

# Heading a Legal Team 101:

Everything Newly Appointed  
Managers Need to Know

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# Intro



Starting a new position is always overwhelming. When traversing uncharted territories, you may not always know what to do next. It gets even more complicated if you are tasked to manage a department. The burden is on you to ensure the success of your team.

Heading a legal department is particularly challenging. You have to juggle many different roles and meet a variety of obligations. These days, heads of legal departments, chief legal officers (CLOs), and general counsels are not only expected to manage legal processes and the team, but they are also responsible for financial, strategic, and risk management operations—all while facilitating the company's growth.



Other than just offering your legal expertise, you are now also expected to act as a strategic business partner. To this end, you must promote greater collaboration with other corporate departments while improving your own operations.

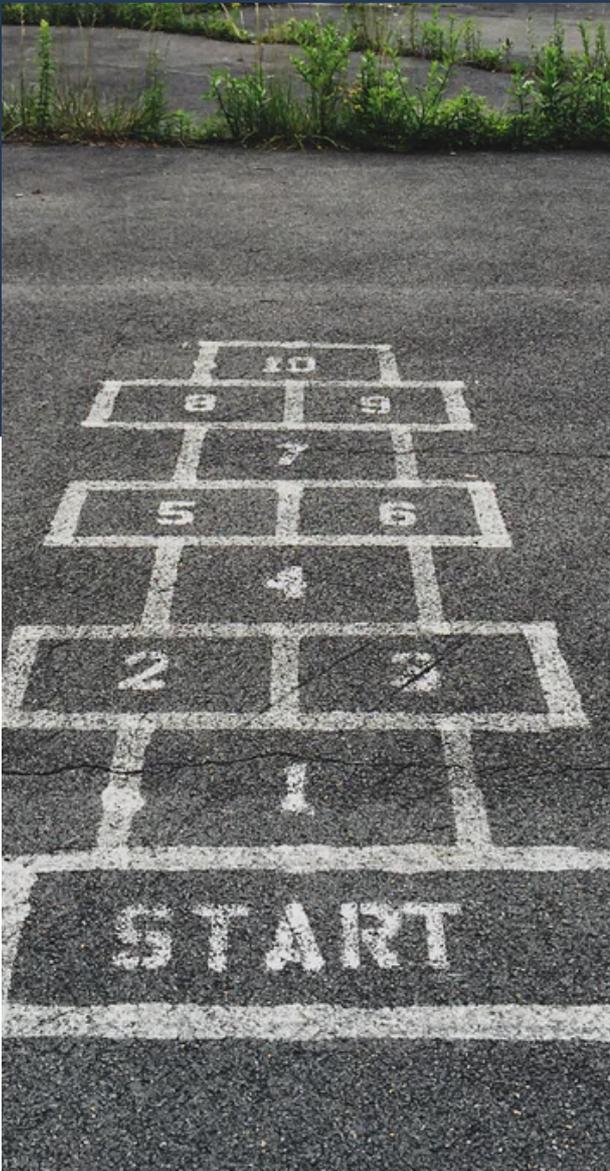
To deal with the pressure of your new role, you will have to lean into technology to automate and speed up some processes. Data analytics can also equip you to make better decisions. Allow us to offer some guidelines that can help you ease into your new role.

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*Today, having a law degree isn't enough to resolve all the challenges faced by legal departments.*

