

Empowering  
'in-house'  
lawyers to  
defend the  
ROI of their  
projects



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# Introduction

Right now, in the legal sector, a world of new opportunities and perspectives is opening up, the likes of which have certainly not been seen for a long time, if ever.

These new opportunities and perspectives come from new players in the market (examples such as Alternative Legal Service Providers, or the low-cost divisions of large law firms); of changes in the balance of power between law firms and corporate legal departments; or the irruption of legal tech, which is already taking us towards previously unsuspected scenarios and which represents a great help and change of mentality for the lawyer.

But there are also new opportunities and expectations for the very people who make up law firms and legal departments. **This ebook will focus precisely on how to enhance and empower the in-house lawyers**, with a detailed look at their profile, their role and their limits, giving them a strategic and not only an operational position within the organisations. **It is time for legal to apply for human and financial resources properly, just as marketing or sales does; in this guide we will give the arguments necessary to do so and to be able to obtain those resources.**

When it comes to legal transformation, it always starts with people. This ebook is about those people, about the in-house lawyer, their challenges, needs, difficulties, and virtues.



# 1. Role and functions of the legal area and the in-house lawyer. A much-needed change of outlook

It is still quite common among companies that have an in-house legal department that there is a somewhat distorted view of the legal area, its role and functions and, therefore, of the in-house lawyer.

This biased and inconsistent vision with the importance for any company today, and in any sector, compliance with the law makes sense in the way the organisation, its CEO and its entire management team, relate to the legal sphere; to the legal, as it is more colloquially called.

The relationship has usually been built on ignorance and the discomfort that this generates, at the very least, or on rejection, suspicion or aversion in the worst case. Thus, a relationship is built in which the further away from the legal, the better.

In contrast, there are other options for building this relationship which, when applied, result in a much more natural, organic and strategic integration of the legal sphere within organisations. They consist of creating the relationship with the legal from curiosity, opportunity, innovation, understanding, holistic integration in the organisation, etc.

This construction is not only possible, but it is most aligned with today's demands on companies for due diligence and accountability (both in terms of financial and non-financial reporting), as well as compliance with SDGs and ESG criteria.

Therefore, this change of relationship and, before that, of outlook, must take place in companies and organisations if they are to become solid and sustainable legal operators in the medium to long term, as well as more aware entities.



# 1.1. Misperception of the legal area as a cost & operational centre, rather than as a centre of opportunity and strategic role

Closely linked to the type of relationship the organisation has established with the legal field, the legal department will also have been defined as a cost centre of opportunity and therefore strategic. **It is a natural consequence of the type of relationship that the organisation, its CEO and management, have chosen with respect to the legal area.**

Some of the traits present in the legal departments of companies that have this misperception of the department as a cost centre are the following:

- ✗ The area is set up as a **service department**.
- ✗ It reports **hierarchically and functionally to the financial management** or even on human resources management.
- ✗ It does not have or **does not freely manage its own budget**.
- ✗ It has **important limitations for a correct allocation of resources**. Above all, it suffers from an incorrect dimensioning that leads its members to a continuous overload of work and to live permanently in extreme urgency.
- ✗ **Access to digital transformation is denied** because it is considered to be a non-priority investment, even if such a commitment is being made within the organisation concerning other departments or areas.



It is a biased view of the legal department, its role, functions, autonomy and independence, resourcing, and is not in keeping with the times and the legal needs of business today.

**The legal department is perceived as a necessary evil to be endured.** That relationship that is defined as neither with you, nor without you. Companies want to have a legal department, but to do what needs to be done –formalities or execution of decisions, i.e. reactive– and to keep it quiet in the meantime –the discretion of the department that has to be up to the task and cope with the situation without complaining–.



In contrast, in organisations where the legal department is configured as a centre of opportunity and strategy, the traits of the legal department are completely different:

- ✓ It reports hierarchically to the general management and has a direct and close relationship with the board of directors, in many cases as the secretary of the board and in other cases because it performs governance functions within the organisation.
- ✓ The legal area in all of the company's committees and decision-making bodies, with voice and vote, on an equal footing with the rest of the company's corporate management.
- ✓ It is present in projects from its conceptualisation, relied upon in the approach and development of these projects, even when this approach initially has to cause the project to be rethought in order to ensure the sustainability of the business in the medium and long term.
- ✓ It has adequate resources, in accordance with the volume of work it undertakes and the volume of business it handles; this is important, as the greater the volume of business it handles and the greater the risk assessment it must carry out, the greater the importance of its advice.

- ✓ It has its own budget and manages it freely.
- ✓ The legal area has the necessary time to re-evaluate its work, processes and strategy, and thus to strategically readjust its mission, vision, values, strategy and action plan.

