



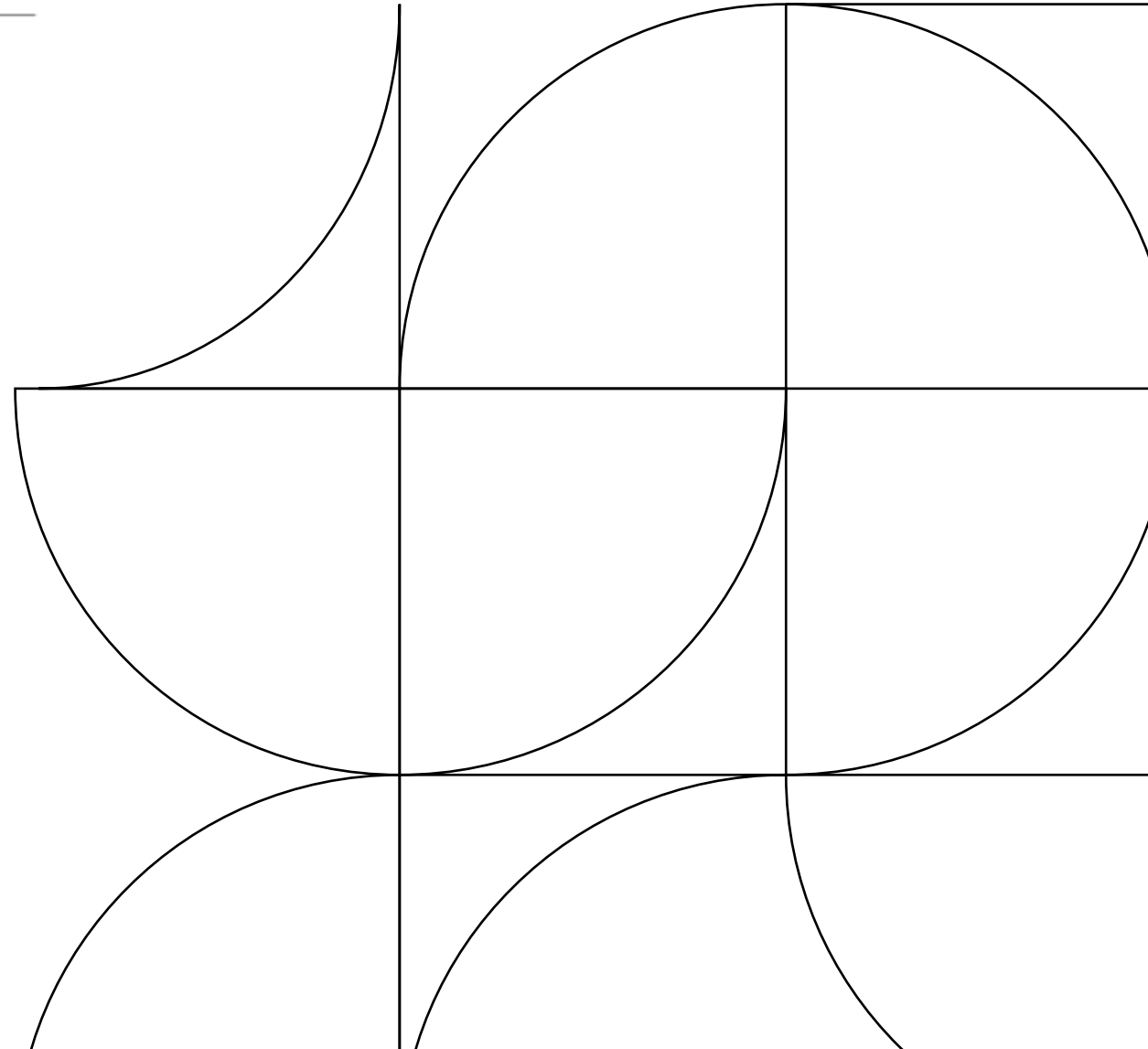
# Be Your Own Legal Ops Function

Eric Greenberg  
Heather Eskra  
Dustin Robinson

September 22, 2022

**Seyfarth Shaw LLP**

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# Speakers

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**Eric Greenberg**  
Partner, Real Estate  
Seyfarth Shaw LLP