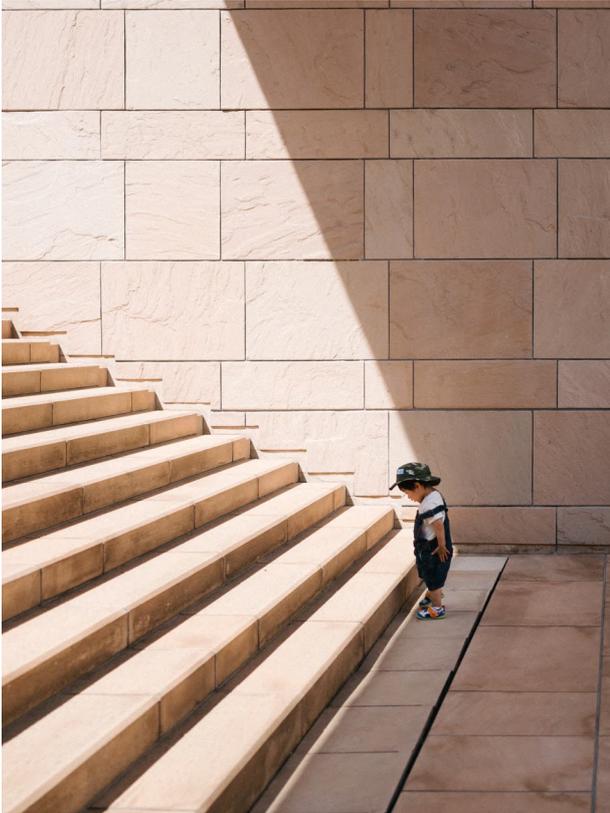
# Getting started:

what to keep in mind when entering a new position



So, you've just taken on a new job role. And it's not just any role. You've assumed a highly demanding position that revolves around legal processes and project management.

While the legal industry continues to be rooted in legacy and traditional methods, it's not immune to changes in the business and economic landscape. It is also falling under pressure to keep up with technological advancements. Already feeling lost? The following bits of wisdom can offer some clarity.



## Reality bites

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You're now responsible for steering the ship. This means you must have your workflow and procedures carefully planned out. The problem is that what you have on paper does not always translate to the same results in real life. You will encounter deviations that can make you lose control.

To maintain it, make sure to keep yourself informed about the actual state of affairs by talking to your colleagues. This way, you will be solving real problems instead of just following trends or generic advice. This will help you produce results that offer real value.

## Change is hard but necessary

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Once you've assumed the role, you'll soon find yourself bombarded with countless requests and issues that your colleagues expect you to resolve. You will also start recognizing areas of improvement. Expect to encounter resistance, but never hesitate to initiate changes.

Take a systematic approach. Start by gathering data, then look for patterns and insights. Use the results to create at least three frameworks that can lead to improved outcomes. Choose the improvement that offers the most value.

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A legal department doesn't exist in a vacuum—its work impacts the decisions made by the company's top management.

## Execution is everything

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To achieve your improvement goals, make sure you are correctly implementing your strategic framework. Allow technology to support you wherever possible. Automating workflows and processes will help you prevent deviations that create problems. Document management software, for one, can provide custom workflows, automate documents, and expedite routine work.

Explore the possibilities by speaking with an account manager from your software provider. Discuss your plans and ideas, and inquire about available solutions and the latest technological advances. Make sure you are just as aware of technical shortcomings and hidden costs. However, keep in mind that cheap does not always translate to saving. Never settle for mediocrity and go for the best quality-price ratio.



# The metrics every legal department should be measuring

To effectively lead a department, you must be able to track its performance. Setting metrics will help you establish a baseline and check whether you are making any improvements or if you need to steer the department in a different direction.



Legal budget makes the legal team more credible across the board and the company



## Economic value generated by your department

Even if your department is not generating any revenue, you can still measure its economic value. Start by measuring the savings you make for the company's corporate funds. You can put a number on the costs your company would have incurred if your department had not produced well-crafted corporate and tax structures.

## Current and anticipated expenses

Use project plans, planning tools, and budgeting techniques to keep track of your expenses. Make sure everything is accounted for. Your records will not only help you track performance but will also help you anticipate any expenses. You will be able to come up with the correct figures for your budget plan and ensure you'll never lack funds.

## Legal talent retention

Your department's retention rate reflects on your performance. You should be able to attract talented people and keep them. The retention rate will help you determine if you are putting enough effort into ensuring employees are satisfied and performing at their best.

