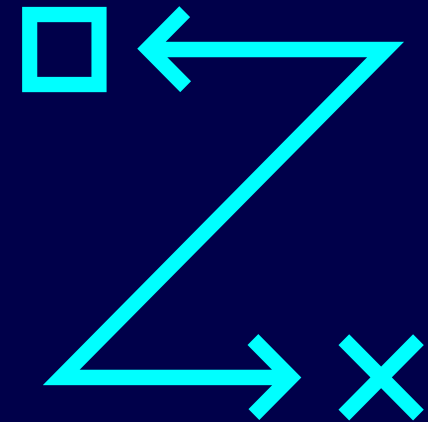
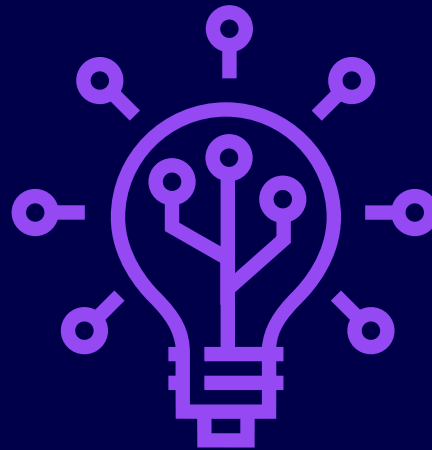
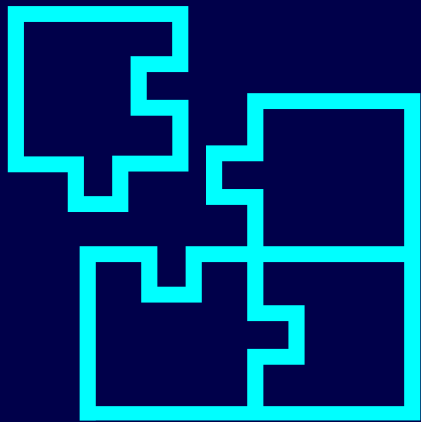


Front-Foot

Demonstrating Value

LEGAL ROUNDTABLE WHITE PAPER



How much does your organisation value Legal?

And how can you elevate your standing?

In March 2024, David Curtain, Director of Front Foot Law, led a roundtable event with ACC members to discuss how to prove and create value.

During this interactive session, he drew on his experience working with in-house legal teams worldwide and invited others to share invaluable insights.

A group of more than 40 Chief Legal Officers completed live surveys to gain a broader understanding of common challenges, including:

- proving value
- anticipating business needs
- budgeting for more resources
- bridging the gap between legal and the client

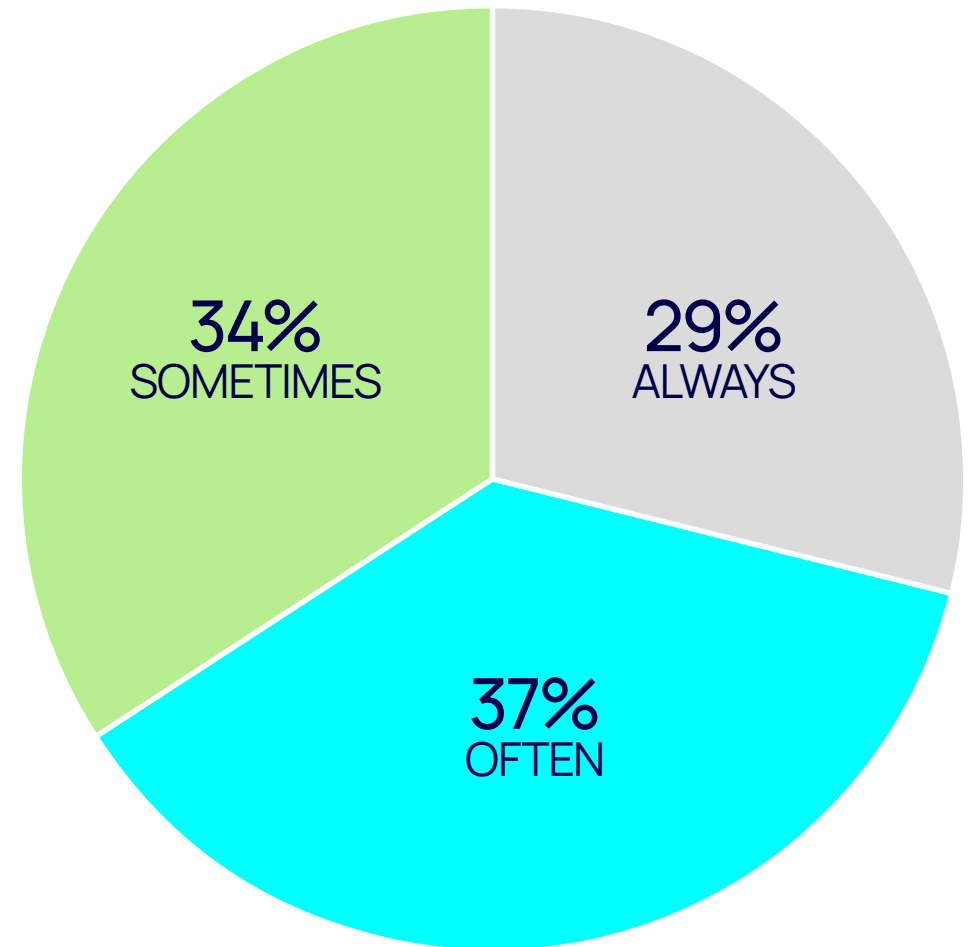


Effective
Close Valued
Respectful Trusted
Demanding **Excellent**
Collaborative Productive
Codependent Healthy Collegiate
Evolving Casual Engaged
Positive

