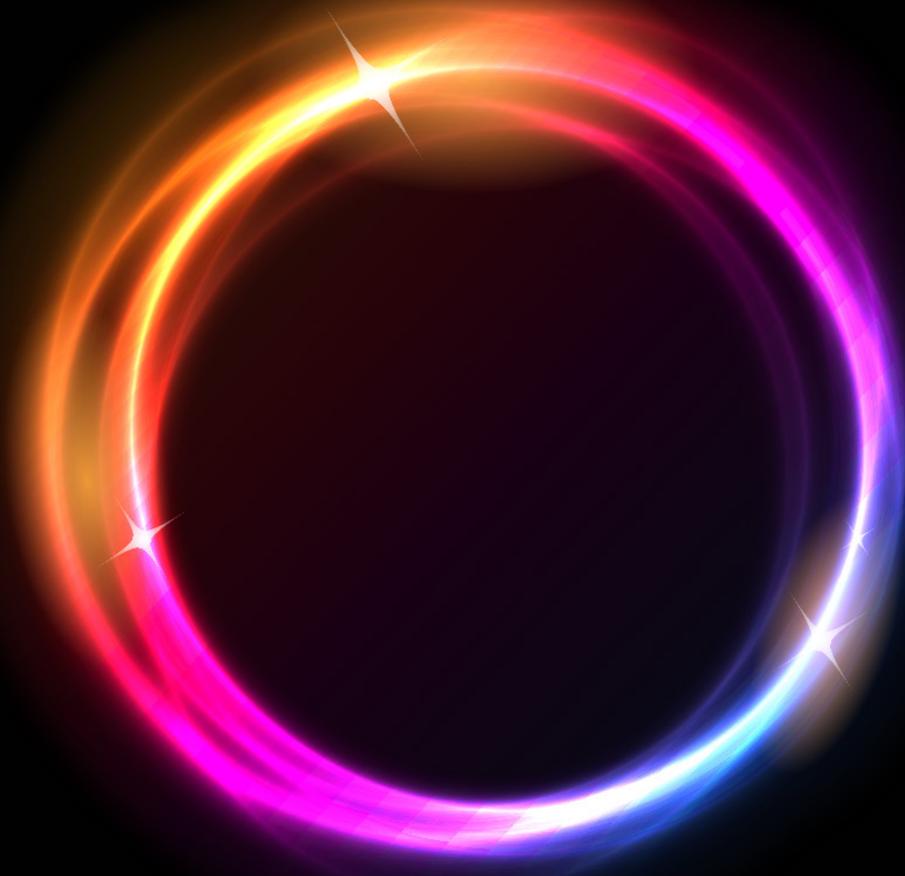


Deloitte.



The four faces
of the legal
operations executive

Today's legal operations executive is multidimensional, bridging the world of operational efficiency and legal services delivery. Focused on strategy, process, budget, talent, and technology, the legal operations executive is increasingly operating at the highest and most impactful level of the legal function. In fact, 68% of surveyed legal operations executives report directly to the general counsel or chief legal officer (CLO).ⁱ

With the expansion of the role and responsibilities and the growth of the operations team,ⁱⁱ legal operations executives may be challenged to remain focused on the most strategic initiatives. As legal operations professionals continue to chart the path forward for this critical role, it may be helpful to consider the allocation of time between four critical "faces": **Strategist, Catalyst, Steward, and Operator.**

Four faces of the legal operations executive



Catalyst

Innovator | Change Agent | Disruptor

Facilitate innovation and drive continuous improvement across the legal department, shifting the department culture, promoting agility and embedding new and emerging capabilities



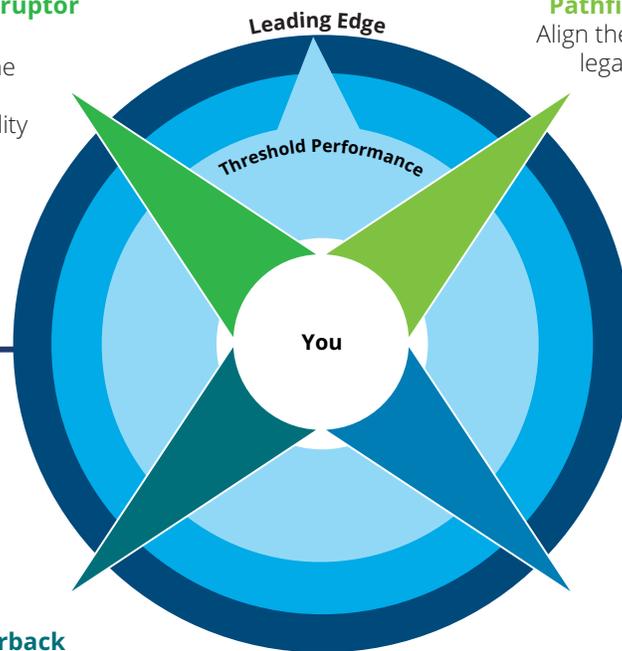
Strategist

Pathfinder | Visionary | Collaborator

Align the legal operations strategy with the legal and business strategies, promote transformation and collaboration