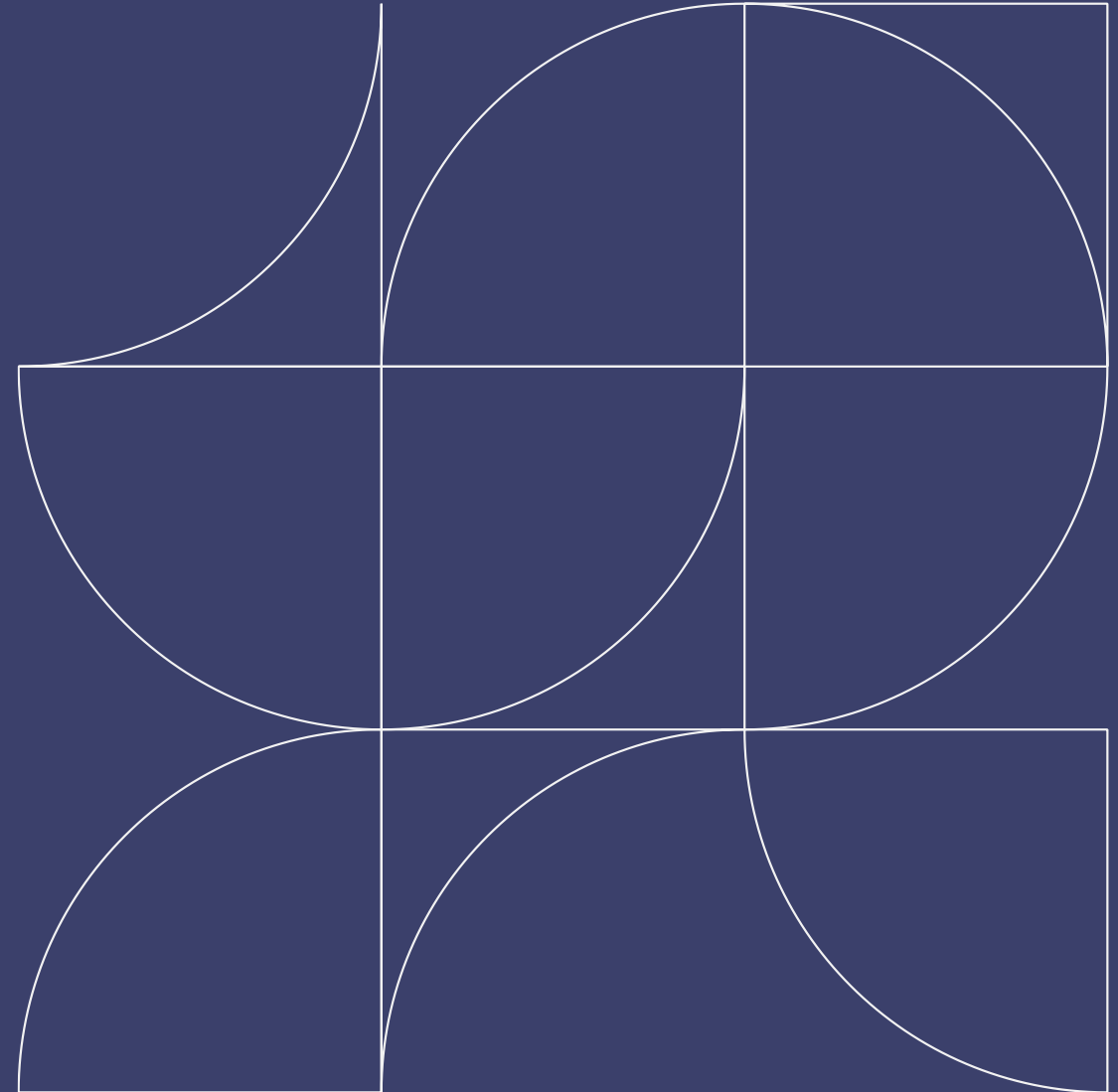


**Heather Eskra**  
Assistant Director,  
Lean Solutions  
Seyfarth Shaw LLP



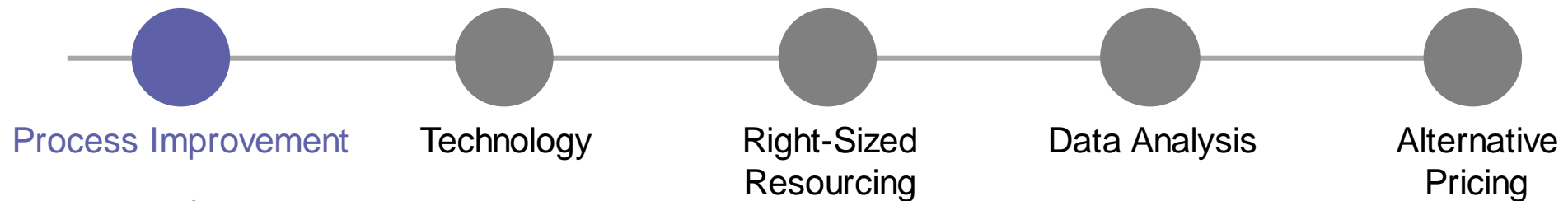
**Dustin Robinson**  
Senior Client  
Engagement Manager  
Seyfarth Shaw LLP

# Five Key Tools and Techniques



# Process Improvement

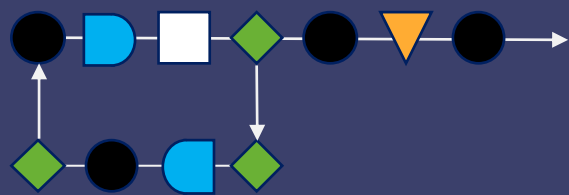
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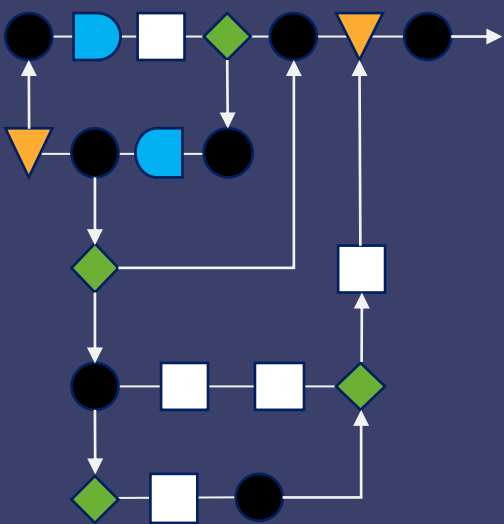
- How things are vs. how they could be
- Lean and Six Sigma disciplines
- Root cause analysis
- Process mapping
- Proper scoping and budgeting
- Project Management