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## The ratio of high-value vs. low-value work

Thanks to tools like document automation software, more and more tasks are getting automated. This allows specialists to focus on more demanding and exciting assignments.

Track your department's efficiency level by measuring the time employees spend on low-value work. The data will help you determine areas that could use more automation. It will help you make sure more time is being devoted to high-impact tasks.

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## Legal workload

Do other departments turn to your team for legal help? Make sure you keep track of how often they do this. If the frequency keeps spiking, you will have to check whether there's a serious issue at play. This way, you can proactively take measures to manage your department's workload more effectively. You may end up automating more tasks or bringing in fresh blood.

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# Creating and nurturing legal talent

Every leader has to bring out the best in the people they are managing. The following tools and strategies will help you get the job done.



## Prepare a skill matrix

Also known as a star chart or team competency matrix, a skill matrix is a spreadsheet that showcases your employees' competencies and skill levels without mentioning their positions or roles. It offers a picture of the "resources" your department possesses.

A skill matrix allows you to identify opportunities for professional development easily, manage roles and relocations, improve talent retention rate, and reduce the costs of hiring external counsel.

Basic versions of the matrix involve the use of symbols to represent qualification scales. To illustrate, you may use a checkmark (✓) to indicate that a person is skilled in specific areas and a dash (–) to show a lack of competency. You may also use numbers to rank skill levels.

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*Information about employees' professional goals and desires will help you manage the relocation of roles, when needed, and improve your talent retention rate.*

## Craft an employee story map

Just as a user story map allows UX designers and programmers to improve user experience by identifying potential usability issues, an **employee story map** lets you enhance the interactions between employees and your organization. It allows you to map out what makes your employees happy and what disappoints them.

You can build the story map by following these guidelines:

- 01** Determine employee types.
- 02** Specify all stages of the employee journey. It may look like this: Hiring > Adaptation > Meeting initial KPIs > Growth and Development > Dismissal.
- 03** Elaborate on each touchpoint. For example, you can detail the employee's main pain points or struggles while trying to meet the KPIs.
- 04** Finalize the story map.



## Minimize routine work

Employees who are drowning in routine tasks can't find time for work that offers more value and professional growth. Routine work can also result in boredom that eats away at their motivation level.

Automating legal processes can significantly reduce the number of routine tasks and enable employees to devote more time to value-added activities. Integrate mental health practices into your workflow to create a healthy, productive environment for your team.

# Legal project management: structuring your work to improve customer experience

Growing client expectations have forced legal professionals to adopt tools that help them provide services more efficiently. A recent development, legal project management (LPM), is pushing legal professionals out of their comfort zone, turning them into more proactive and cost-efficient players.



Mastering project management skills will allow you to employ new initiatives, embrace transparency, and complete complex tasks on time and on budget.



## Kanban boards

A project management tool widely used by technology and service teams, kanban boards can help legal departments handle mundane or routine tasks much more efficiently. The tool visually depicts various stages of a task or project. The cards represent work items, while the columns show each step of the process. For example, you can label columns as **"to-do," "in-progress,"** and **"completed."** Team members can quickly move cards from left to right to show their progress.



## Jobs-To-Be-Done

JTBD is a methodological framework that helps you better understand customer behavior. Focusing on motivation and context, it captures, defines, and organizes the **needs of the customers**.

To put things into perspective, the framework may show you that e-signature software can help your employees avoid spending hours of travel time to meet with a client just to sign a contract. It shows that you are not buying the software for the signature per se but paying for the **time and energy it saves** for your employees.

Although mainly hidden from clients, legal operations impact customer experience. In terms of the JTBD framework, the lawyers, C-level executives, and the company are the clients that the legal department serves. Legal operations must enable the legal department to run like a business.



## Building a legal knowledge culture

Because it's applied knowledge, legal expertise can only be retrieved through practice. This makes employees' wisdom the most valuable resource in any law organization.