How would you describe the relationship between your legal team and your internal clients?

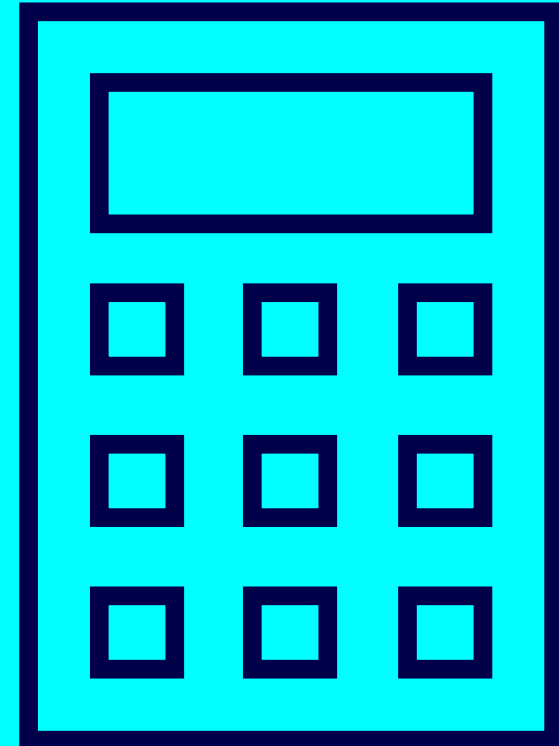
How often does your legal team have more work than it can manage?

- 29% Always
- 37% Often
- 34% Sometimes
- 0% Rarely
- 0% Never



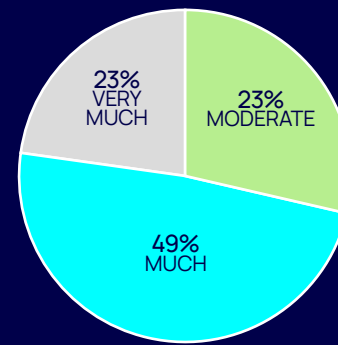
TOPIC 1:

Demonstrating value

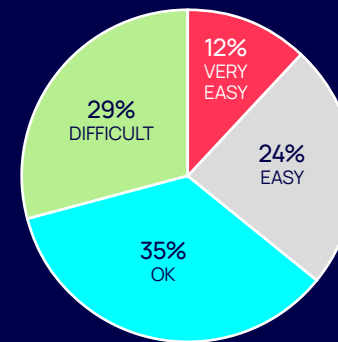
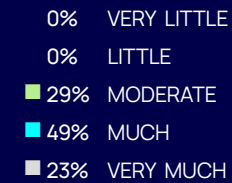


How do we demonstrate our real and valuable benefits to an organisation?

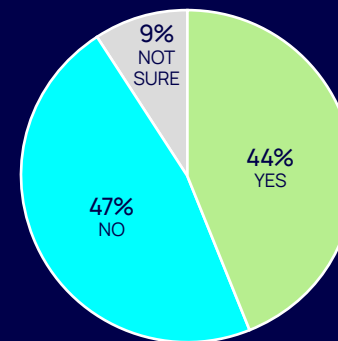
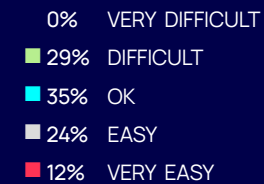
Most attendees agreed that clients do not understand the legal team's role and, therefore, struggle to value it. For example, a sales division can demonstrate a 30% increase in sales, but the legal team's contribution to the bottom line can be harder to quantify. This has led to a reticence in promoting the legal teams' successes within the business.



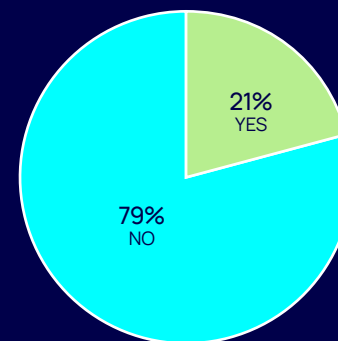
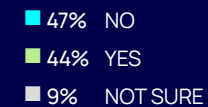
How much do your internal clients generally value the work done by Legal?



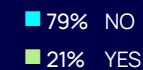
How easy do you find it to demonstrate the value your legal team adds to your organisation?



Do you collect reportable data about your legal team's performance?



Do you share reports about your legal team's performance with clients?




