



# GETTING STARTED GUIDE

This guide will provide you with practical advice  
and clear steps to easily kick-start  
the optimization of your legal processes.

## HOW TO BEGIN YOUR LEGAL OPERATIONS

---

The legal department is increasingly solicited for a multitude of tasks while simultaneously facing a reduction in resources.

This creates a paradoxical situation: the legal team is expected to do more with less. As a result, it becomes overloaded with tasks that do not always fall within its expertise, pulling it away from its key strategic role within the company.

To prevent this drift, it is crucial to strengthen legal operations. This allows the legal department to refocus on high-value tasks while finding more efficient ways to manage repetitive or lower-impact activities.

Not sure where to start with legal operations? This guide is here to help you. It offers a concrete method to align the legal department with the company's objectives through a clear diagnosis, a strategic plan, measurable performance indicators, and better resource management.

If you lack the time to implement these actions, no worries. Ops Legal is your partner to support you in all your initiatives to optimize legal operations.

## 1. OBJECTIVES AND VISION

Before anything else, it is essential that the legal department understands and aligns with the company's overall objectives.

By identifying what the business teams are aiming to accomplish, you can then define specific objectives for the legal department. The vision of the legal department must be clear and reflect the ambition to create a secure legal environment while enabling the company to grow efficiently.

### **ACTIONS TO TAKE:**

- **Organize meetings with key business teams to understand their strategic priorities.**
- **Translate these objectives into concrete legal actions and projects.**
- **Draft a vision for the legal department that reflects this synergy between business and legal.**
- **Regularly communicate this vision to your team and other departments to maintain close collaboration.**

## 2- DIAGNOSIS

Diagnosis is a key step to understand the strengths and weaknesses of your department.

You need to identify what the business teams expect from the legal department, the resources you have available, and the tasks that add value compared to those that consume time without notable impact.

This will allow you to redirect efforts where they will be most beneficial.

### **ACTIONS TO TAKE:**

- **Conduct a survey among business teams to gather feedback on the current legal support.**
- **Perform an audit of internal resources, whether human or technological.**
- **Identify repetitive tasks that could be automated or outsourced.**
- **Map existing processes and determine quick and long-term improvements to implement.**



### 3- STRATEGIC PLAN

Once the diagnosis is completed, it's time to build a strategic plan.

This involves selecting priority projects that will have the greatest impact and defining a clear action plan for each one.

This plan should be shared with and approved by the business teams to ensure alignment and cross-functional support.

#### **ACTIONS TO TAKE:**

- **Select high-impact priority projects based on the completed diagnosis.**
- **Create a detailed action plan for each project, including deadlines and responsible parties.**
- **Communicate this plan to the business teams and secure their support.**
- **Establish regular follow-up meetings to measure project progress.**

## 4- KPIS (KEY PERFORMANCE INDICATORS)

KPIs are essential tools for measuring the success of projects and the efficiency of the department.

They allow you to quantify results and track progress against set objectives. Well-designed dashboards can help visualize performance and communicate clearly with management.

### **ACTIONS TO TAKE:**

- **Identify relevant indicators for each project (e.g., contract processing times, number of disputes avoided).**
- **Create a dashboard to monitor these KPIs in real time.**
- **Train the team to interpret and use these KPIs to adjust actions based on results.**
- **Regularly present these KPIs to the business teams to demonstrate the added value of the legal department.**

## 5- RESOURCE OPTIMIZATION

Resource optimization involves efficiently utilizing the talents, technologies, and tools available within the legal department.

By making the most of internal skills and optimizing processes, the department can handle more high-value tasks with the same resources.

### **ACTIONS TO TAKE:**

- **Reallocate tasks within the team based on skills and strategic priorities.**
- **Ensure existing technological tools are used to their full potential.**
- **Implement training programs to enhance the team's competencies.**
- **Periodically review resource utilization to adjust priorities.**

## 6- OUTSOURCING LOW-VALUE TASKS

Repetitive tasks or those without high added value can often be outsourced or automated.

This allows the department to focus on more strategic missions and bring real value to the company.

Outsourcing can include low-cost legal services or the use of automation software.

### **ACTIONS TO TAKE:**

- **Identify low-value tasks that consume too much time (e.g., reviewing standard documents).**
- **Seek reliable external providers or automation tools to handle these tasks.**
- **Create a specifications document (playbook) for outsourcing to ensure quality service.**
- **Regularly supervise and evaluate the performance of external providers or outsourced tools.**



## CONCLUSION

One of the most important elements in this process is to include your entire legal team at every stage.

Change can be a source of apprehension, and by involving your team from the very beginning, you will reduce resistance and encourage the adoption of new practices. It's also important to recognize that not all projects will succeed as planned. But this should not discourage you or lead you to revert to the status quo.

True progress comes from experimentation. By testing new approaches and learning from what works—or doesn't—you enhance your legal department's ability to adapt and grow. This is how you will build a stronger, more agile legal service, better aligned with the company's strategic objectives.

Don't be afraid to take the plunge and make continuous improvements. Strengthening legal operations is an evolving process that will allow you, over time, to maximize the added value of the legal department for the entire company.



[veroniquegc@opslegal.com](mailto:veroniquegc@opslegal.com)



+514-290-7161



[www.opslegal.com](http://www.opslegal.com)