Fortunately, technology ensures legal knowledge is no longer confined to the inner circle. The right document management solution will help you achieve the following goals.



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## Procedural clarity

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New employees need a clear understanding of the workflow structure and touchpoints in the document management flow. Work processes should also continue to function seamlessly, even in the absence of an employee. Good workflow automation software can make all these possible. The system should offer a straightforward contract pathway or workflow, covering various scenarios and roles.

## Communication breakdown

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Communication paves the way for collaboration and progress. Unfortunately, it often becomes unnecessarily distracting and overcomplicated.

Contract management software can help streamline document-related communication and solve the costly problems of discussing a contract. It can help you establish steady communication without having to knock on multiple doors.

## Project library

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Legal professionals who understand the clients' expectations are better equipped to build strong relationships and safeguard your company's reputation. Document management software can help keep the customer data updated, organized, and easily accessible.

## Enhanced search and metadata

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Quick access to information can help lawyers provide cost-effective services and meet tight deadlines. Search software can do wonders for improving the workflow of legal advice. Legal professionals will be spared the redundant work that comes with manual searches, such as recreating missing documents and scouring hundreds of records to retrieve relevant data.

Document management software can break down document components into searchable items, allowing employees to easily retrieve metadata from a constantly shifting mass of information.

## Document template databas

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Although being vital company assets, templates of legal documents are not always properly managed. Often, employees have to sort through outdated versions. Document management software can do the exacting task of organizing hundreds of templates, ensuring employees are working on the latest document version. This is vital when you keep cost-efficiency in mind.

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***Metadata structures any piece of information in a way that it can be searched for, analyzed, calculated, and automated.***

# Best practices for planning a legal budget

The shifting economic landscape poses new challenges to annual budgeting. You cannot rely on traditional planning processes anymore; you need to prepare for the unexpected changes wherever possible. The following practices will help you.



When thinking about budgeting, you should consider all kinds of implications stemming from different strategic objectives.



## Leverage the legal tech

Investing in legal tech can do wonders for your overall budget. Document management software, for one, can automate documents, optimize legal processes, and organize data. These benefits significantly **reduce time-wasting** and the need for physical copies of contracts, resulting in huge savings.



## Set success metrics

Track your day-to-day operations by setting financial KPIs like cash flow and revenue. These measurable KPIs will help with long-term strategies for cutting expenses and increasing revenue. They will also help you determine the **success of your legal processes**.



## Consider zero-based budgeting

Explore the merits of zero-based budgeting, which assumes that budgets for new periods are **generated from a "zero base."** This means you will have to account for all expenses, including old and recurring ones, before including them in the budget. This type of approach allows for focused operations, disciplined execution, reduced expenses, and flexible budgets.



## Keep your budget in line with the company's goals

Make sure your department is feeding into the company's bottom line. One way to do this is to avoid any mismatch between your budget and the overall business strategy. This way, you will effectively allocate spending and make worthwhile investments.



## Analyze budget from the past year

Studying historic spending will help you make better decisions. Take a look at the past year's annual budget. How much did your department spend the year before? How has the budget changed during the year in question? The historical patterns you glean from the data will help you predict future trends.



## Use stress testing to mitigate risks

Stress testing is a traditional tool commonly used in the financial industry. You run it by measuring the risks of investment, determining if assets are adequate, and evaluating internal processes and controls. This tool is so helpful that it is required to be used by American banks with \$50 billion and more in assets. Your department is sure to benefit from it, too.