Solutions:

The roundtable group discussed ways to demonstrate value and measure performance.

David advised attendees to use data, engaging in constructive conversations about the reports' meaning. David advised attendees to use data to provide clients with insights on how to inform decision making and improve operational efficiency. The language of business is numbers, so we need to speak this language too.


The Front Foot Academy Module [Proving the Value Legal Adds](#) provides actionable tips to enhance legal's standing, while the [Legal Data Analytics](#) Module includes a cheat sheet on how to collect and share data with clients.

Front-Foot Academy  **MODULE 3 CHEAT SHEET**

Legal Data Analytics

BENEFITS


How does it help Legal teams & clients?




- Assess actual performance vs target
- Identify priorities for improvement
- Identify the causes of issues
- Make better decisions about what to improve
- Test adequacy of services
- Share updates within Legal & with clients
- Help clients understand Legal work & issues
- Empower Legal to lead constructive discussions

GUIDANCE


How do you do it?

Clarify the purpose 


- Clearly identify the specific questions to be answered
- Clarify your goals & why they're important
- Goals define data to collect
- Don't just collect data & then reverse engineer goals

Select data to analyse 


- Select data that is directly relevant to your identified goals
- It's generally easier to work with structured data (quantitative) than unstructured (qualitative)
- Take a pragmatic approach that fits your available resources

Collect existing data 


- **Systems:** financial, contracting, matter management, automation etc
- **Non-system:** legal reports, vendor records, reports by other teams relevant to Legal

Collect new data 


- Surveys
- Interviews
- Sampling
- Configure reports from existing systems for your specific goals

How much data do you need? 


- Start with small & manageable
- Choose a few categories most likely to produce useful insights
- If it's too complex, you'll either get bad data or no data

How often should you collect data? 


- **System:** Live feed or extracted?
- Live dashboards save time if set up correctly
- **Non-system:** How often will data be collected? Who will do this?
- Choose a frequency suited to your situation

Current vs target state 


- Benchmark current state
- Establish new target metrics
- Update previous targets
- Track ongoing performance
- Extract insights

Reporting 


- Current vs target performance
- Concise summaries of key insights & next steps
- Compare corresponding periods
- Seek feedback & adjust if needed

Sharing insights 

- Share reports & insights within Legal & with clients/executive
- Show progress on Legal KPIs
- Explain & overcome obstacles
- Constructive discussions about improvement options

Responding to the data 

- Track trends over time
- Share information about implications for Legal, specific clients & the wider organisation
- Tailor reports to each audience
- Invite questions & discussion

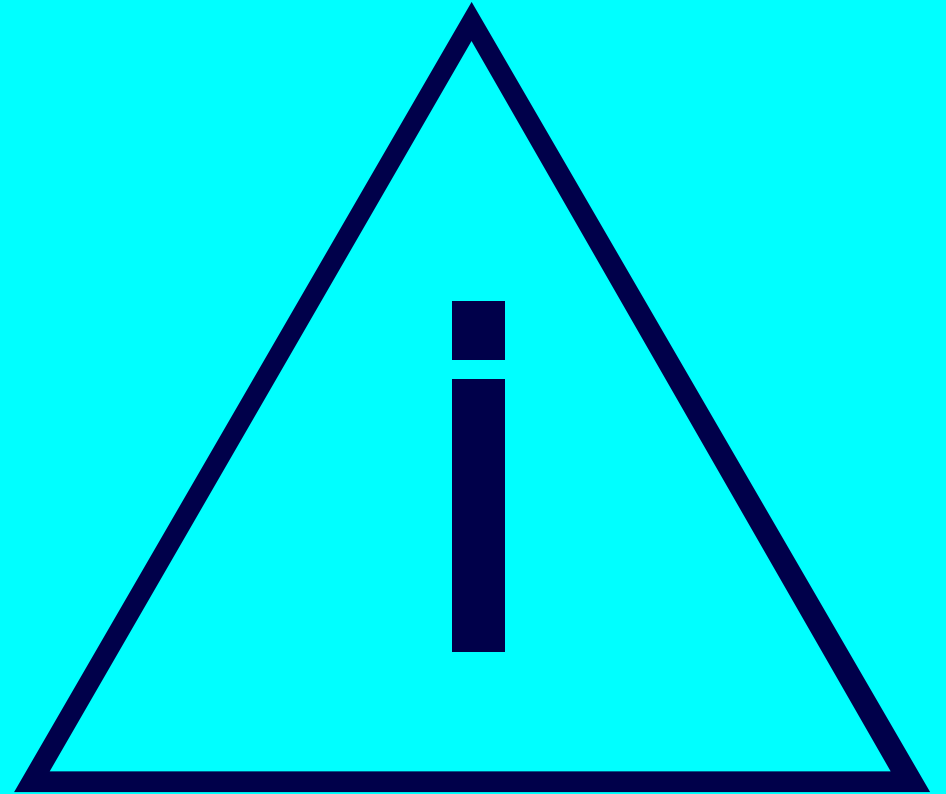
Ongoing questions to consider 

- How useful are the insights?
- Is it helping achieve identified goals?
- How much is it driving decision-making?
- Have new priorities emerged?
- Do we need to adjust?

