NRF *Transform*

Demand management & work allocation

Product brochure

Demand management & work allocation

The challenge for in-house teams

Legal work needs to be allocated efficiently and effectively, to the right resources and for the right price however this can be a challenge unless in-house teams know:

- What work is coming in and from whom;
- Who is doing that work currently;
- What service levels are required or expected by business stakeholders;
- How long the work actually takes;
- Where the pain points or bottlenecks are; and
- What the future strategic objectives and plans of the business are, that Legal needs to support.

Often, lack of data means decisions are made based on anecdotal evidence and assumptions. Teams complain of being overworked or business feels that work is 'stuck with legal' but **GCs lack sufficient visibility** to understand the **root cause** of the problem and therefore address it appropriately.

Ensuring that allocation decisions are **data led**, not only to inform work triage and resourcing, but also to track future performance and service levels against KPIs is key to a sustainable resourcing strategy. This allows in-house teams to evidence value add to the business and build a culture of continuous improvement.

Did you know?

Fewer than 50%
of in-house teams have created standardised legal instruction forms for the business

More than half
do not have a system to triage and track work or facilitate collaboration with business customers

More than 70%
do not have a system that provides regular updates on the status of matters

*Results from the Legal Operations Health Check benchmark (contact us for a copy)

Workflow Automation

How does one acquire that data, if the necessary tools and systems are not in place?

The tendency of many in-house teams is to go straight to the solution – usually to implement a workflow tool. However, technology should be the enabler, not the complete solution.

It is important to build a **proper foundation** to ensure that you see the full benefit of such automation tools, such as by:

- Ensuring that your team's **roles and responsibilities** are clearly defined and communicated.
- Consulting with business customers to understand and agree required **service levels**.
- Updating your **processes and policies** impacting work allocation, such as those governing legal outsourcing, escalations or approvals, to ensure that they are fit for purpose and streamlined.
- Planning appropriate **stakeholder engagement and change management** activities with your team and the wider business before, during and after any workflow automation project.

When selecting a tool, clearly map out your user requirements and consider whether you have anything in your **existing tech stack** which could be used or repurposed for workflow automation. This may cut through red tape during the approval process and enable you to gather data to support the business case for a more bespoke tool in the future if required.

Ensure that any tool selected can be **integrated** with other technology, such as knowledge management systems, contract automation tools, reporting dashboards or collaboration tools. This is critical to reducing **data silos** and introducing efficiencies.

Six steps methodology to get you started

Build a strong foundation before automating

Activity Blueprinting

Enables you to drill down into the tasks which your team is performing each day, providing actionable insights into who is doing what work, for how long and for whom.

Skills Mapping

Helps you identify key skills gaps in your current team, manage risks and map those needed for the legal department in the future to ensure appropriate work allocation.

Policy Review & Process Mapping

Ensures that your policies and processes are up to date, streamlined and fit for purpose in order to support automation.

Allocation Strategy

Driving the data led allocation of work, both to internal and external resources using structured decision tree methodology.

Tool Selection & Integration

Selecting the right tool for your needs, ensuring integration with your technology stack to reduce data silos, support analytics and MI reporting.

Analytics & MI Reporting

Using data to drive continuous improvement, inform strategic decision making and evidence value add to the business.

Allocation strategy

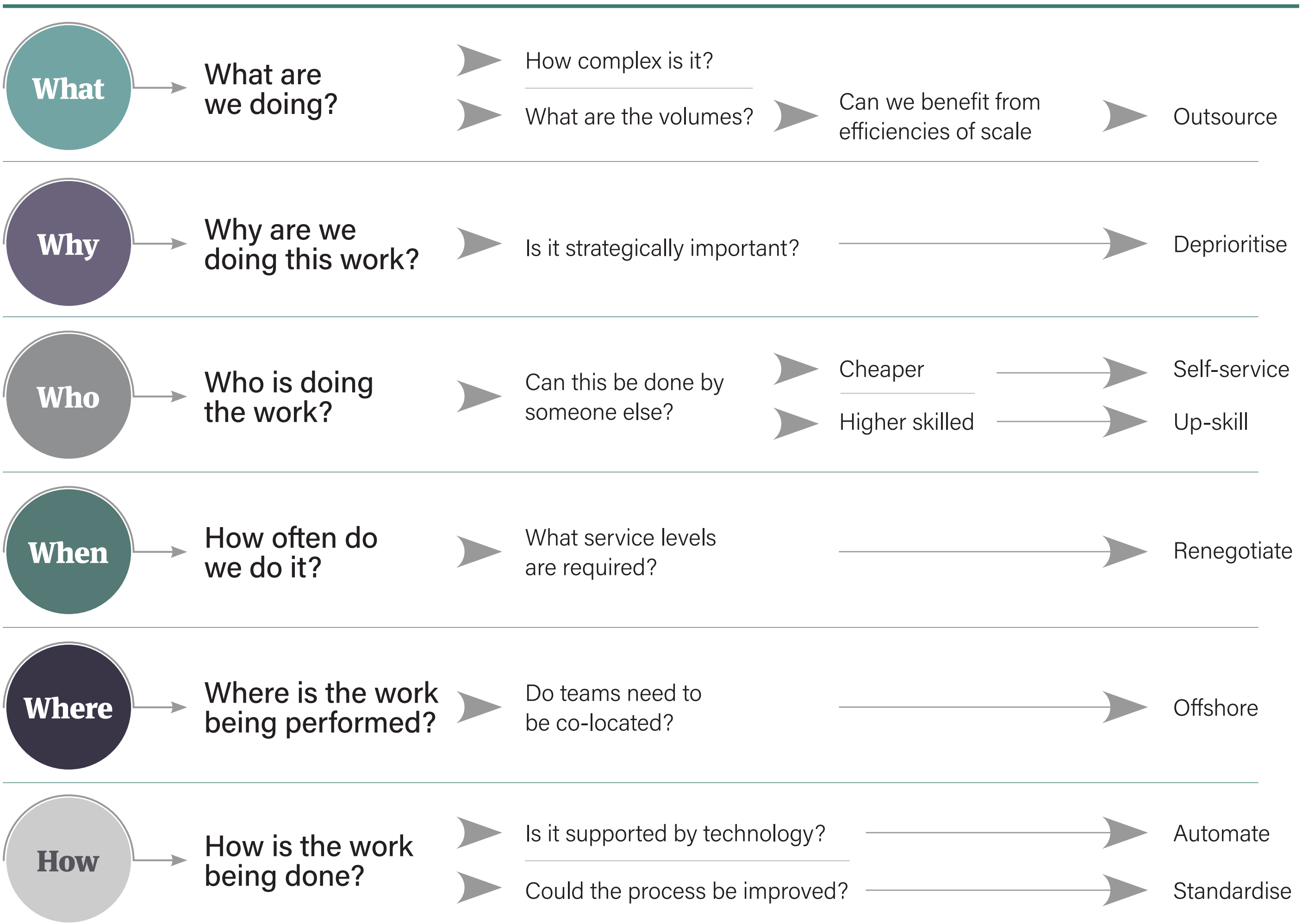
Developing a decision tree to support strategic work allocation