# process maps – 3 versions

As we think it is



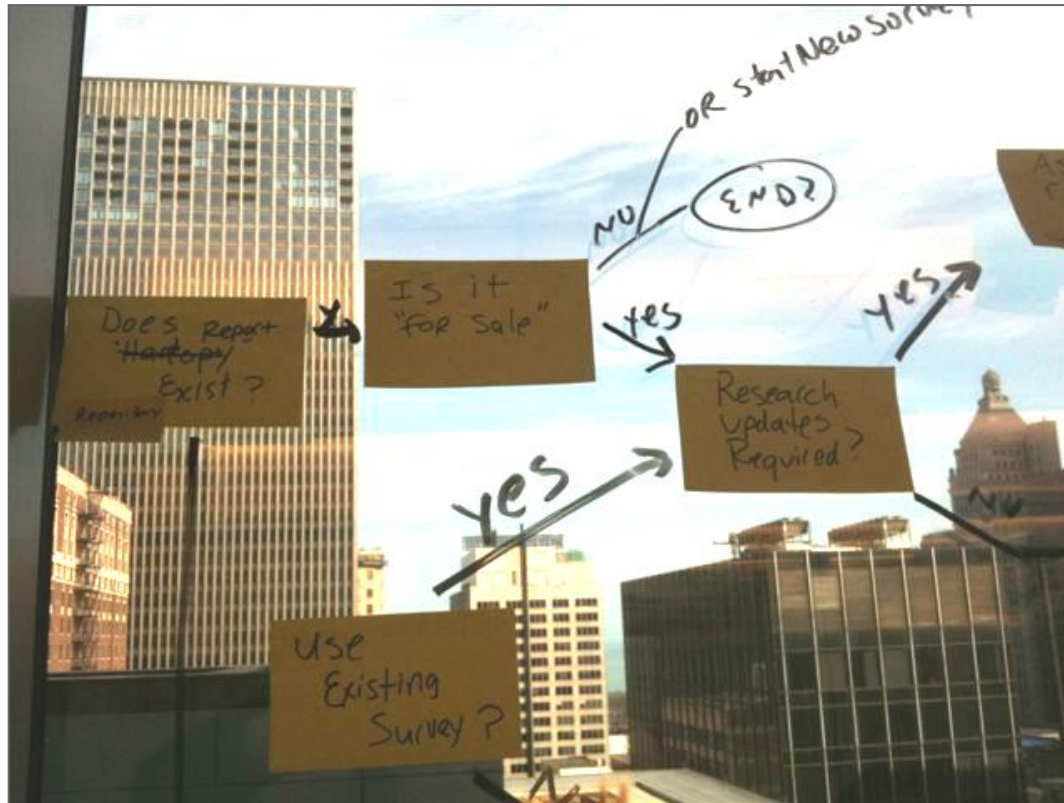
As it is

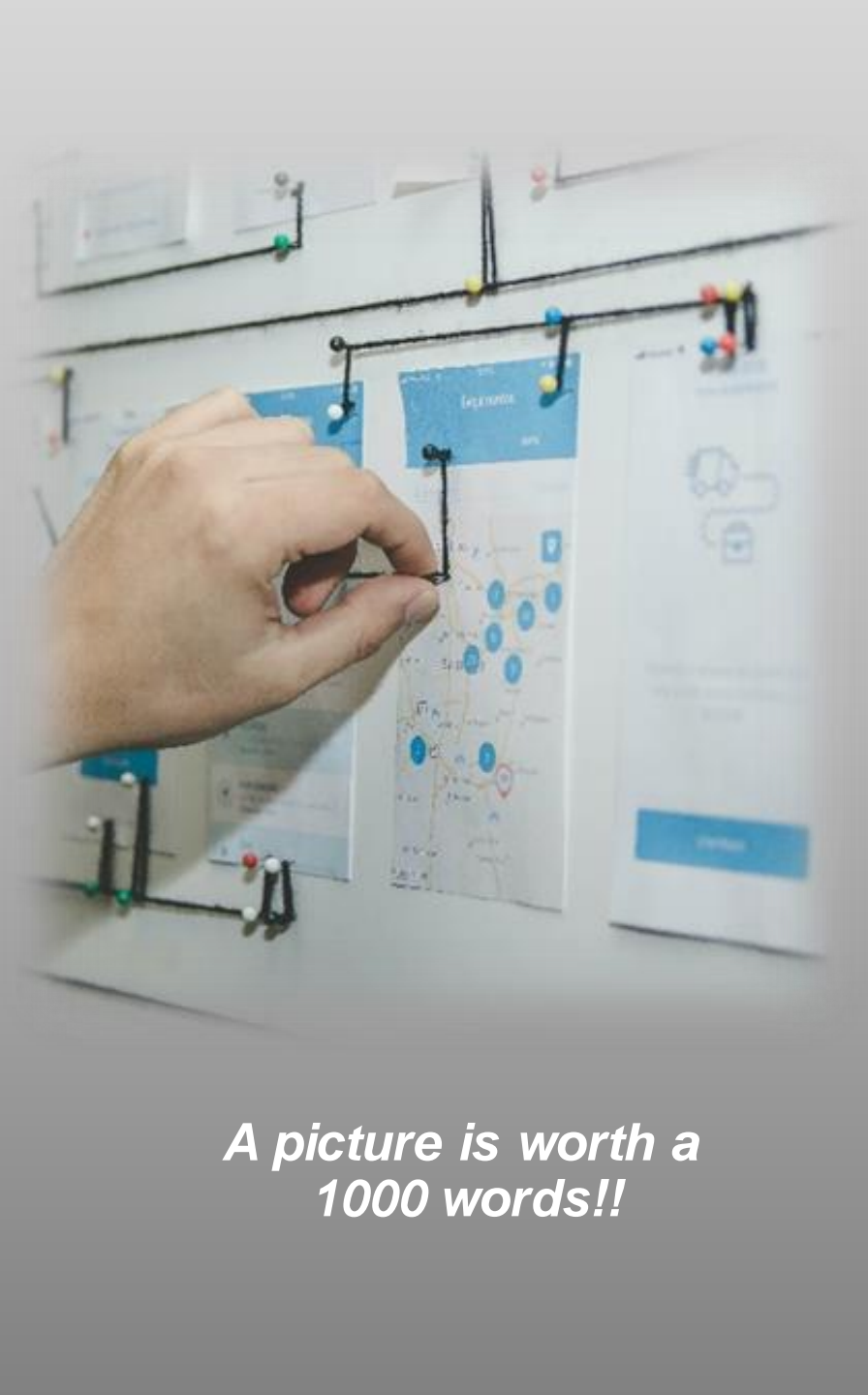


As it should be



# Easy to get started





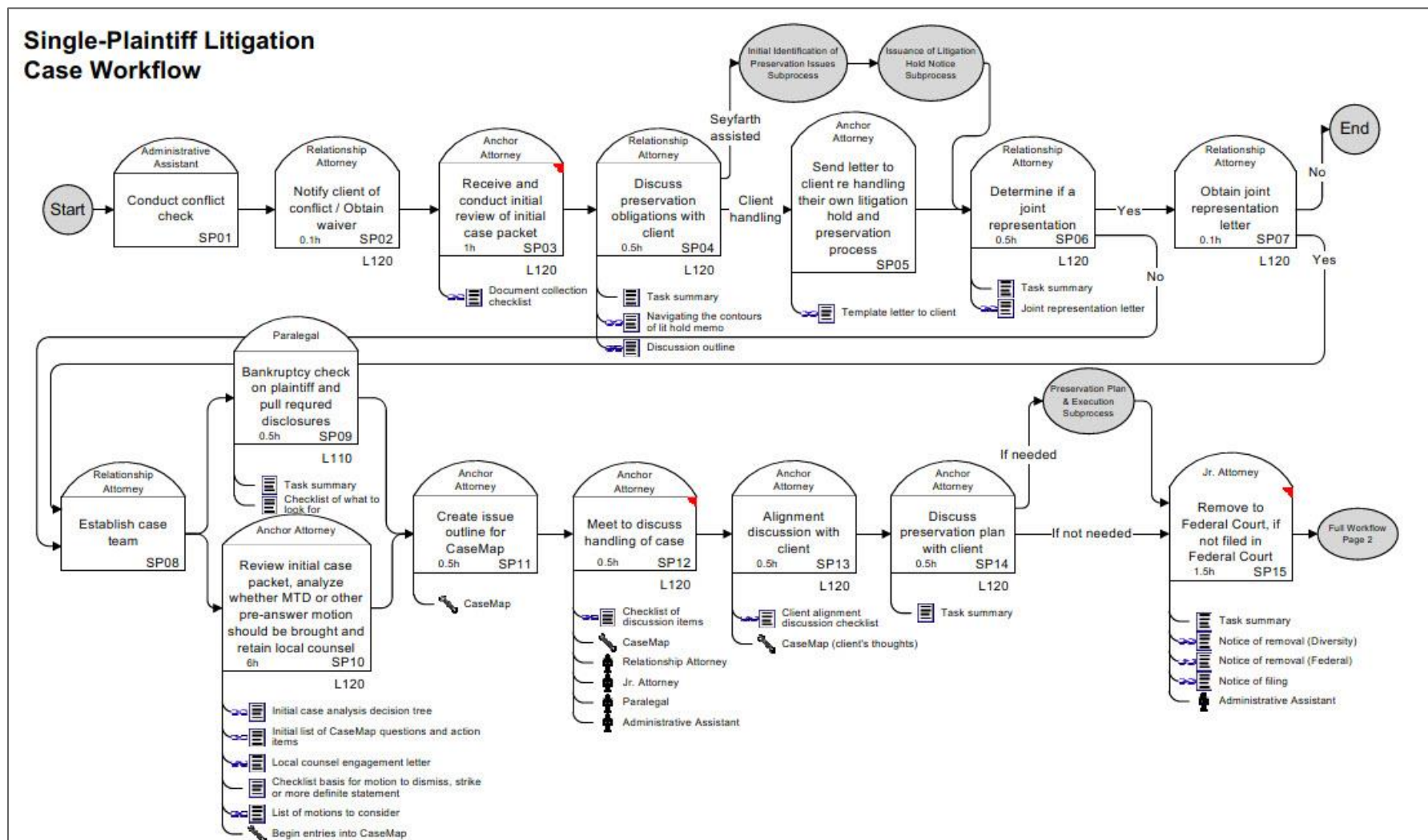
*A picture is worth a  
1000 words!!*

# What a Process Map Shows Us

- A process map is used to clarify and create a common understanding of the process
- A process map makes it much easier to identify process 'waste':
  - Roles & responsibilities
  - Bottlenecks
  - Unnecessary steps
  - Missing steps
  - Redundant steps
  - Rework
- Provides an effective communication / training tool