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TOPIC 2:

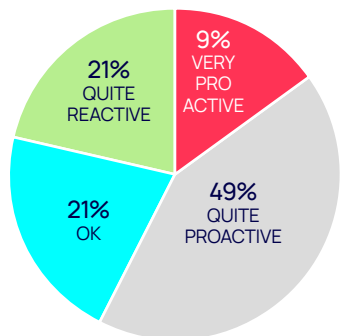
Anticipating business needs



How can you proactively identify legal challenges and opportunities facing your organisation?

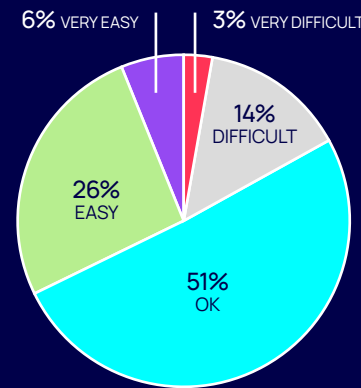
The consensus was that lawyers, for the most part:

- often find it hard to lead rather than support change
- are not as involved in the organisation's strategy
- do not forecast legal team requirements
- prioritise macro changes in the law over client concerns



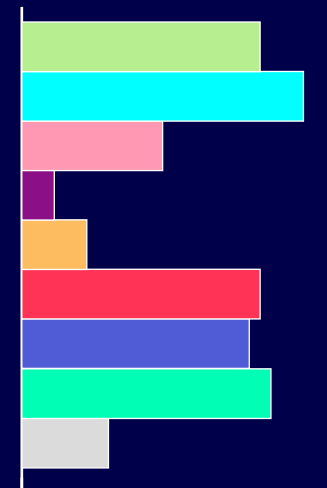
How proactive are you in identifying emerging legal challenges and opportunities relevant to your organisation?

- 9% VERY PROACTIVE
- 49% QUITE PROACTIVE
- 21% OK
- 21% QUITE REACTIVE
- 0% VERY REACTIVE



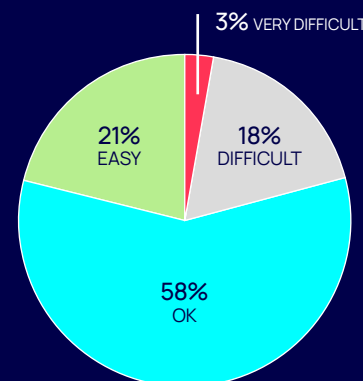
How easily can you proactively identify your organisation's emerging legal challenges and opportunities?

- 3% VERY DIFFICULT
- 14% DIFFICULT
- 51% OK
- 26% EASY
- 6% VERY EASY



What information sources do you use to identify emerging legal challenges and opportunities relevant to your organisation?

- 22% INTERNAL CLIENTS
- 26% LAW FIRMS
- 13% OTHER EXTERNAL ADVISORS
- 3% KEY SUPPLIERS / B2B PARTNERS
- 6% CUSTOMERS
- 22% REGULATORS
- 21% INDUSTRY FORUMS
- 23% IN-HOUSE LEGAL FORUMS
- 8% OTHER



How easily can you respond to emerging legal challenges and opportunities?

- 3% VERY DIFFICULT
- 18% DIFFICULT
- 58% OK
- 21% EASY
- 0% VERY EASY

Solutions:

The group discussed ways to anticipate the legal implications.

Solutions included:

- legal teams being more involved in strategic discussions on forward planning
- legal teams proactively engaging with key clients to better understand their most pressing needs, tailoring services accordingly
- balancing 'realistic' risk – instead of getting stuck on 'hypothetical' risk
- helping clients to understand the right questions

The group agreed that it was important for Legal to align its strategic and team objectives with organisational objectives.

This drives engagement within the team and creates a work environment where all lawyers see how their role helps the organisation succeed.


Front Foot Academy has created a legal strategy cheat sheet as part of its module on [Legal Strategic Planning](#) and a [Legal Risk Register template](#) to score probability and impact. You are welcome to use these resources.

Front-Foot Academy
MODULE 7 CHEAT SHEET

Legal Strategic Planning

BENEFITS

How does it help Legal teams & clients?




<ul style="list-style-type: none"> - Help achieve key organisational goals - Reduce adverse impacts: <ul style="list-style-type: none"> > Compliance issues > Unclear roles & responsibilities > Inadequate support > Misallocated time 	<ul style="list-style-type: none"> - Manage Legal's budget - Improve client relationships - Demonstrate value added by Legal - Improve engagement & alignment in Legal
--	--

GUIDANCE


How do you do it?

Assess current state



- Do you currently have an effective Legal strategic plan?
- Questions to ask:
 - > How well aligned is it to organisational goals?
 - > Progress reports?
 - > When did you last look at the plan/reports?
 - > How much is it helping prioritise important work?


