

 [Click to Print](#) or Select 'Print' in your browser menu to print this document.

Page printed from: [Corporate Counsel](#)

The Legal Ops Movement—From Duct Tape Triage to Full-Fledged Business Partnership

Susan Hackett , Corporate Counsel

May 8, 2017

The balance of forces in the legal universe may shift a little this week, as hundreds of law department leaders (and those vying for the honor of supporting their work) descend on Las Vegas for the [2nd Annual CLOC Institute](#).

CLOC stands for Corporate Legal Operations Consortium: it is the volunteer-driven network of law department operations leaders who bring their legal teams and corporate clients a diverse toolkit of business and technology skills, management and people expertise, and industry/data savvy.

Programs at this year's institute—which in only its second year, may boast 1,000 registrants—cover the widest possible gambit of topics. Registrants will include over 500 legal operations leaders from companies around the globe, plus a Who's Who of faculty, law firm, and law school students and leaders, as well as the top names in legal service providers. All of them will be working together and benchmarking practices in order to solve for X: X= what it is that corporate clients want and need from their legal teams to advance and succeed.

Last year—our first big institute—was big, and it also helped lay the foundation for CLOC. We solidified our four pillars—networking, education, changing the industry and embracing the entire legal ecosystem. The CLOC community was formed during the first Institute. It created the movement and the wave that this year's Institute is gliding in on. The Institute doubled in size since last year and we expect it to double in size again next year. If you look at this year's line-up, you can see the fingerprints of passionate and committed leaders in the legal industry ... this year's Institute is a direct result of a groundswell of engagement by legal operations leaders and legal service providers all over the globe.

- Connie Brenton, Chairman, CLOC

[Richard Susskind](#), everyone's favorite legal futurist, will keynote the first day's lunch and promises to take time to look up from his crystal ball to sign some books; programs and workshops will generate conversations on topics covering law firm convergence and AFAs, practical applications of AI technology, corporate legal diversity leadership and professional development/skill building, data—both security and MoneyBall analytics, workflows, project and process management innovations, collaboration and teaming projects, law firm performance evaluations, budgeting and strategy, contract management systems and e-discovery. With over 75 sessions listed, you may find the full [agenda online](#) and faculty listings to be informative reading. And you can follow news from the Institute on Twitter at [@cloc_org](#) and [#CLOC2017](#), or via *Corporate Counsel's* continuing coverage.

Intro to the Ops Function and Role:

So why does this group seem to matter so much? It seems that legal ops leaders and their pet projects garner wildly disproportionate coverage from the legal media these days given the size of their head-count as a part of a much larger profession made up of folks practicing law, eclipsing coverage of even the more prestigious general counsel we usually love to read about.

So let's take a deeper dive into who these folks are and why they seem to be the emerging leaders of the in-house world. "Legal Ops" may be a new term for some of you reading this, but the role and function are not—while not very visible until lately, there have been operations leaders organizing administrative and managerial functions in legal departments for decades.

In today's departments, legal ops leaders usually carry a number responsibilities, and most departments customize and scale their functions to fit their department's particular needs and size. Some larger departments in industries like finance or insurance have operations teams that number in the hundreds; many more companies have only one or two people in the role, often with varying levels of authority in the chain of command: from those with a seat at the right hand of the general counsel, to those who report to others in the department further down the line.

The reality is that while this function is not new, the size and importance of the ops portfolio is increasing. And how. If you look at [CLOC's recently released resource](#) to help define the variety of functions appropriate for a Legal Operations/Chief of Staff to include in their purview, you'll find:

- Strategic planning
- Financial management
- Vendor management (including outside counsel relationships)
- Data analytics and metrics
- Technology
- Alternative support/staffing
- Knowledge management
- Professional growth and development
- Communications
- Global data governance/records management
- Litigation support
- Cross-functional alignment

The [ACC resource](#) that provides a counterpart compilation of legal operations job descriptions makes it clear that these varied roles are not easily executed by just one person and these skill sets are not usually present in every department member's toolkit, especially those whose professional training was only in the law. This means that those performing this role are often expert in only a few of the functions they are responsible for: hence, organizations like ACC and CLO become vital in providing both educational programs and training, as well as networks and resources that can help legal ops leaders—whether lawyers or professionals from other backgrounds—step up to this incredibly multi-disciplinary management role.

Today's ops leaders—compared to their counterparts of 5 or 10 years ago—are more visible, more responsible, better respected, and a whole lot more sophisticated. And their numbers are growing: in

the [2017 Association of Corporate Counsel \(ACC\) CLO Survey](#), 26% of general counsel surveyed reported having delegated legal operations responsibilities to an ops team or department member, up from 16% just one year before.

