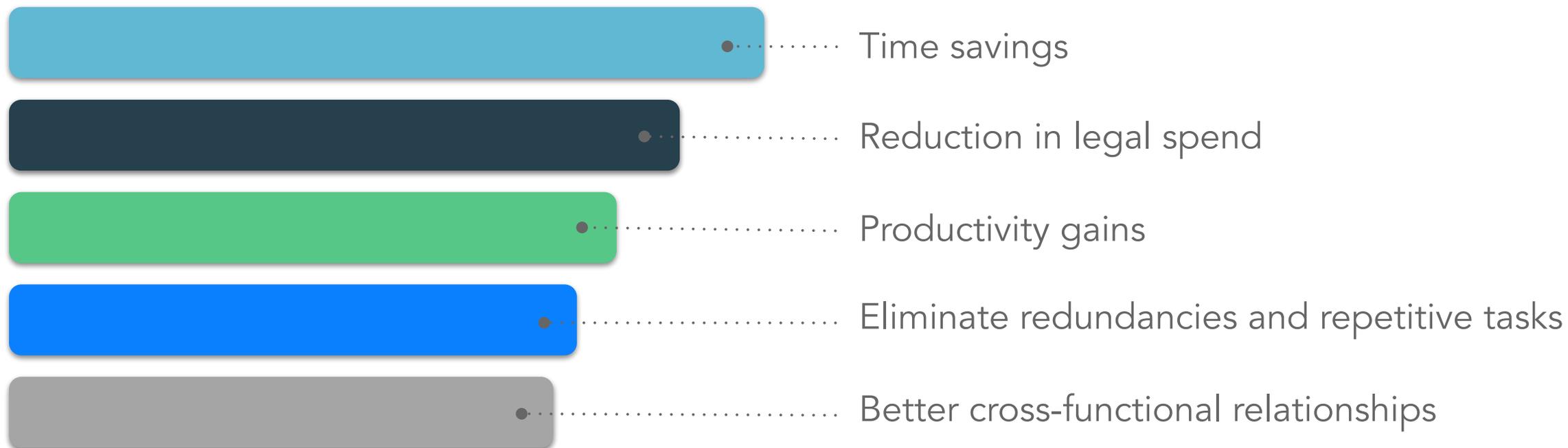
Legal Technology You Can Leverage for Process Efficiencies



Identifying & Evaluating Technology



The ROI from Improved Processes



Compelling Risk Management Justifications for Technical Projects

SYSTEM SECURITY

If your current system is not secured in compliance with your company's data security guidelines

SYSTEM SUPPORT

If your current system is going to be de-supported or is otherwise not being supported in a manner that is consistent with your company's support guidelines; if it's built on an outdated technical architecture, etc.

SYSTEM COMPLEXITY

Sometimes the complexity of a solution in itself can be a risk factor

INSUFFICIENT CHANGE MANAGEMENT

If the current implementation of a system did not have sufficient change management to drive adoption, you may need to re-launch the system with better engagement (or recognize the solution is not the best for the team and move to a different solution)