In these cases, the legal department is perceived, defined and integrated as a **centre of opportunity and value**, since it is what it provides: VALUE.

The legal department itself, in these cases, **does not need to focus on self-definition, self-advocacy or self-positioning**. The organisation has already done so because it has given it its natural place and the legal department has taken it and developed in coherence, consistency and responsibility for the work it does and the value it brings.

**A positive, integrating, respectful and understanding relationship with the legal area** allows us to build a legal department that, from the natural space that corresponds to it and the respect of the rest of the organisation, **will be able to contribute value in a continuous, exponential manner** and offer the organisation a quality of business life based on security, knowledge and openness to new opportunities in a sustainable manner over time.

## 1.2. Current definition of the functions of the legal area. Lack of correct definition of what the legal area is and what can lead to failure

In legal consultancy projects for companies' legal departments, there is often a recurring unmet need: the need to redefine what the legal function is and (not because it is obvious, but because it is necessary) what it is not.

**When asked about the role and functions of the legal department in the organisation, the answers are diverse.**

- ✓ In many cases, the definition is so broad and all-encompassing that it is understandable that the department and its members are completely overwhelmed.

The legal department has become, with its willingness to serve and to be seen as essential to the organisation, a catch-all.

In these cases, the urgent takes precedence over the important, and there is a risk of losing sight of the strategic work of the legal department and becoming a paper and document clerk in the service of someone else's urgency.

- ✓ In other cases, moreover, the legal department has integrated into its definition of role and functions to be the guarantor of compliance with the law in everything the company does.

This is contradictory in itself, since it is not possible to guarantee the achievement of something if one does not have the power to decide about it.

In other words, **the legal department cannot be the guarantor that the company's activities always comply with the law**, because the decision whether or not to develop those activities and the way in which they are ultimately planned, developed and executed is not for the legal department; they are not decisions taken by the legal department. This is a fallacy.

This happens when, among other things, the legal department has not yet carried out a process of deep reflection on its purpose, nor has it defined its own strategy and service model within the organisation, nor has it done so in a way that is aligned with the company's purpose and strategy.

Carrying out this exercise of deep reflection, self-analysis and definition provides order to the legal department and also to the organisation, as well as generating a real sense of belonging and evidence to its members and to the rest of the organisation that the legal department, like them, has its own strategy that is aligned with the company's strategy and that is at least as strategic for the business as any of the departments that are already visible as such in the organisation.

When this exercise has not been carried out, **the legal department runs the risk of becoming confused and getting lost or dragged down by a self-perception** of itself as something that must be at the disposal of the rest of the organisation, its needs, its rhythms, its efficiencies or inefficiencies.

With the additional risk of falling into a vicious circle from which it is very difficult to escape, which is the one generated by thinking that the more and better service the legal department provides to the organisation, the better valued it will be as a department and the more indispensable it will be. Legal might get it, but the cost is very high. It will be relegated to a service department, to the aforementioned catch-all within the organisation, and it will be difficult to get it out of there.

The main function of the legal department is not to deal with everything that happens in the company, whatever it is, whether or not it should be handled and resolved by this department.

The main function of legal is that of an **advisor to the organisation, one who assists and defends the rights and interests of the organisation itself** –the very etymology of the word lawyer demonstrates this–, even when the rights and interests need to be protected from the organisation's own management bodies, hence the need for independence from the legal department.

Only from the central function of the advisor will the genuine and primary function of the legal department be truly developed.





## 1.3. Profile and role of today's in-house lawyer: high (self-) demands and low (self-) recognition

At the head of today's corporate legal departments we find **technically highly qualified profiles**, with a previous professional background that has allowed them to have seen and experienced first-hand different realities and environments in the practice of the legal profession. The in-house lawyer has a more or less solid network of relationships that help them to carry out their functions within the department and the firm.

Their arrival in the world of business is usually desired and premeditated on their part. In other words, **they have a real vocation for advising the company**, not as a client, but as an integral part of it.

In the cases in which the jump to internal company legal advice is something that has occurred more accidentally when the lawyer knows and adapts to the form of advice demanded by the company, the in-house lawyer tends to experiment and develop this vocation we were talking about earlier.

However, it is also necessary to take an honest look at the day-to-day life of this type of professional in the company and the level of demands they live under, as well as the return or recognition they receive in return.

**Their daily life is very stressful.** If the legal department is not well sized, which is often the case, its director and the rest of its members live in continuous urgency, with no time for reflection barely organising the issues as they come in, assigning them to the team and a long etcetera of tasks.