When I was at ACC working with then-Associate General Counsel [Renee Dankner](#) on a project to bring together people performing this role back in the early- to mid-2000's we couldn't even find many, nonetheless quantify their number: in part because operations responsibilities were diffused and spread over many people whose titles didn't reflect their role or leadership, and in part because there were just so few people who performed operations functions as a full-time job or even as a long-term dedicated leader. Responsibility for outside counsel management, technology decisions, professional development, budget and spend, department metrics, project and matter management was shared by many lawyers (usually) in the department, not coordinated in one central function.

Many of the first full-time operations leaders I met were in the financial services/insurance industries; they were not lawyers, but experienced executive managers assigned to the legal team to provide financial and technology services to assure proper compliance with data and regulatory rules, as well as complex corporate accounting requirements. Others were lawyers in larger manufacturing, tech, and service companies, who'd been appointed to fulfill the ops role while they were also carrying a large legal portfolio. While the number of lawyers leading dedicated operations teams is still significant, the fastest growing segment of this community are those who bring critical experience and skills that many lawyers lack: people management, technology and data savvy, financial and executive skills, and so on. Their challenge is to learn the nuances of the legal side, just as the challenge for lawyers in this role is to unlock their inner business leadership potential.

The person most responsible (to my mind) for pushing forward the need for those first networks of both lawyers and business professionals leading operations functions was Janine Dascenzo, who was an associate general counsel in the GE legal department (she's now the general counsel of [Current, Powered by GE](#) in Boston). She was assigned to the role of focusing on improving department efficiency and productivity without any kind of playbook to rely on and well over 1,000 lawyers to herd; like many of those early leaders, she felt that she was making it up as she went along, even though she worked in a company that is renowned for its focus on innovation and management practices. Back then, applying business concepts to legal work was pretty much unheard of. Janine relayed: "Being Associate GC at GE with operations as part of my responsibilities was akin to being the Managing Partner of a massive law firm" ... but doing it part-time and without the operating budget, benchmarks, or delegated authority to execute seamlessly. A common joke amongst the early adopters at our first meetings was that the best title for legal ops leaders wasn't "Chief of Staff" but "Chief of Stuff"; it was often lamented that the legal ops toolkit back then relied heavily on duct tape.

[Alex Dimitrief](#), Senior Vice President and General Counsel of General Electric, watched the GE ops function under Janine and her colleagues bloom in a manner that's consistent with what many of us observed over time as the ops function grew:

I've been at GE for just over a decade, and so I've been fortunate to watch a succession of great leaders work to develop the legal ops function. When I joined GE in 2007, our operations leaders were focusing, as many other company management folks were, on what we could learn from the quality movement and continuous improvement cycles; as GE's litigation chief, I was most interested in our team's focus on more effectively managing our lawsuits, our outside counsel spend and new e-discovery technologies. Now, as General Counsel, I'm responsible for an even broader portfolio of client service, practice management, enterprise risk and legal issues. So I'm working with an ops team that is on top of all kinds of topics, from emerging technologies such as predictive analytics and AI to outside counsel relationship, convergence and spend initiatives.

None of this happens without our operations innovators—people like Janine Dascenzo (now the GC of Current), Deb Lloyd (now the GC of Water), Dan Hendy (our Associate GC and

operations lead) or Tara Plimpton (the GC of Energy Connections). These creative and imaginative leaders have vanquished any doubts that the rest of us may have harbored about whether sophisticated and cutting-edge operations ought to be part and parcel of our legal department's core mission.

Janine's early experience rang true for many others in those first network meetings in 2006-11: those who gathered were sometimes most excited by simply commiserating with others who were experiencing the same challenges and working to carve a similar path in their companies. Leaders from Allstate Insurance, Clorox, Liberty Mutual, DuPont, GlaxoSmithKline, McDonalds, Goldman Sachs, General Motors, Fidelity Investments, ConocoPhillips, Fannie Mae, Bank of America, Pfizer, HP, Proctor & Gamble and others, convened a few times each year to talk about moving the operations function forward.

And several important mainstays in the group include people you'd recognize in CLOC's founding leadership. [Connie Brenton](#) (head of legal ops for NetApp) is the Chairman of the Board of CLOC today, but she was one of the pioneers of those early informal discussion groups, too, back when she was the legal ops leader for Sun Microsystems (which was bought by Oracle, to which she moved). She will be at the center of CLOC's activities at this Institute this week, alongside [Lisa Konie](#), who is the ops leader for Adobe.