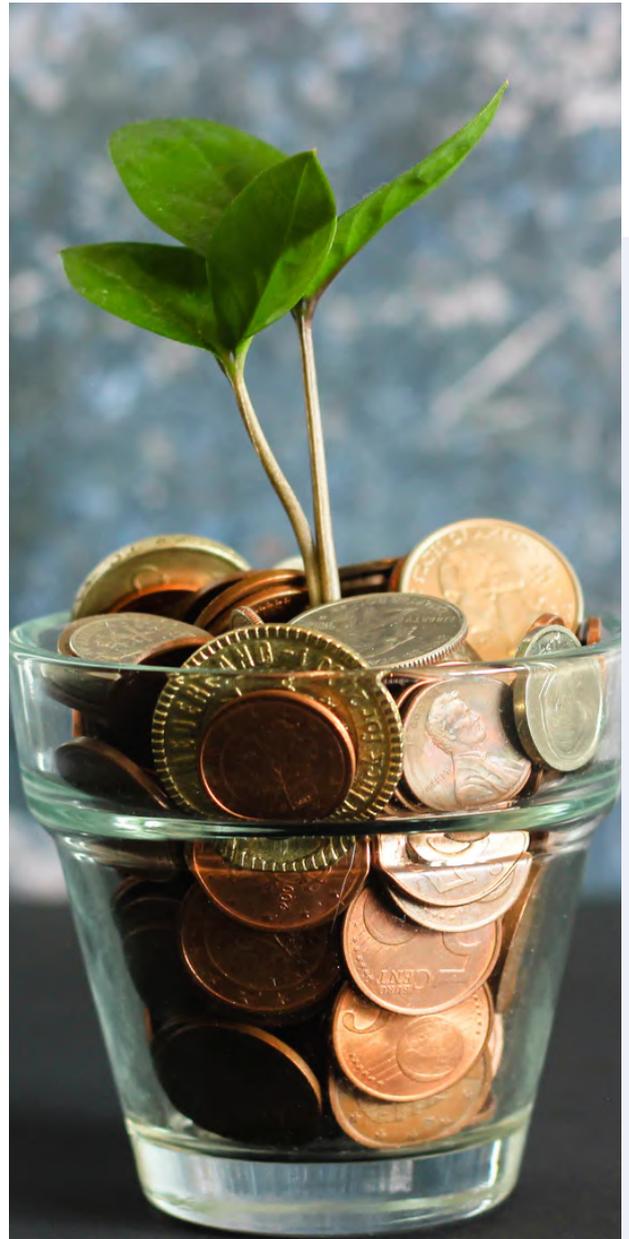
## Account for remote work scenario

Make sure you are taking recent changes into account. COVID-19-related lockdowns have made remote work necessary. New workflows created the need for recovery checklists to adapt to the new lifestyle. Work-from-home arrangements may be extended, so be ready to account for them in your budget.



## Be prepared to cut costs

Your board may ask you to cut down your budget, so get ready for that. Make sure you're prepared with provisions that will not affect essentials like salaries. You can start by accounting for the savings that may result from the work-from-home policies, such as reduced expenses on office supplies, utilities, events, and travels.