Look at available data



Look at available data, such as:


<ul style="list-style-type: none"> - Legal issues register - Management/board reports & progress reports - Existing KPIs & progress reports - Client feedback 	<ul style="list-style-type: none"> - Customer issues - Legal team meeting notes - 1-on-1 meeting notes - Legal spend - Compliance reports
---	--

Questions to ask




- What are the most significant challenges facing Legal & the organisation?
- Which clients need the most Legal support?
- Which clients are engaging least with Legal (& why)?
- What are the biggest legal & compliance challenges?
- What opportunities exist to help achieve organisational goals?
- What are the main causes of disputes?
- How much is there alignment within Legal?
- Are there important changes in the external environment?
- What does the overall picture look like?

Collecting information from clients




- Top Legal support requirements?
- How well are those needs currently being met?
- What's working best?
- What are the biggest challenges relevant to Legal?
- What are the main things they'd like to change?

Defining Legal's role



- Address the key challenges & opportunities identified
- Reclaim time being wasted on non-legal/admin work
- Clarify roles of Legal vs clients
- Agreed by Legal & executive of the organisation
- Documented

Comms about roles

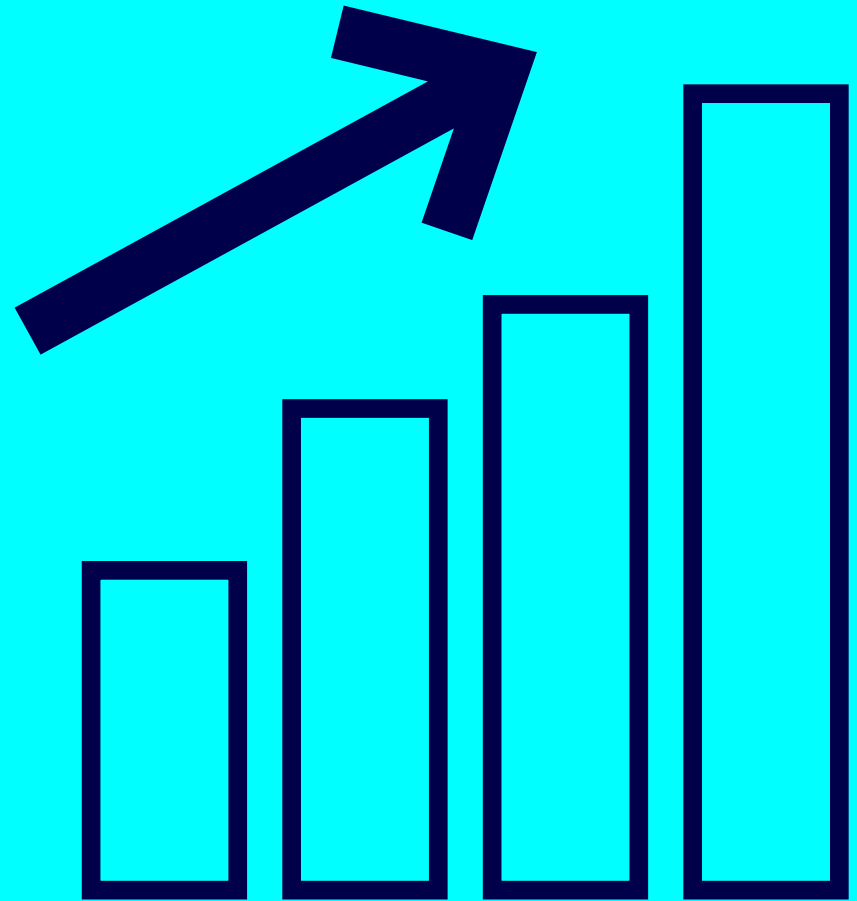


- Make them clear, succinct & accessible
- Use the main messaging channels your organisation uses
- Key messages to address:
 - > Who we are in Legal
 - > What we do
 - > How to work with us

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TOPIC 3:

Legal team resourcing



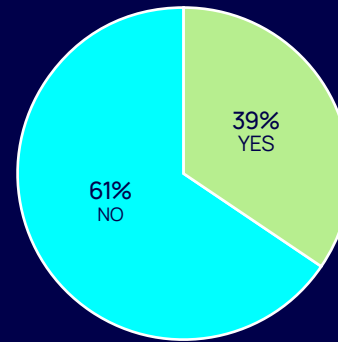
How can you best forecast and manage legal team resourcing requirements?

There was consensus around the table that resourcing is a big issue, impacting everything from compliance to staff conflict and turnover. A lack of clarity around Legal's role makes forecasting and managing team resourcing difficult. When key responsibilities are unclear, the team loses time on non-core work. Most legal teams (61%) do not forecast resourcing requirements. Of the 39% of teams that did attempt to forecast, more than 50% based predictions on a 'gut feel'. Only 32% used a legal strategic plan or client discussions – two critical inputs to planning and resourcing.

Legal teams are often drawn into multiple projects, adding to the workload and making predicting turnaround times difficult. Many attendees also felt they were over-servicing certain clients at the expense of others.