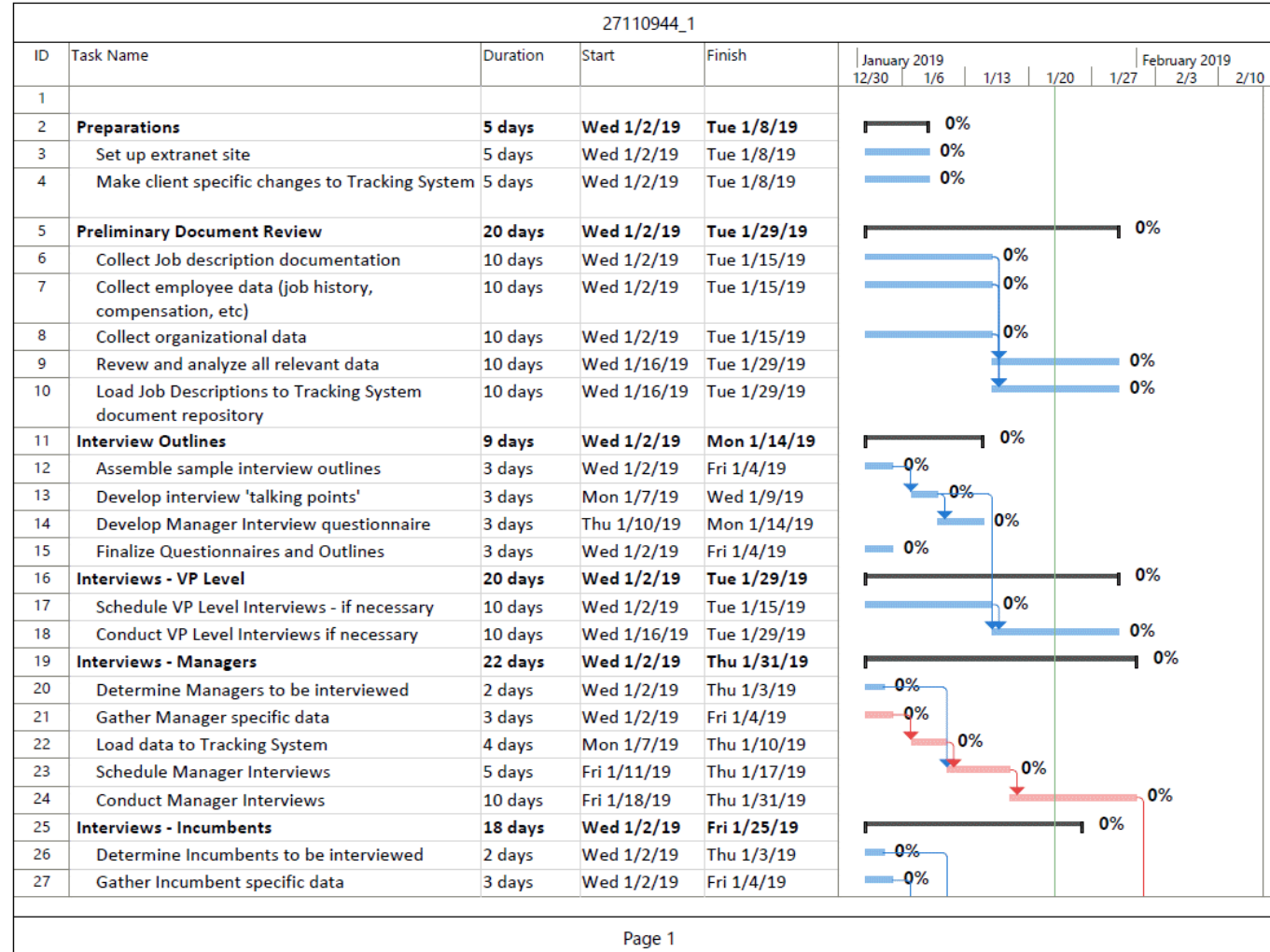


# Process Design



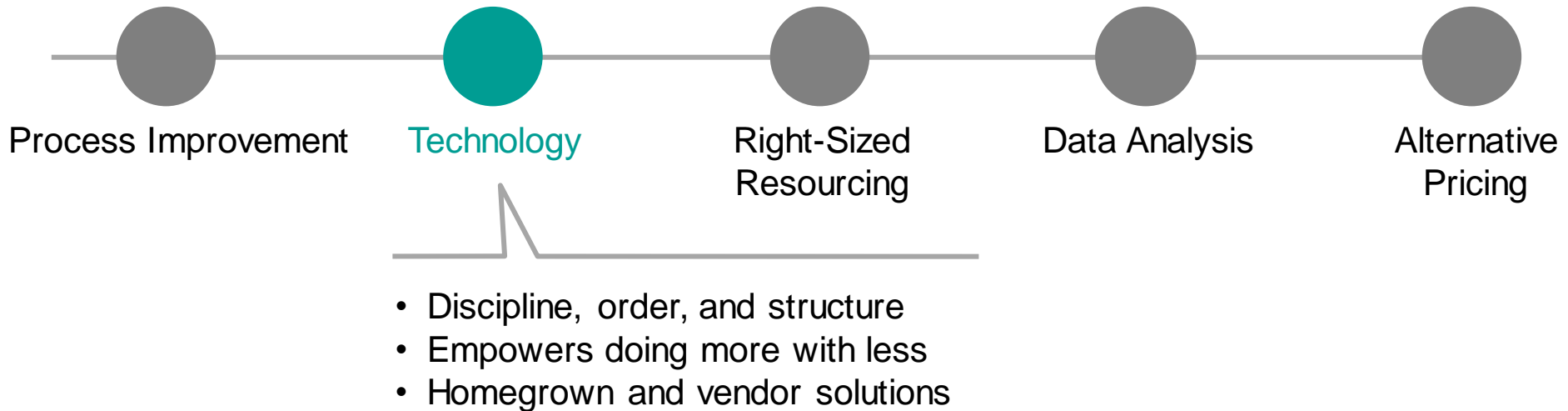


# Project Management



# Technology

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# Right-Sized Resourcing

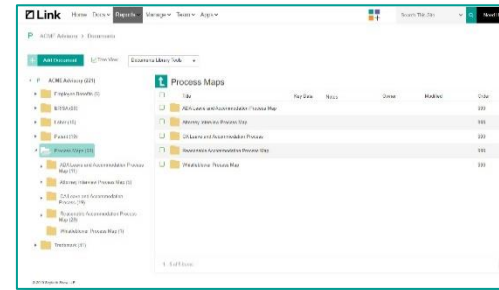
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- Tapping into the entire enterprise
- Leveraging SMEs where possible
- Outsourcing where it makes sense
- Continuous improvement and training





Real-Time Collaboration

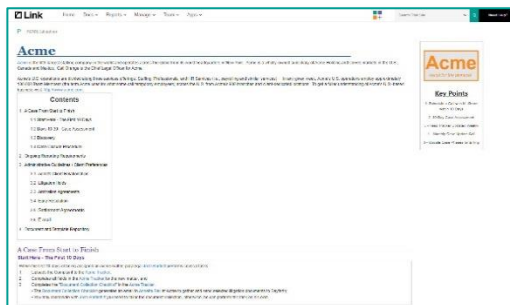


Information Accessibility

## Financial Transparency

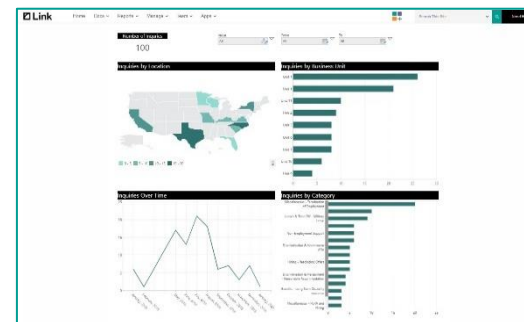


## Technology to underpin legal service delivery



Client Centricity

## Analytic Insight



## Portfolio Management

Case ID	Case Name	Case Type	Case Status	Case Location	Case Date	Case Description	Case Summary
10000001	Acme Corp	Contract	Completed	USA	2023-01-01	Acme Corp is a leading provider of legal services.	Acme Corp is a leading provider of legal services.
10000002	Acme Corp	Contract	In Progress	USA	2023-01-01	Acme Corp is a leading provider of legal services.	Acme Corp is a leading provider of legal services.
10000003	Acme Corp	Contract	Completed	USA	2023-01-01	Acme Corp is a leading provider of legal services.	Acme Corp is a leading provider of legal services.