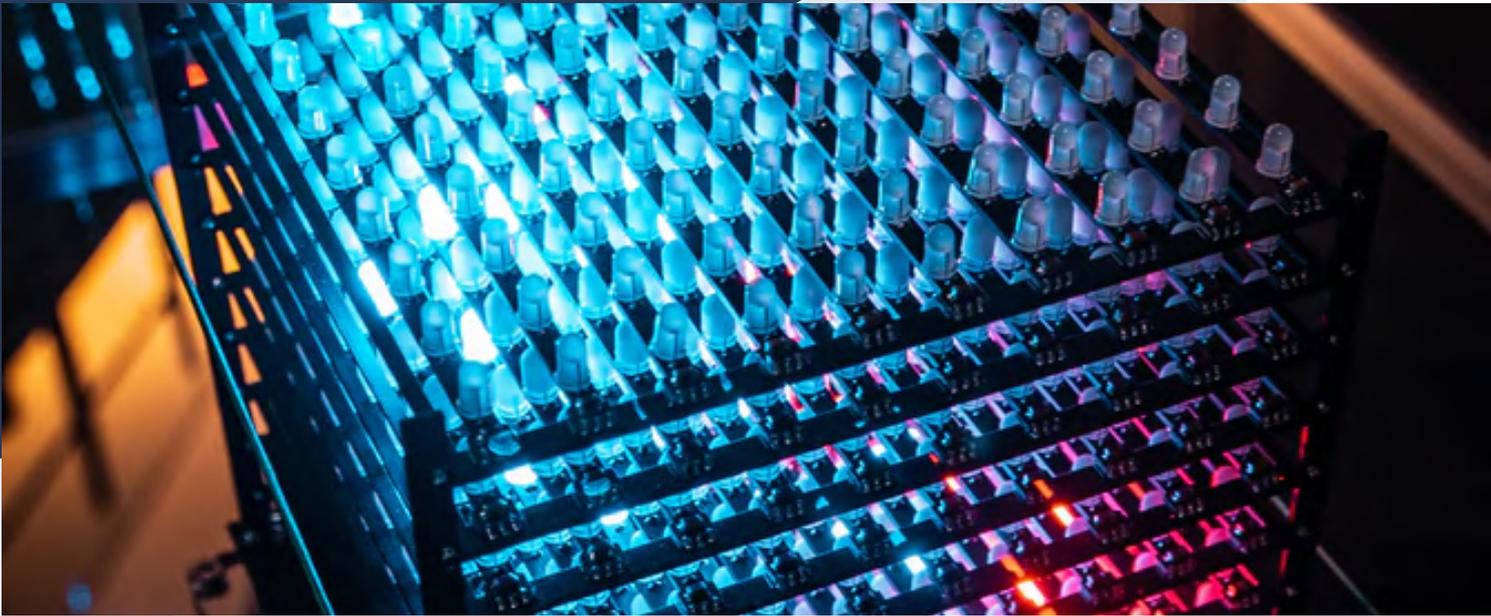
## The hidden cost of ignoring innovation

People almost always equate innovation with expansion. The reality is that failure to adopt new technology does not only keep you from achieving growth, but it also comes with hidden costs. Without the efficiency it affords, you could end up losing clients to competitors, which will cost you significant market share and profit.

Digital technology is becoming more and more integral to our daily lives. Before long, innovation could become a matter of survival for your organization. You will have to keep up with the innovation race, or the early adopters will keep taking your piece of the pie.



# Choosing the right technology for your team



Adopting new technology is a resource-intensive task. Its effects are enduring, so you can't afford costly mistakes. For starters, don't just snap up the first tech solution that appears inviting. What seems rational at first can cause frustrations and serious problems during implementation. Also, make sure you introduce a tech solution that your employees will actually use. You will have to be proactive and help them ease into it.

# Preparing for the new tech adoption

You can't just introduce new technology to your organization and expect everyone to start using it with ease. You will have to work with the employees to ensure the smooth adoption of innovative solutions.

## 01

### Onboarding

Work with a service provider that makes sure the onboarding process is as smooth-sailing as possible. You will have to assign two dedicated employees to work closely with the provider. These onboarding specialists will be in charge of establishing communication lines between the service provider and your company. They will also take responsibility for setting up IT infrastructure and tending to other internal matters to integrate the new technology.

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## 03

### Integration

You can minimize people's resistance to the new technology by making it fit into your existing software stack. Efficient integration helps flatten the adoption curve.

Your service provider must be ready to confront the challenge of integrating advanced tech into your legacy system. They must be equipped to create a system that's custom and scalable.

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## 02

### Support

It's an inevitable fact—people resist change. So, make sure you work with a tech service provider that's willing to help you deal with the friction. Reliable providers offer 24/7 support.

Even if you have an onboarding team that's ready to provide help and clarification, your provider should still be involved. After all, they are the ones who have extensive knowledge about the product.

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*Video tutorials can help expedite onboarding. On-site training sessions may also work for some locations or groups of employees.*

# Inspiring your team to start using new technology

You will have to work closely with your legal team to fully adopt the new technology. Otherwise, your investments could go to waste. Here are a few tips that will help you tackle this.