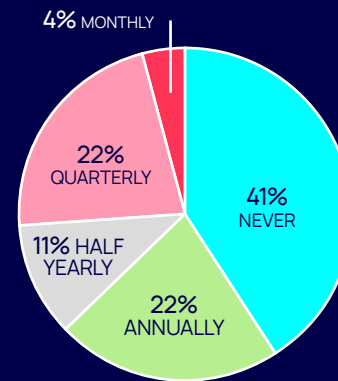
David posed questions to the group, including:

1. Do you forecast legal team resourcing requirements?
2. How often do you update your legal team's resourcing requirements forecast?
3. What information sources do you use to forecast legal team resourcing requirements?
4. How hard do you find it to forecast legal team resourcing requirements?
5. How hard do you find it to manage legal team resourcing requirements?



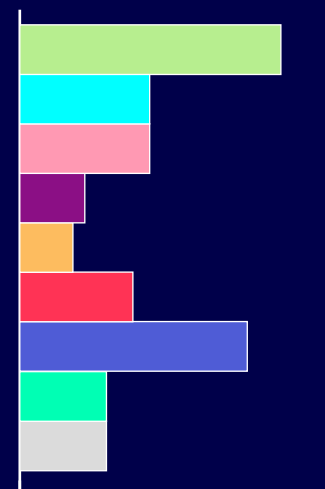
Do you forecast legal team resourcing requirements?

61% NO
39% YES



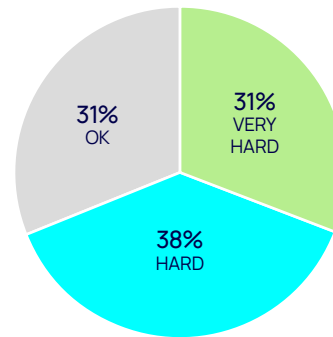
How often do you update your legal team's resourcing requirements forecast?

41% NEVER
22% ANNUALLY
11% HALF YEARLY
22% QUARTERLY
4% MONTHLY



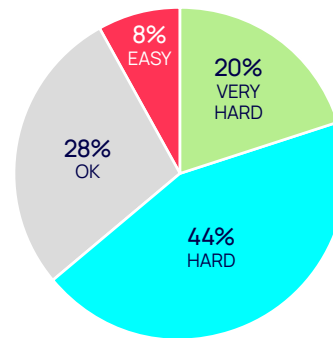
What information sources do you use to forecast legal team resourcing requirements?

64% ORGANISATIONAL STRATEGIC PLAN
32% LEGAL STRATEGIC PLAN
32% FEEDBACK FROM INTERNAL CLIENTS
16% REPORTS ON LEGAL TEAM PERFORMANCE
12% EXTERNAL LEGAL EXPENSES REPORTS
28% LIST OF MATTERS IN LEGAL TEAM
56% GUT FEEL
20% OTHER
20% NONE



How hard do you find it to FORECAST legal team resourcing requirements?

- 31% VERY HARD
- 38% HARD
- 31% OK
- 0% EASY
- 0% VERY EASY



How hard do you find it to MANAGE legal team resourcing requirements?

- 20% VERY HARD
- 44% HARD
- 28% OK
- 8% EASY
- 0% VERY EASY

Solutions:

Solutions to resource management are outlined below:

1. Assess risks and opportunities

Attendees agreed that teams should focus on addressing significant risks and opportunities relevant to Legal, then resource their work accordingly. David recommended using a [Legal Risk Register](#) to identify and prioritise risks. This allows the team to capture and size emerging issues and make informed decisions on resources required.


2. Define Legal's role

A [Legal Does v Does Not](#) template allows the client and legal team to understand legal's core role and what tasks fall outside their remit. The template can then drive constructive conversations on ways to deal with work that is not Legal's responsibility such as training or automated solutions.

3. Portfolio project management

Many organisations struggle to differentiate, and therefore resource, project work vs BAU. Additional projects also add to Legal's workload. A [Portfolio Management Framework](#) helps teams to manage, resource and execute projects. It also helps make a business case for additional resources when needed.


The Front Foot Academy's [Legal Project Management](#) cheat sheet can also help manage complex work, increase efficiencies, and ensure stakeholder alignment.

Front-Foot Academy  **MODULE 8 CHEAT SHEET**

Legal Project Management

BENEFITS

How does it help Legal teams & clients?





- Manage complex work
- Achieve targeted goals
- Improve financial management
- Increase efficiency
 - > ↓ Costs/time
 - > ↑ Quality/compliance
- Optimise resourcing
- Manage changes in scope & time
- Help reporting & governance
- Ensure alignment with key stakeholders (Legal/clients/externals)
- Enable continuous improvement





GUIDANCE

How do you do it?