Change the department

Manage the department



Steward

Champion | Guardian | Quarterback

Protect and enhance the brand and reputation of the legal function, develop a sustainable cost management program and lead successful delivery of projects and initiatives



Operator

Leader | Enabler | Coordinator

Execute the legal operations strategy, optimize talent and drive technology and process implementation, improving efficiency and effectiveness

The faces



Strategist

The Strategist is responsible for defining the legal operations vision and clearly articulating the desired goals and outcomes. The Strategist is a relationship-builder, a proactive thinker, and always working toward alignment with both legal department and business objectives.

Some responsibilities that may be associated with the Strategist role include:

- Align legal operations' priorities and resources with legal and corporate strategies to optimize costs and create additional value for the business
- Anticipate and proactively develop a strategy to address operational, technological, and talent leading practices
- Design the appropriate department operating and service delivery model
- Articulate of the value proposition of legal operations
- Develop a capital investment strategy and budget that includes technology investment and a plan for external spend and fee negotiation
- Build strong relationships with internal and external stakeholders and other legal operations professionals and industry groups

"The legal operations leader must have a clear strategy with the implicit understanding that legal isn't a business of scale, but rather one of precision and value."

—Leonardo (Leo) Murgel, vice president,
Legal and Corporate Affairs chief operating officer,
Salesforce



Catalyst

The Catalyst drives for change with purpose and intentionality. For a legal operations executive, this role includes an emphasis on cultural change and the ability to lead others into new territory with a sense of enthusiasm and optimism. The Catalyst is a sensible disrupter, both self-aware and possessing a high degree of emotional intelligence.

Some responsibilities that may be associated with the Catalyst role include:

- Promote and cultivate a culture of innovation and lead change management efforts in the legal function
- Drive continuous improvement through process simplification and standardization
- Be a thought leader on innovation, technology, and leading practices for legal operations
- Drive engagement by providing tech enablement that allows legal department leaders to work more efficiently and deliver more forward-looking outcomes to their business clients
- Explore prototyping to develop and grow new ideas, either internally or through ecosystem partners
- Demonstrate commitment to work/life balance, diversity, equality, and inclusion as a role model for the legal operations team and the legal department

The Legal Operations executive can play an important role in cultural change. I watched my legal operations colleague implement and grow the legal department's pro bono and social responsibility efforts. Her work has not only changed the culture of the department, but it has also made a real difference to the individuals who work in legal and provided a model for the enterprise in its interest in and ability to respond to the changing times."

—Tom Dailey,
senior vice president and
general counsel - International (retired),
Verizon



Steward

The Steward establishes trust through delivery excellence, working to protect the assets of the legal department, including both reputation and budget. A savvy Steward leverages business intelligence to enable a deep understanding of how the legal function delivers value and works to support and enhance that value creation through adept project management and an eye toward cost management.

Some responsibilities that may be associated with the Steward role include:

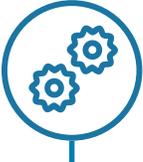
- Oversee legal project management to execute tasks on time, within budget, and with quality
- Develop suite of standard program and project management approaches, playbooks, and tools for rapid delivery of projects through large-scale programs
- Work with procurement to identify spending trends, potential cost savings, and efficiency opportunities
- Partner with finance to understand the value of legal spend and develop accurate forecasting and reporting
- Embed a data-driven mindset into the legal department; develop, monitor, and leverage KPIs to track success, demonstrate value, and enable the executive team's informed decision-making
- Develop and implement an ongoing vendor management program, including a preferred provider list of outside counsel and relationships with legal technology service providers and alternative legal service providers, as well as a plan to serve as a liaison between all the providers to drive the most value

“One of the most critical priorities for the legal operations professional is to guide the decisions related to buy versus make. More specifically, the legal operations executive should be leading the way as we determine what work should be done internally and what should be done by our external providers—all while keeping tight control over the budget.”