Using Data and Reports to Make Decisions on Process Efficiencies

The Types of Bad Data

Duplicate

Data that occupies more than one record in a database



Non-conforming

Data that hasn't been normalized as per the system of records



Missing

Empty fields that should contain data



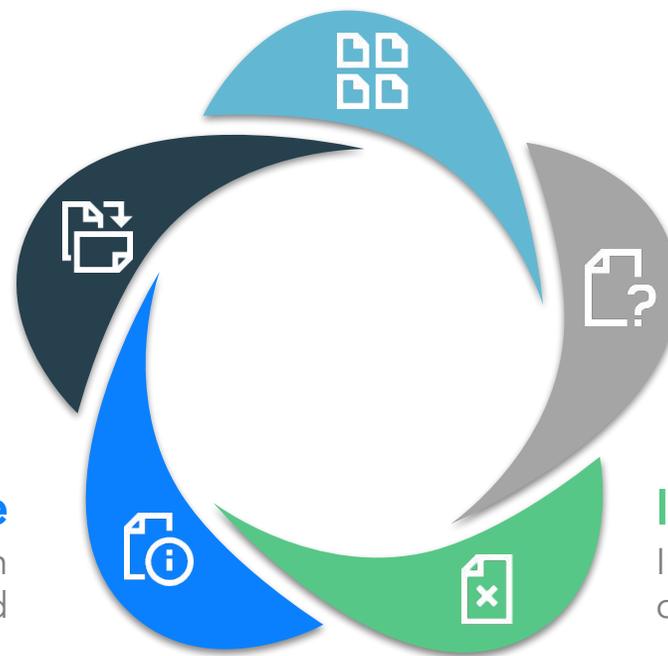
Inappropriate

Data that's been entered in the wrong field

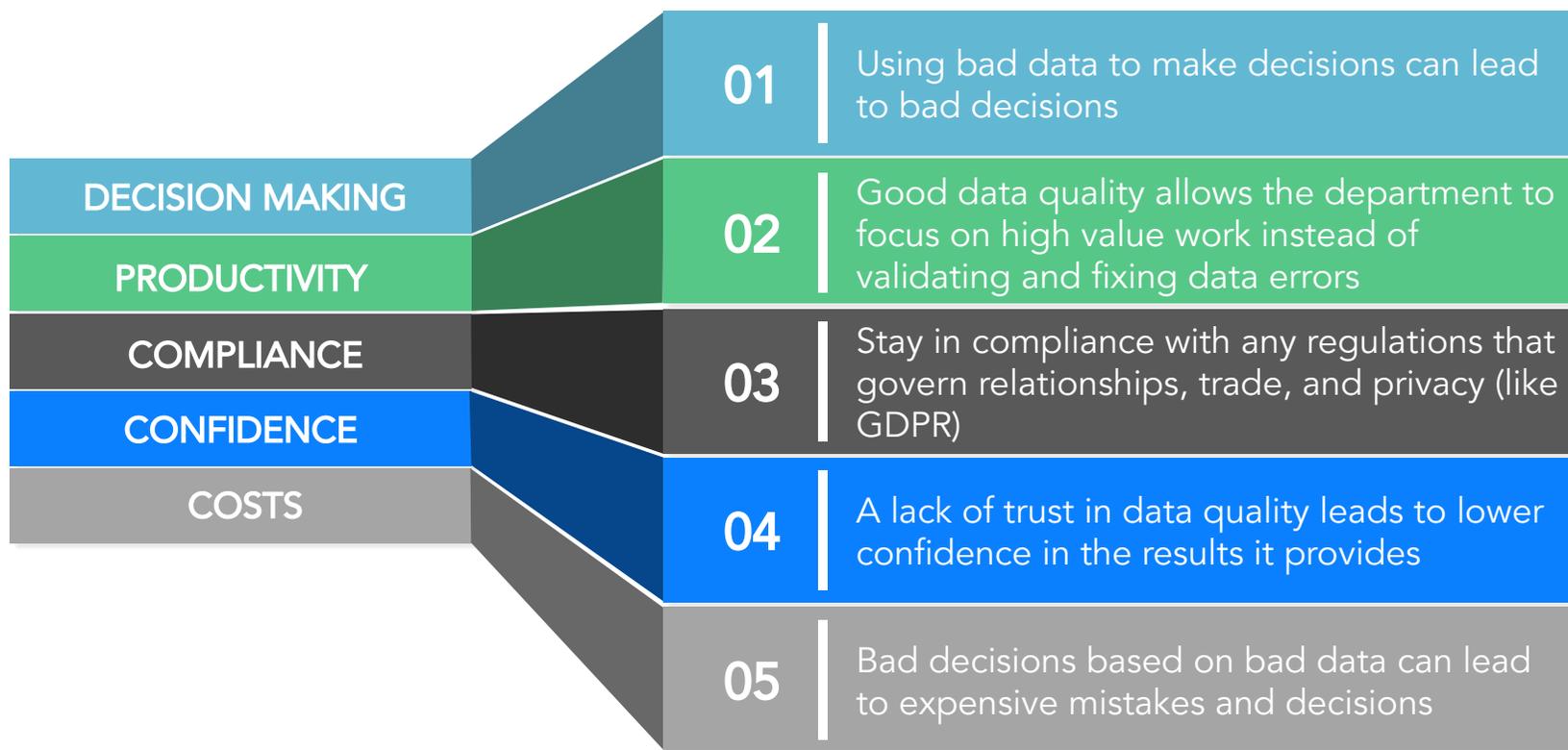


Inaccurate

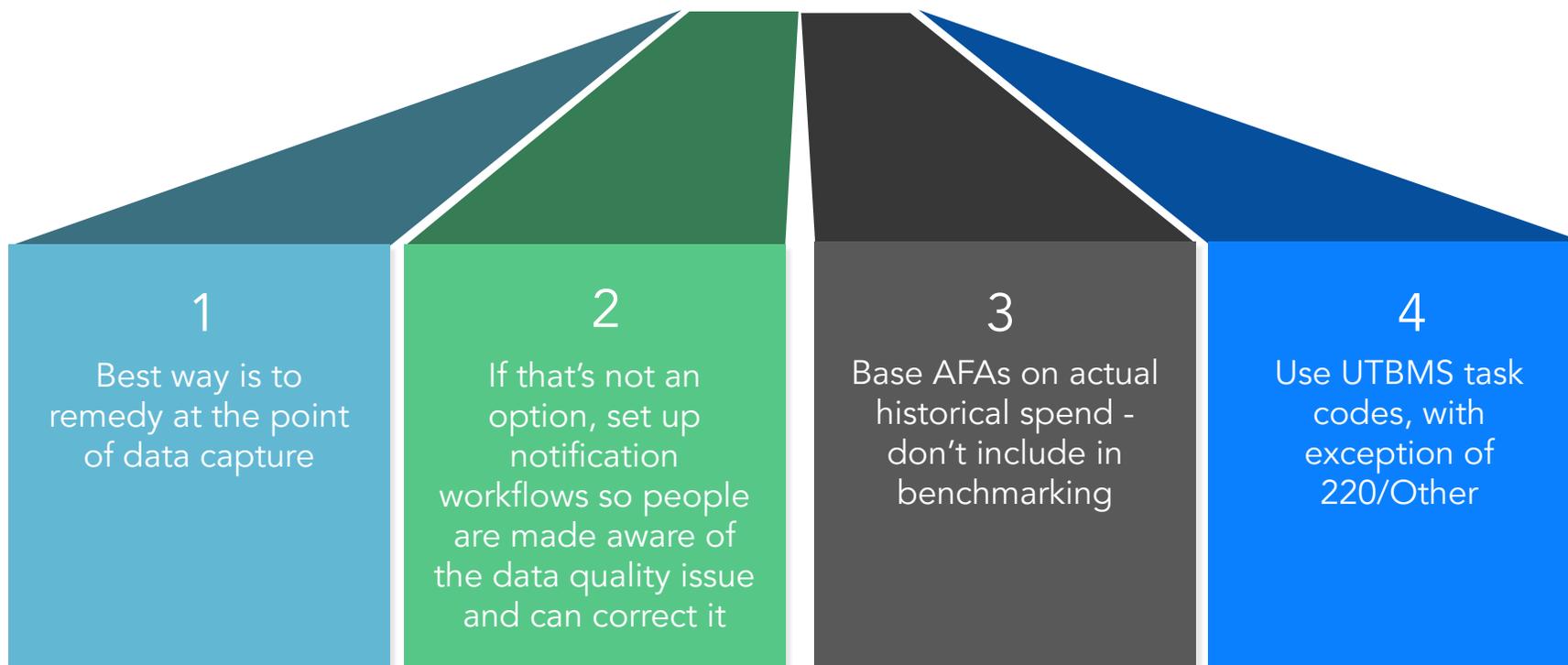
Information that has not been entered correctly or maintained



The Importance of Data Quality



Ways to Remedy Bad Data Quality



Why Use Reports for Process Efficiencies?



Drive Process Changes With Data

- 1 Calculate the potential cost-savings related to pushing work to lower cost resources
- 2 Use data to build the case for system implementations
- 3 Benchmark to understand how you match up against your peers
- 4 Outline processes and understand the resources it takes to do a task: drive out inefficiencies
- 5 Identify and understand the potential future risk that can come if process is not changed now

Questions?

Come Speak To Us @ Booth 10!

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