1. INITIATION PHASE

<p>Questions to ask</p>  <ul style="list-style-type: none">- What's the specific problem or opportunity?- Who's involved?- What are the main impacts?- How material are those impacts?- What are the desired outcomes?- Has anyone done any work on this? If so, what happened?- How much support exists to pursue this?- What's the target timeframe?- What resources will we need?- Can we get those resources?	<p>Project charter</p>  <ul style="list-style-type: none">- Collect enough information to assess the project's potential & priority- Key elements to document:<ul style="list-style-type: none">> Description> Key goals> Timeframe> Owner> Project stakeholders> Any external inputs needed> Budgeted? (if not, what needs to happen to get funds?)> Risks> Dependencies> Exclusions
--	---

2. PLANNING PHASE

<p>Scope</p>  <ul style="list-style-type: none">- Define project goals & deliverables- Describe how success will be measured- Identify assumptions, constraints &/or dependencies	<p>Project plan</p>  <ul style="list-style-type: none">- Identifies key tasks- Allocates responsibility- Schedules timing/dependencies- Update for any changes e.g. scope, time, budget & task completion (etc)
<p>Budget</p>  <ul style="list-style-type: none">- What's the likely cost?- How certain is that?- What are the main variables that could impact that amount?- Is it budgeted?<ul style="list-style-type: none">> If not, what needs to happen to get budget?- Who's paying?- Are there any mandatory procurement obligations?- Timeframe<ul style="list-style-type: none">> Target start/close dates?> Phases?> Milestones?	<p>Project team</p>  <ul style="list-style-type: none">- Must have:<ul style="list-style-type: none">> Project sponsor> Project manager> Legal team lead> Client team lead/s> Required subject matter experts- May have:<ul style="list-style-type: none">> Steering Committee> Change manager> Externals e.g.<ul style="list-style-type: none">▪ Consultants▪ Technology supplier▪ Etc

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Solutions:


4. Interim lawyers

A team member's resignation, a complex project, or extended leave all impact workload and morale. Interim lawyers can fill skill gaps and facilitate task sharing. Interim lawyers can be quickly onboarded to provide support at a fraction of the cost charged by firm lawyers.

Front Foot provides [interim lawyers](#) for short-term and long-term roles. While increasing the resource budget is a major challenge for most organisations, this [Business Case](#) template helps communicate benefits to decision-makers.

5. Process improvement


Streamlining processes can reduce the workload for both clients and legal team members while delivering a reduction in time and costs. Improved workflow can also incorporate automated tasks, where possible, further amplifying these benefits. The Front Foot Academy's [Legal Process Improvement](#) cheat sheet provides some useful tips.

Front-Foot Academy  **MODULE 2 CHEAT SHEET**

Legal Process Improvement

BENEFITS

How does it help Legal teams & clients?




- Manage improvements alongside BAU work
- Clarify Legal vs client roles & responsibilities
- Reduce conflict
- Quantify wins
- Monitor & manage legal service delivery
- Provide guidance & tools to help clients
- Build IP & internal capability
- Improve planning & resourcing
- Improve alignment & wellbeing

GUIDANCE

How do you do it?


Assess priorities



Information sources include:


- Legal/client feedback
- Data reports
- Customer/B2B issues
- Audit reports
- Post implementation reviews

Triage & prioritise




- Frequency of occurrence
- Who's impacted
- Impact type
- Impact size
- Consensus to address
- Required/available resources

Define the problem




- Specify the issues arising
- Quantify their impacts
- Form a project team
- Planning includes change management

Map current process




- Is it mapped already?
- If yes, does it need updating?
- Take a pragmatic approach
- As is, not 'to be'
- Ask what **really** happens

Analyse causes




- Root cause analysis
- Assess current performance vs needs in areas like:
 - > Cost > Compliance
 - > Time > Effort
 - > Quality > Resources

Improve the process




- Prioritise solutions that can be achieved quickly
- It doesn't need to be perfect
- Can iterate incremental changes
- Map the new process
- Estimate improvements

Identify controls




- Process materials
- Training
- Support
- System changes
- Monitoring & management

Implement




- Change management is critical
- Provide a long lead time
- Explain to those impacted *'What's in it for them?'*
- Clearly explain benefits gained

Monitor & manage



- Monitor how well the new process is actually working:
 - > Manual
 - > Automated
- Feedback/questions
- Post implementation review