–Lee Reichert,
chief legal and government affairs officer,
Molson Coors Beverage Company

A case study: “If it’s something that doesn’t require a law degree, it’s better done in the business.” –Andrew Sherman, general counsel and corporate secretary at Bank Leumi USA

“At Leumi Bank, the legal function is small and, to help enable efficiency, it has looked for opportunities to cross-source work. Cross-sourcing efforts identify work currently being done within the legal department that can be moved out of legal and back into the business. For the bank, nondisclosure agreements (NDAs) were a ripe candidate for cross-sourcing because there was a high volume of requests and the work itself is a less complicated transaction. Now, armed with templates and a playbook, the business is empowered to handle NDAs on its own, although legal still provides support when the business raises exception issues. The cross-sourcing effort is reinforced by a system of compliance scores that are included in the performance review process. After the first year of the cross-sourcing effort, there’s no longer an NDA bottleneck within legal.”



Operator

The Operator is action-oriented, focused on enabling legal operations and legal department talent. The Operator is also skilled in understanding how technology can better enable the legal function, leveraging technology to drive toward a more efficient and effective legal function.

Some responsibilities that may be associated with the Operator role include:

- Seek out the voice of the customer to assess the operational efficiency of the department
- Evaluate the technologies that support the legal function; identify and implement technology solutions for the legal department
- Identify whether technologies supporting legal are compatible and fully integrated with enterprise technologies, including ERP, CRM, and third-party risk management
- Provide training for technology and process innovation
- Establish common understanding of expectations, roles, and responsibilities among the legal operations team and identify gaps
- Refine the legal talent strategy; work with legal HR partner to develop a talent strategy for legal that meets the future needs of the organization

“Talent development can’t be left solely to HR. We need to recruit and develop the right talent. If key people leave, you have a succession plan in place. This pipeline is so important—it builds resilience in the team.”

–Kevin van Tonder, founder,
Yewna Law and previously general counsel
for Schlumberger Legal Shared Services

Although it may be helpful to think of the legal operations executive’s priorities in neat categories, priorities often have components that span more than one face. For example, the priority “anticipate and proactively develop a strategy to address operational, technological, and talent leading practices” likely involves elements of the Strategist role, understanding (and potentially influencing) the legal department strategy. It also may touch on the Operator role, implementing and enabling technology and training for the legal team to help them move into alignment, as well as hiring and onboarding new talent.

In the same way, the priority of “embed a data-driven mindset into the legal department; develop, monitor, and leverage KPIs to track success, demonstrate value, and enable the executive team’s informed decision-making” may appear to be a straightforward Steward priority. However, if the legal department has never used a KPI model and a technology implementation is necessary to achieve the goal, this priority may also touch the Strategist and Operator faces, too.

The four faces exist simultaneously, and the legal operations executive’s ability to navigate each is interconnected.



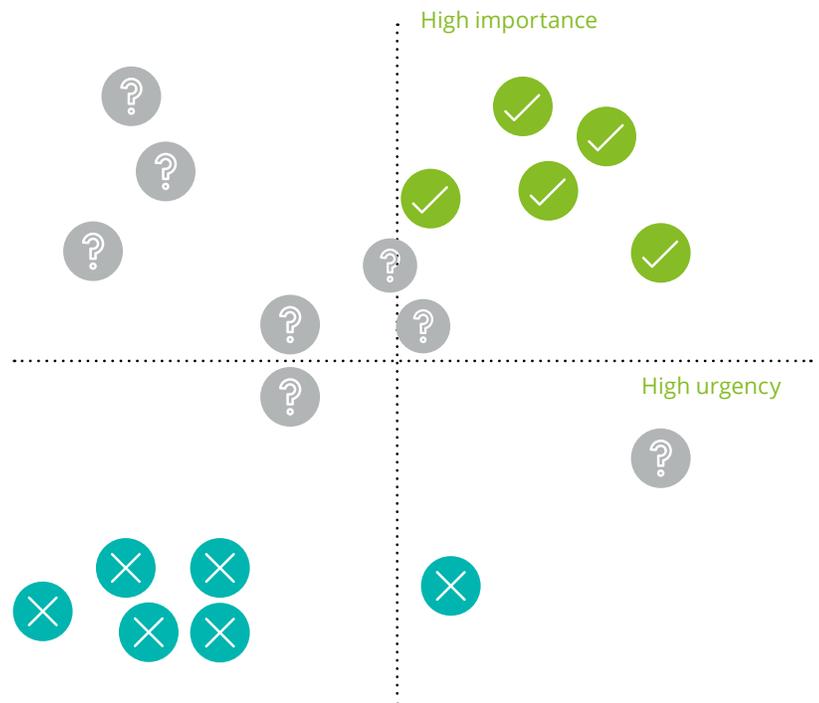
Your critical resources

Deloitte’s researchⁱⁱⁱ indicates that three resources underpin an executive’s success navigating the four faces: time, talent, and relationships.