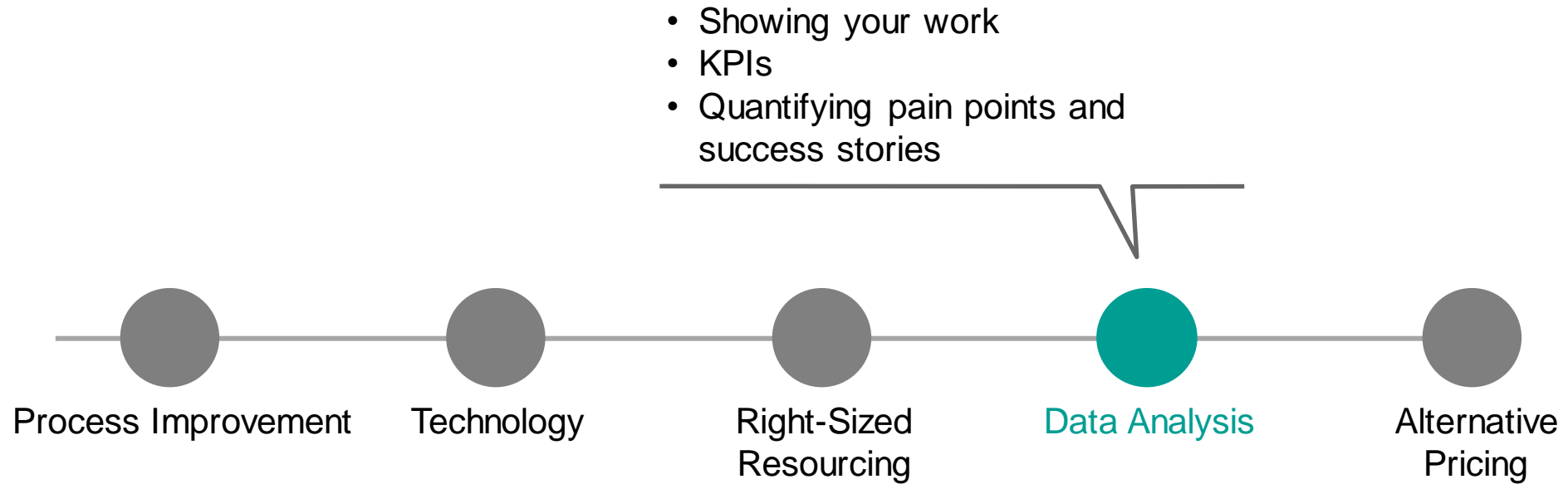
# Other Possible Resources

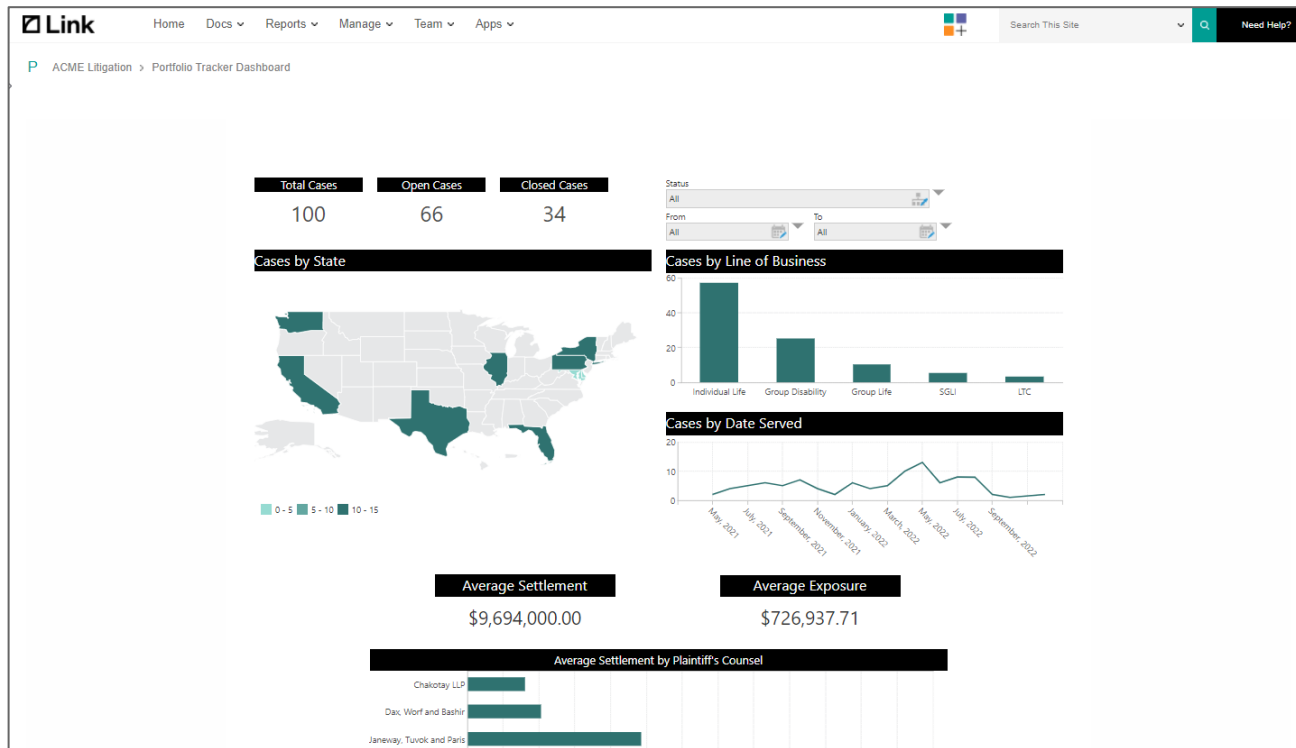
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- Microsoft Products: Excel, in particular, has a lot of power that is overlooked for organization and tracking purposes
- Smartsheet
- Fillable PDFs/templates
- SurveyMonkey
- Knowledge management resources (Practical Law Company, etc.)