Continuous improvement



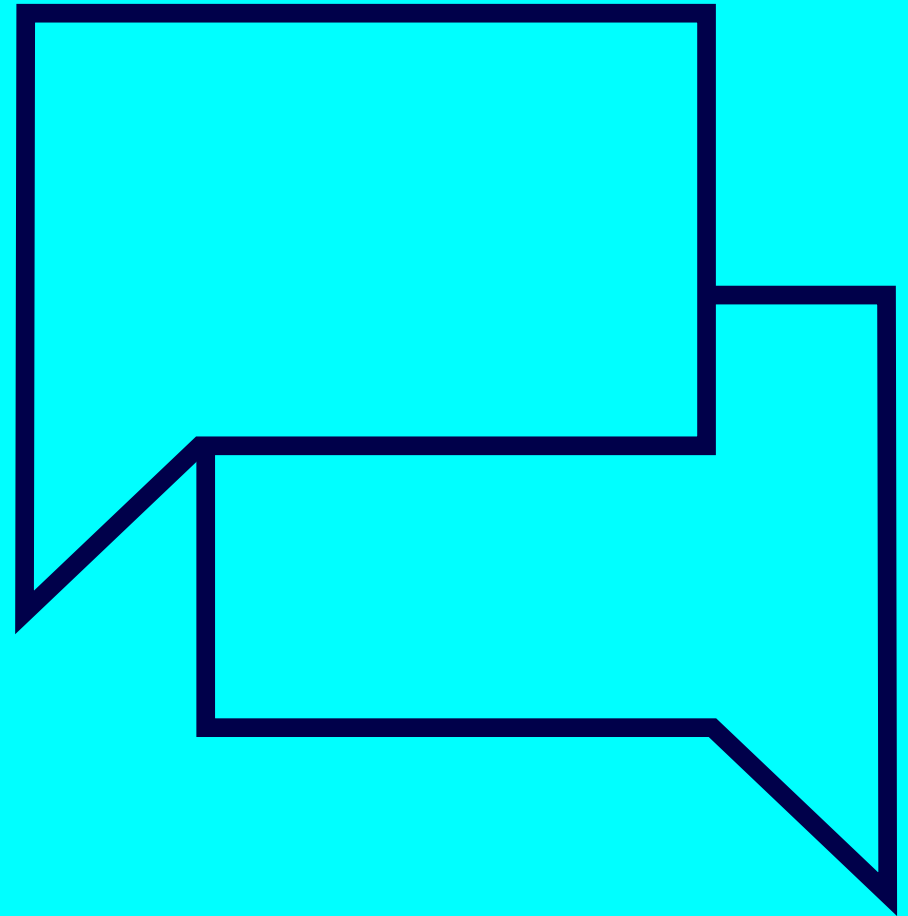
An ongoing cycle:

- Implement improvements
- Monitor & measure
- Triage & prioritise new improvement opportunities
- Analyse causes
- Implement & repeat...

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TOPIC 4:

Bridging the gap
between Legal
and everyone else



How can you build strong relationships and open communication channels with colleagues across the business?

The roundtable group discussed the misconceptions and communication barriers that can obscure the value that legal brings to a business.

David posed questions to the group, including:

1. Broadly, how well aligned is your legal team with colleagues in the rest of the organisation?
2. Do you proactively seek client feedback about your legal team's performance?
3. How often do you receive feedback from clients about your legal team's performance?
4. Do you have a document that describes the role Legal plays in your organisation?



Solutions:

Regular, proactive discussions between the legal team and key clients provide a great forum in a low-pressure environment. These chats provide everyone with an opportunity to discuss challenges, opportunities and potential solutions. Use an agenda such as the one provided in our [Meeting Agenda Template](#) to get the most of out these discussions and build stronger relationships.

Sharing valuable knowledge is another great way to strengthen Legal-client relationships and navigate issues together. This [Knowledge Management Health Check](#) can help.

In summary, the roundtable provided a rare opportunity for senior legal professionals to share challenges and workshop solutions around providing and demonstrating value. Legal minds are generally problem-solving minds. Solving every commercial issue is impossible, but with better communication, technology, and resourcing, the workday can be more positive and productive for everyone.





Front—Foot

We make in-house better.
We provide interim lawyers, training
and advice to help you succeed
and be happier in your work.

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Empowering your legal
team to achieve more

Front Foot is law firm specialising in in-house legal matters with a vision to help people work smarter and be more effective. To learn more about how we help high-performing legal teams, contact Front Foot Founder David Curtain.

Mobile +61 401 711 762
david@frontfootlaw.com

Interim Lawyers

We fill the gaps
in your legal team

Contact Jahna McKeg
Mobile +61 412 340 818
jahna@frontfootlaw.com

We provide highly experienced lawyers to help teams struggling with insufficient internal lawyers, skill gaps, budget constraints and tight deadlines.

Contact Jahna to find a specialist lawyer to match your needs.

Our interim lawyers can join your team quickly to:

- enhance your team's performance
- help your team get through heavy workloads
- avoid burnout
- inject fresh ideas and skills into your workplace

Legal Operations Training

We teach you how
to work smarter

Preview the free course
at frontfootacademy.com
or contact David Curtain
Mobile +61 401 711 762
david@frontfootlaw.com

Front Foot Academy is a legal operations course that mixes on-demand training, live Q&A sessions and coaching.

Over 10 courses, our practical course helps you to:

- increase your in-house legal team's overall impact
- demonstrate the value Legal adds to the organisation
- identify ways to save time and money
- leverage technology & avoid pitfalls

Legal Operations Consulting

We identify & implement
team improvements

Contact David Curtain
Mobile +61 401 711 762
david@frontfootlaw.com

Over 19 years working with in-house legal teams, David Curtain has developed practical frameworks to improve in-house operations using achievable measures.

David now consults with a select group of clients, supporting them to:

- overcome obstacles limiting legal team operations
- improve flawed legal and compliance processes
- use technology to achieve goals
- improve alignment between legal and clients
- create engaged and energised teams