[Mike Dillon](#) knows both Connie and Lisa—Mike was the general counsel of Sun Microsystems who hired Connie to that early role, and is now the GC of Adobe, where he continues to push forward top legal operations practices with Lisa. Mike supported the idea of strong legal operations long before it was widely-accepted because he understands its value, not only to the general counsel, but to the entire legal and corporate enterprise:

To be successful in-house, your legal team needs to be a fully integrated part of the business. This means managing the legal organization as a business. To do so requires talented operations professionals who have expertise and experience in organizational efficiency and effectiveness. My career and those of many others have benefited immensely from the leadership of Lisa and Connie, who have helped bring this business focus to the in-house legal practice.

The Rise of Legal Ops

A distinguishing characteristic of the modern legal ops role is its focus on not only improving the internal workings of the legal team and better aligning their "partnered" relationship with their corporate clients, but also their collaborative relationships with what CLOC leaders often refer to as the operations "ecosystem": the law firms, technology vendors, law schools, legal support and consulting practices, staffing firms, legal media, and professional organizations (such as bar groups, ILTA, legal leadership forums, and more) who represent all aspects of the working parts of the legal profession. As leaders in the value movement, and those most interested in improving the efficiency, productivity and results delivered to their corporate clients, legal ops leaders must also cultivate, push and pull from those on whom their law departments rely.

Many of those on the CLOC leadership team are representative of this facet of collaborative operations philosophy. Mary Shen O'Carroll is Head of Legal Operations, Technology and Strategy for Google's legal team.

From the very first CLOC meeting to this year's Institute, I have always felt such an immediate connection to others in this group. This role is challenging and you are met with resistance every step of the way. With CLOC, we have this community of like-minded people who are all willing to help each other out. The collaboration on initiatives or on the members' email forum is like nothing I've ever experienced. People in my legal department at Google can wonder out

loud about how others are doing something and then within a few hours, I have responses from countless other companies. It's truly an invaluable resource and community.

Mary's previous work experience includes time with a major law firm as the leader on firm profitability initiatives and experience in disruptive technologies. So her focus is shaped by the strength of her understanding of how value is defined in both the firms that serve Google and in the law department initiatives she leads to develop solutions that better align with the needs of her sophisticated and high-tech-minded corporate client.

Recently, I was fortunate to sit in a room with a number of ops leaders from Philadelphia-area law departments, hosted by [Reese Arrowsmith](#), Vice President of Legal Operations for the Campbell Soup Company (and newly-appointed leader of [ACC's Legal Operations](#), the now-formalized member network carrying forward ACC's leadership in this space) at Campbell's HQ for an event sponsored by [Kim Technologies](#). The purpose behind the meeting and one of Reese's primary interests in hosting was to help promote the wild and whacky notion that law departments are now sophisticated enough to assume responsibility for instructing technology providers on exactly what they want and how they want it, in order to shape the technology products they want to be available in an open marketplace. And as Robert Farina, CEO of Kim Technologies will tell you: Kim sponsored this session specifically to listen, learn and be enabled to respond.

While law firms used to be at the undisputed center of the legal marketplace, a whole new generation of vendors are focusing full-time attention to law departments. And the operations leaders who guide law department strategy and day-to-day administration are their undivided market focus for the future: this strategy suggests that where legal ops goes, so goes every other service purchaser and provider—from law firms to LPOs to legal technology vendors. That's the reality of a buyer's market.

Heck, legal ops functions in companies such as DuPont and AIG (See, e.g., *Corporate Counsel's* coverage, [here](#) and [here](#)) are now focusing their legal ops energies on generate revenue for their companies (as opposed to only spending it on their behalf). Legal ops is a true movement: from duct tape triage to full-fledged business partnerships designed to advance their clients' businesses.

Conclusion

Hundreds of legal operations leaders are at the heart of CLOC's volunteer-based efforts to amplify and far more clearly articulate the voice of the client in corporate legal work. There are many leaders who work in CLOC who also participate in ACC's Legal Operations network, as well. One of the great rants of the value movement over the past 10 years is that while corporate legal teams have gotten better at demanding greater value, they've often fallen short of defining and rewarding what they want, or modeling desired behaviors in their own operations. That's about to change.

That rumbling noise you're hearing in Vegas this week? It's the Voice of the Client. And it's getting louder and clearer.

Susan Hackett is the CEO of Legal Executive Leadership, LLC, which she founded in 2011 after serving for 22 years as the Senior Vice President and General Counsel of the Association of Corporate Counsel (ACC) in Washington, D.C.

Copyright 2017. ALM Media Properties, LLC. All rights reserved.