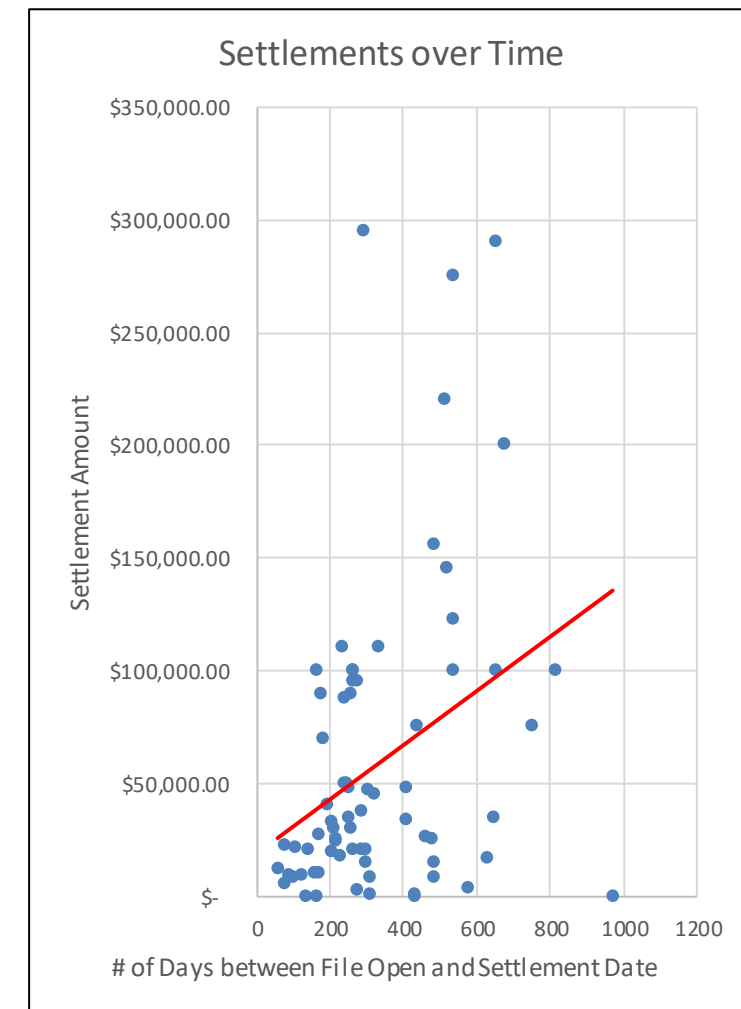
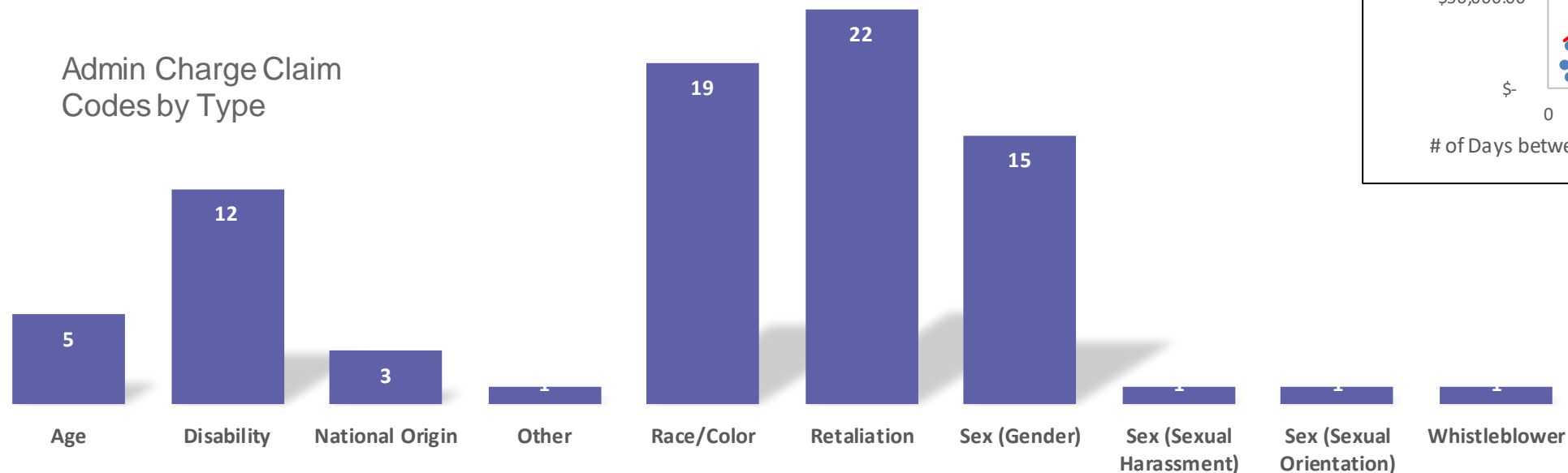
# Data Analysis

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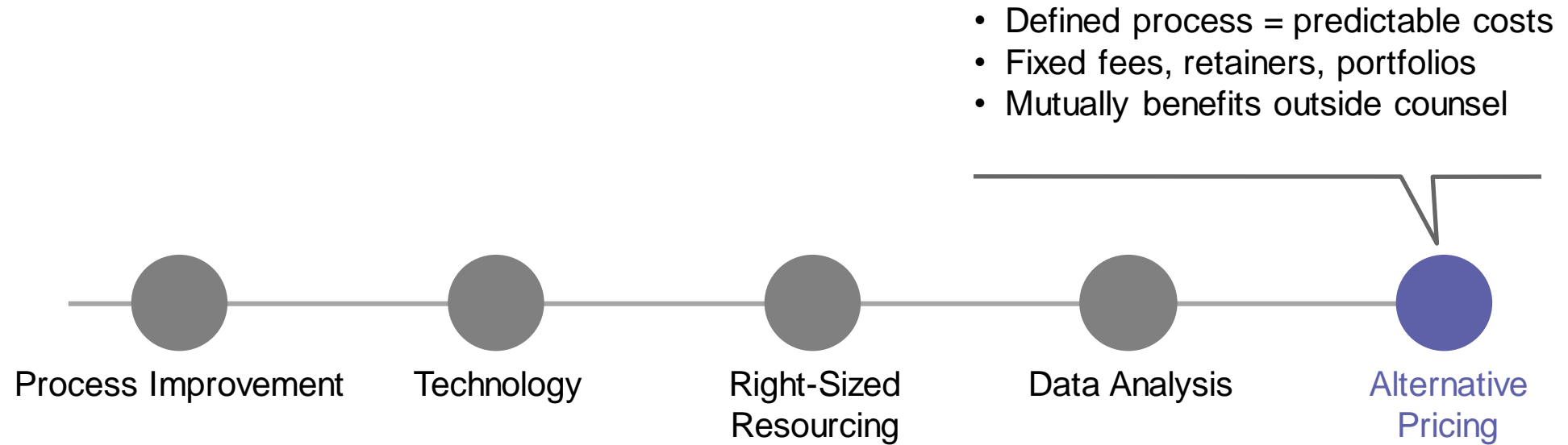
## Admin Charge Claim Codes by Type