- **TIME:** Time is generally not a commodity that exists in abundance for legal operations professionals. In fact, Stevan Verkin, director, Legal Operations Americas, Technip FMC, says “adaptability and utility are the hallmarks of a successful legal operations executive—the ability to go in and out of different issues all the time is a baseline requirement of the job.” When being pulled in so many directions, it can be easy to get off track or neglect longer-term priorities. But, determining your priorities in advance and allocating time accordingly can enable successful execution of those goals and set you apart as a leader. Being clear on your strategy, goals, and priorities enables you to more effectively communicate your value, the value of the legal department, and legal operations function to others. This requires “time accountability,” says Tom Dailey. “As you grow in your career and in the level of responsibility, it becomes increasingly important to be intentional about how you spend your time and allocate time to each of the four faces as required by the demands of the role.”

Figure 1. What is urgent? What is important?



- **TALENT:** Whether you are a small or solo operations team or a large team, assessing and properly leveraging talent is a critical factor for success in the legal operations role. For legal operations functions that have the ability to hire and grow their departments, it may be important to consider a wide variety of skills sets. For Leo Murgel, focusing on “scrappy” individuals that are mature enough in their skill sets to anchor their roles, but flexible enough to be successful in a startup environment is key: “My legal operations function serves a legal group of more than 500 people. My team has 20 people. I have very few attorneys; instead, my strategy is to hire people that have focused on the skills I need throughout their entire careers, which includes financial analysts, paralegals, business systems analysts, eDiscovery folks, and project managers.” For smaller legal operations functions, leveraging talent is still important, but these leaders may need to be more creative. For example, Kevin van Tonder, founder, Yewna Law and previously general counsel for Schlumberger Legal Shared Services, leveraged talent from the IT department creating a role that sat in IT, but had a dotted-line reporting structure into legal: “This structure allowed us to build a better business case for technology spend in legal and provided stronger support for IT issues specific to the legal function.”

Figure 2.





• **RELATIONSHIPS:** Exceptional relationship-building skills—the ability to aptly navigate relationships, build rapport, work effectively with a diverse group of others, and cultivate a strong team culture—can be fundamental to the success of any initiative. A legal operations executive will need to work through their relationships to help others understand the value of the legal operations strategy. van Tonder's advice: "You must build up your network, develop rapport, and be able to have the difficult conversations. Sometimes what I was thinking didn't align with what my stakeholders envisioned—having gravitas and credibility from the time invested in developing strong relationships allowed me to drive my initiatives forward." Similarly, understanding the priorities of others is an important component of building strong relationships. For example, Deloitte research^{iv} indicates that most often, the top five priorities of CLOs are:

- Develop internal stakeholder relationships
- Manage legal talent
- Align legal priorities and resources with corporate strategy
- Manage risk and regulatory approach
- Optimize the legal operating model and structure

"Spend time listening and understanding first, not jumping in, and don't just have conversations with legal people—reach out to the business, too," suggests van Tonder. "What do they expect from legal, and what is important to them?"

Figure 3. Relationships are the core of success in this role



Final thoughts

The role of the legal operations executive continues to grow in importance, with an increasing range of responsibility within the legal function. To stay on track, it may be helpful to assess your allocation of time and regularly evaluate and select your top priorities. To be successful in the role, understand the four faces and where you need to focus your time and energy, execute on your top priorities, and hone your critical resources.

“You must be focused; if you try to do everything at once, you will fail.”

–Leo Murgel

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“You need to have someone who is passionate and excited about doing the job, and who brings new and creative ways of thinking to the table.”

–Lee Reichert

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End notes

- i. Corporate Legal Operations Consortium (CLOC), [2020 CLOC State of the Industry Report](#), August 2020, p. 12.
- ii. *Ibid.*, p.13.
- iii. Ajit Kambil, "[Navigating the four faces of a functional C-level executive](#)," Deloitte Insights, May 28, 2014.
- iv. Deloitte Development LLC, [Four Faces of the Chief Legal Officer](#), April 2019, p.4.

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