A clear, documented decision-making process for work allocation will ensure consistency and accountability provide credibility when reporting to or seeking approvals or budget from decision making bodies.

A decision tree can be a useful way to help you determine which tasks and activities should be allocated to which teams or resources. This can be principles based or more prescriptive.

Decision tree methodology should be informed by an activity blueprinting and skills mapping exercise which will enable you to make key decisions about work allocation in the future and also provide opportunities to identify and drive efficiencies, innovation and new ways of working.

The following is an illustrative example of decision tree methodology within the context of work allocation.



Next steps

How we can help you

Top Tip!

"Start somewhere, don't wait for perfect data. Use the high level numbers and trends to get you started"

Consulting services may include:	
Strategic Advisory Retainer	Providing strategic or operations advice to support you when you need it most. This can be delivered via a hotline or through regular calls with you and your team, offering you a high degree of flexibility along with budget certainty.
Activity Blueprinting	Conducting stakeholder interviews to select an appropriate tool or approach, developing a task taxonomy and facilitating the blueprinting exercise with your team. Analysing and visualising activity data sets to provide a map of what work is being done and by whom.
Skills Mapping	Developing a skills catalogue or competency framework for your department. Designing and implementing a skills assessment questionnaire and providing an analysis of the results.
Process mapping and policy review	Working with our Legal Designers to map and refine your key intake, triage and workflow processes . Together with our extensive global network of Lawyers and Risk Advisors, conducting a review of relevant policies to ensure they are both compliant and fit for purpose to support the automation of workflow activities.
Allocation Strategy	Designing decision tree methodology to support strategic work allocation. Applying the methodology to identify efficiencies and ensure work is allocated to the right place.
Technology Tool selection, development and implementation	Comparative analysis of third party tools on the market or development of bespoke tools using your existing licenses such as Microsoft 365. Implementation support, either through the allocation of project management resources or an implementation advisory retainer.
Analytics and MI Reporting	Building automated KPI dashboards and reports. Performing reviews of your data to track performance and service levels against KPIs.
Change Management	Facilitating or supporting the change management process to build consensus with your team and stakeholders and embed new processes, tools and technologies. Often overlooked, effective change management can increase the likelihood of a successful outcome. This may include designing a change management roadmap, conducting workshops with impacted employees, including your team in the design process, helping you communicate the benefits of the change to the wider business or creating feedback mechanisms.

Stéphanie Hamon

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Stéphanie, Head of Legal Operations Consulting, was previously at Barclays where she headed up what would become the Legal operations team for over three years. Under her leadership the department won "Legal operations team of the year" at the 2019 UK Legal 500 Awards. When transforming your in-house legal function, Stéphanie is ideally placed to advise on improving the management of your legal department.

Tammy Heydenrych

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Tammy, a Legal Operations Consultant, was formerly the Group Company Secretary and Senior Legal Advisor for Zurich Insurance's Southern African operations. With 17 years experience within the professional services, corporate and start up environments, Tammy has extensive expertise in corporate governance, stakeholder management, strategy formulation, operational design and delivering business transformation projects.

NRF *Transform*

NRF Transform is our global change and innovation programme. It aims to make how we deliver traditional services more effective and efficient, and to provide entirely new solutions to our client's most pressing business problems. It has over 150 staff in offices around the world, as well as 3 dedicated Hubs, and includes teams focusing on Applied Technology, Innovation, Legal Design, Legal Project Management, Legal Operations Consulting, Resource Management, and Commercial Management.

The Legal Operations Consulting Practice helps General Counsels and in-house legal teams optimise the delivery of legal services to their organisations, enabling them to go beyond managing legal risk and become a strategic business partner, supporting the wider objectives of the business.

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