

Provider Name: CLE Companion

Title: General Counsel, Legal Leaders + Legal Operations. The Current and Future State of Legal Operations in Legal Practice

Presented by: Marla Crawford, Darth Vaughn, Casey Flaherty, Carolyn Renzin, and Kathryn Lowry

Date of Live Stream: 11/30/2023, Available on-demand until 12/31/23

Time of CLE Presentation: 60 minutes, 1:00-2:00 pm

Course Specialization: General CLE



CLE COURSE OUTLINE

Opening [6 minutes - CLOC Board Member: Adam Becker]

- 10+ years of “legal operations” – time to look at current state of how GCs and law firm leaders are utilizing legal operations professionals, where the discipline is now
- Offering this as a current state of play and provide some CLOC insights for lead attorneys. Providing CLE for our JD members and for the attorneys who supervise us – code will be read during the presentation. Idea generation
- Core-12 Overview
 - Origin and its relevance even as the legal industry continues to change
 - Slides and written material for CLE
- Introduce moderator

Moderator – Marla Crawford – General Counsel at Cimplifi and EAC Member

- Introductions of self and panel [3 minutes]
 - Carolyn Renzin – CLO and CCO at FanDuel
 - Darth Vaughn – Legal Ops at Ford Motor Co.
 - Katherine Lowry, Chief Information Officer at BakerHostetler
 - Casey Flaherty, LexFusion

Let’s start with what’s happening now and what’s developed recently [25 minutes]:

- What is legal operations handling now on a regular basis in your department?
 - GC
 - In House
 - Consultant
 - Does this reflect what law firm legal ops is doing as well?
- Can you discuss an example of a workstream or responsibility that legal ops now handles but used to be in the purview of the GC or other lead attorney?
- What are some of the legal ops revolutions/evolutions you’ve seen in recent years?

- Many legal ops leaders sit on their department/firm's senior leadership team. What perspectives are they bringing to organizational discussions?
- Do you think there's an ideal time to create a legal ops function in an organization – or is there a particular event or development that would be a catalyst for creating the role?
- How can someone calculate and analyze the ROI for a legal operations function?
- Legal Ops has a reputation for taking on one-off projects because we tend to get things done. What surprise benefits has legal ops provided to your organization that maybe no one anticipated?

Legal Ops love planning and preparing for the future. Let's talk about what could be coming [20 minutes]

- Looking at the Core-12 again, are there aspects you see emerging as more relevant with the advent of things like AI and other issues like regulatory concerns, risk, etc.?
- What's your advice for a GC or law firm leader thinking about starting a legal ops function? Let's start with the law firm perspective b/c we know some firms offer legal ops consulting to in-house departments.
- Where are in-house legal ops and law firm legal ops connecting and sharing best practices and what opportunities are still out there?
- **Closing [3 minutes- Moderator]**
 - Thank you and please submit feedback with CLE request forms – we'd like to offer similar programs for our attorney supervisors more regularly
 - Thank you to our panelists today
 - Make time to continue the conversation – talk internally, join a CLOC huddle or regional group meeting
 - Where to go / who to contact to get more information