## 01

### Planning

Put things into perspective for your legal team. Craft a plan that will help them realize how the new technology can help them meet their goals. Start by assessing your overall business goals and the role the legal team plays in achieving them. Determine gaps in the existing legal service loop by identifying problem areas, then outline your vision for the current landscape and strategize solutions.

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## 02

### Organizing

Work with lawyers and relevant staff when choosing the right software to address problem areas. Research available solutions, lay out the new tactics, and discuss the options with your legal team. Get your employees involved throughout the process of acquiring the software. This way, they'll be more receptive to the new tech.

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## 03

### Controlling

Once your team starts using the software, take the time to measure and analyze their work. Check in on their experience with the new program and track their progress. Remember to not only track your employer's, but also your software's productivity. Use a risk assessment matrix to see if the program is doing the job for you.

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# Tracking contractual obligations

In practice, contract administration often triggers disputes instead of preventing them. To mitigate damage and promote healthy cooperation, you should track obligations under a particular contract. You can try any of the following approaches.

## Contract matrix

A practical and easy-to-implement approach, contract, or operational matrix entails breaking down the contract into **understandable sections**. It provides insights that clarify key contract points and explains vague clauses. By combining technology, legal background, and analytics, you can make the contract understandable.

A well-functioning matrix includes the **following parameters**:

- Responsible persons/third parties
- Scope of services/deliverables
- Reporting date
- Due date
- Format of operation
- Actual delivery date
- Key contact people
- Specific performance requirements

Ensure you use details sparingly when compiling a contract matrix, lest it becomes just a copy of the actual contract. All the same, you don't want it to be so bare that you aren't able to provide ample information to team members. Aim to strike a balance.

## Contract parsing

You can track contractual obligations using automation. Contract parsing software gets the job done. Simply feed a signed contract into the system, and the software will read it and search for actionable information that can be broken down or parsed out into key terms. Without your assistance, the contract parsing tool can send information directly to the production team.

## Advanced contract drafting

You can start addressing contractual obligations in the early stages of the contract management lifecycle. Automatically saving key entries while drafting a contract prevents the need for further processing. You can then convert suitable options and fields from an automatically drafted contract into smart notifications and trackers. You can also use workflows to manage contract collaboration, negotiation, and approval across all stages of the life cycle.



*A well-compiled contract ensures all parties or business partners are on the same page.*

The key here is to find a software solution that automatically saves main entries from a contract, allowing you to **track your contractual obligations effectively**. It should notify the right people at the right time, reducing delays with contract notifications, task reminders, and alerts.

# Maintaining the quality of work

Check for the following main elements when assessing the quality of the contracts your department is producing.

## Visual appeal

Yes, the visual aspect of your contract matters. Make sure it is stylistically refined, branded, and identifiable. After all, your contracts are a visual representation of how much you value the partnership with your clients and vendors. Well-prepared contracts build trust while sloppy ones ruin reputations.

## Readability

What's readable for lawyers may not be as easy to comprehend for non-lawyer clients. To ensure readability, keep your contracts logically structured. Breaking the content into coherent sections also helps. An AI-based document management system can transform the legal text into simpler, easy-to-understand language.

## Searchability

Build a contract ecosystem that allows for predictive analysis, quick and easy access, and emphasis on contract value. You can make this happen by assigning metadata to crucial contract points.

## Flexibility

You often end up making changes to contracts when reviewing and renewing them. Make sure your system is flexible enough to support this. The software should allow you to quickly modify the contract while ensuring consistency across all duplicates.

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A custom document management system can automate many of your processes and organize massive amounts of data for you. With a significant load taken off, you will have more energy to focus on what truly matters for your department and the whole company.

AXDRAFT has the tech stack you need to create your own custom solutions. But don't just take our word for it. Download our brief product overview and try out our Instant Demo to see our system in action.

**Reach out to us, and we'll discuss how we can align our solutions to your needs.**

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