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Deloitte Legal Department Health Review

Approach to Strategic Planning

CLOC 2018

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Before you get started, gather information on:		
Market	Broader Business	Legal Function
<ul style="list-style-type: none"> Major trends impacting your organization such as economic conditions, regulatory/legislative change, technology, competitors 	<ul style="list-style-type: none"> Organizational strategy Goals of stakeholders Major business events such as transactions, transformation projects (operating model changes in other functions, cost reduction, automation), leadership changes 	<ul style="list-style-type: none"> Key metrics Budget Challenges Opportunities

Aspiration – What will your legal function look like in 3 years?

What key areas will you focus on to achieve your aspiration? (Measurable goals in each area)

Delivery (Sourcing, Technology, Innovation)	Talent (Recruiting, Development, Staffing)	Relationships (Communications, Engagement)

What will be completed by the end of year 3?

What will you need to start by the end of year 1?

Make a Plan

Year 1 Activity	Owner	Key Milestones	Timing	Dependencies

Other Considerations

How will you manage the key activities? What governance will be in place?

What capabilities are needed to carry out critical activities?

What investments are needed?

What could hinder completion of the critical tasks?

How do you mitigate these against these risks?

What support is needed? From whom?

How will you communicate to your stakeholders?

Areas to Consider

Contracts & Transactions

Contract Review

Contract Due Diligence

M&A/Joint Venture

Negotiation Support

Contract Management

Contract Drafting

Litigation

Matter Specific
Legal Counsel (e.g., Civil, IP)

Discovery Services

E-Discovery Compliance

Legal Opinions

Drafting Pleadings & Briefs

Database Creation & Maintenance

Corporate Governance

Annual Meeting

Subsidiary Management

Global Policy

Corporate SEC Matters

Corporate Policy & Procedure

Board Reporting

Regulatory & Compliance

Government Affairs

Regulatory Support

Environment Health & Safety

Material Regulatory Matters

Regulatory Inquiries

Regulatory Reporting

Intellectual Property

Patent/Copyright Research

Patent Drafting & Review

IP Portfolio Management

Infringement Analysis

Patent Proofing & Docketing

Cease & Desist Notices

Support Services

Statutory/Case
Law Research

General Business Support

Document Management

Legal Billing Services

Paralegal & Secretarial
Services

Immigration Support