# Alternative Pricing

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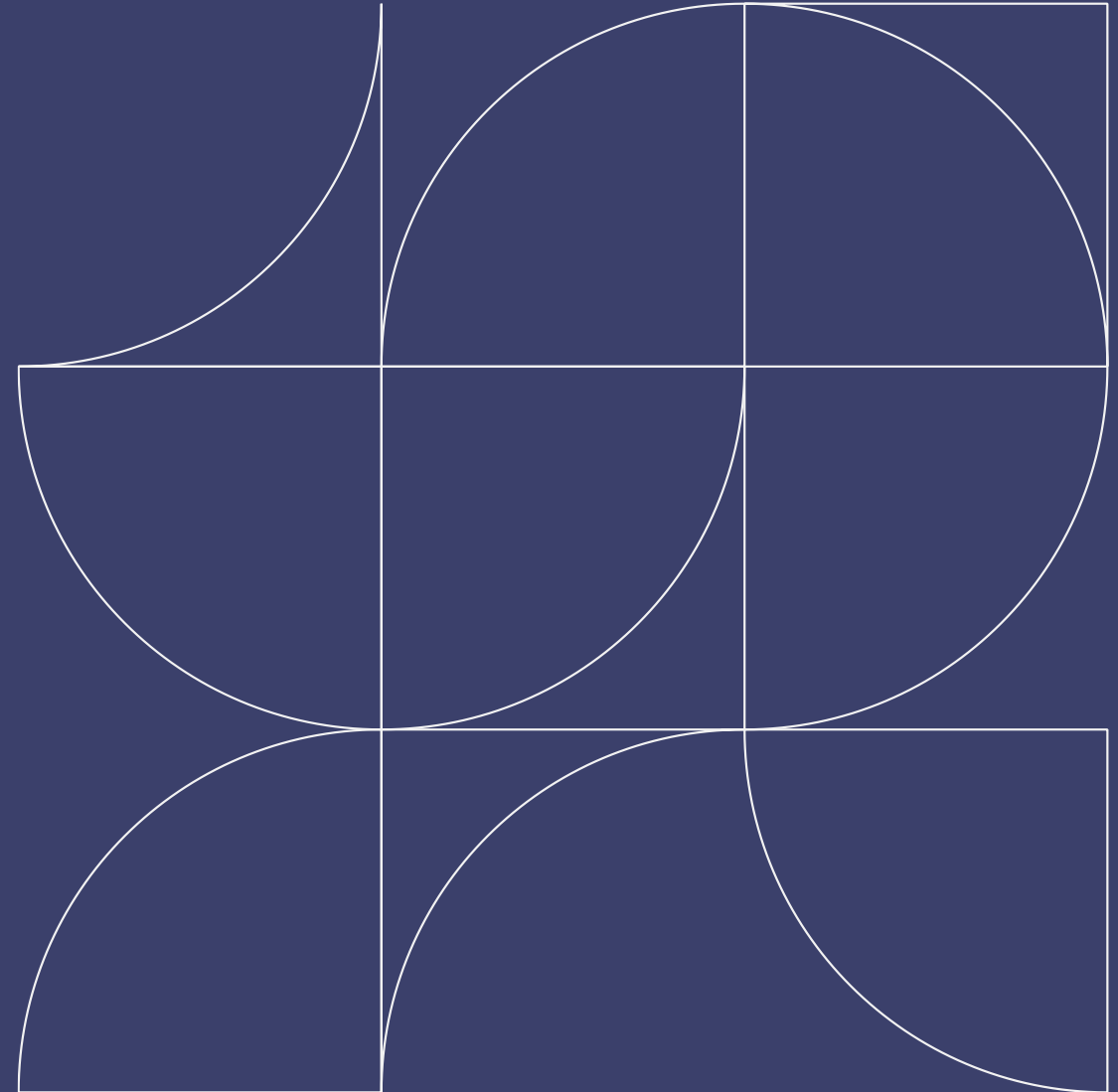
# Sample AFA Approach – Contracts (High Volume)

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- **Band 1.** Low risk contracts or “standard” contracts that use an existing form or agreement\*
- **Band 2.** Medium risk contracts or more complex/sensitive contracts that require adapting an existing form or agreement\*
- **Band 3.** High risk contracts that require subject matter expertise, involve multiple turns of a document and involve negotiations\*
- **Other.** Such as drafting an agreement from scratch

\*Bands 1, 2, and 3 at a progressively higher pre-determined Fixed Fee

# Lessons Learned from Real Life



# Lessons Learned – The Good and the Challenges

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- Large-Scale Contract Workflow Process
  - narrowing focus, deploying discrete modules with business buy in and use tools picked up along the way, like fillable PDFs/templates
- General Legal Email Inbox
  - lessons learned about establishing protocols in advance – SLAs and triage
  - the importance of change management
- Third Party Matter Management System
  - solutions have to be implemented while the plane is flying
- DocuSign
  - roll out solutions that make the business' lives easier

# Key Themes

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- Find ways to partner with the Business on these initiatives – conduct periodic listening sessions or satisfaction surveys
- Recognize a balance between day-to-day of legal practice and operational initiatives
- Importance of KPIs and look to all kinds of sources
- Change management starts from the top
- Look to outside providers for other examples of success stories - CLEs
- You are not alone in your challenges – look to the ACC!

# Thank You