In this type of environment, with high volumes of work, **much of which is work that requires research, development, and a creative approach** to align business needs with legal requirements, the in-house develops important skills:

- ✓ **Speed** in the legal exploration of the issues raised.
- ✓ Identification of what is **really essential** to elucidate from a legal point of view in these.
- ✓ **Extensive work developing the pros and cons**, advantages and disadvantages, as well as risk assessment, of each of the legal resolution options with which it works.
- ✓ Translation of all this analysis and **development into a simplified and intelligible version** to facilitate decision making by the management team with real, effective and understandable knowledge.
- ✓ On many occasions, when required –and this happens quite frequently, if not always–, **determination of the most viable and sustainable legal alternative to address the specific case**, without hesitation, with a yes or no to the different options evaluated.



The evolution as a professional in this environment and in this daily reality **demands from this type of professional a high level of self-demand**, which, in addition, is also fed by the very high levels of demand that the organisation itself imposes on the legal department, its director and the rest of in-house lawyers. Because, unfortunately, **it seems that the legal department is one of the areas where there is no room for error.**

In contrast, these high doses of (self-) demand are not usually accompanied by the corresponding (self-) recognition. Neither on the part of the organisation in many cases, nor on the part of the in-house lawyers. **When someone lives in perfectionism and self-demanding, it is difficult to be able to recognise oneself as someone who has done something well above average**, because things can always be done better and because it is often the smallest detail that is left uncovered, that the enormous task of order, systematisation, rationalisation, evaluation and creativity that was carried out to provide a solution in line with the business, legally secure and sustainable over time.

As a result, in-house lawyers are increasingly faced with the need to develop a conscious self-leadership that allows them to withstand this continuous pressure without succumbing to it, but without succumbing to it, defining his own purpose within the organisation, its values, its strategy, its objectives and the way in which it wants to achieve them, all in full alignment with the organisation's purpose, values, strategy and objectives. And, of course, that it also allows them to be happy and fulfilled in their jobs.

**This self-leadership, like any leadership, starts from the basic premise of self-knowledge.**

Investing in this process of self-knowledge and self-leadership by in-house lawyers will lead them to develop a deeper understanding of themselves, with its lights and shadows, to accept them in order to become stronger as a person and in their professional role, also getting to know and accept more and better the other members of the organisation, as well as all of its stakeholders.

After all, it is about cultivating and developing, more and more and better, the traits of highly functional people. These are features which, as will be seen when analysing their detail, are already present in many cases, to a greater or lesser extent, in the teams of today's legal departments, but which need to be consciously and orderly incorporated.

Carl Rogers, one of the pioneers of humanistic psychology, defined highly functional people as those with the following traits:

- ✓ **FLEXIBILITY AND ADAPTABILITY**  
It is a person who is in a changing reality, who lives life attending to it and who constantly adapts to circumstances.
- ✓ **EMOTIONAL MANAGEMENT**  
Live open to the experience and in living the experience, accept the emotions that are generated, whether positive or negative.
- ✓ **DON'T JUDGE. ACTIVELY LISTEN**  
Avoid the tendency to prejudge, focus on the other, listen to them and accept them as they are.
- ✓ **SELF-CONFIDENCE**  
Confidence in oneself and in others, from that confidence, generates confidence.
- ✓ **CREATIVITY**  
Freedom of choice and that freedom makes them find new options when there are seemingly few.
- ✓ **CONSTRUCTIVE**  
It configures the crisis as an opportunity to build, to go towards the future.
- ✓ **TRAINING**  
They constantly nurture personal development through training.



In addition to this process of self-knowledge, a process of empowerment is also necessary. There are many ways to do this; everyone must find their own. But there is one that is often very effective and that is **the incorporation of innovation within the legal department and each and every one of its members.**

- **The way the profession is understood and developed**, through training in legal operations, legal project management, legal design, agile methodology or no-code programming in document automation.
- Knowledge and **analysis of the current rich ecosystem of legal service providers** –ALSP, new law firms, legal outsourcing firms...–.
- **Training in counselling and persuasive communication techniques, NLP** and other resources to equip professionals with active listening and much deeper and more effective communication.
- **The organisation and planning of the issues to be dealt with from the project management methodology**, interacting with the rest of the company in a cross-cutting manner.
- **The visibility of the department and all its members in the organisation**, as well as the objectives undertaken and the achievements and successes achieved.



## 1.4. How to manage the difficulty in requesting and obtaining the necessary resources



One of the difficult times of the year for every legal director is negotiating their budget or any additional items they need to fund in order to acquire, increasing or modifying the resources of all types available to it.

First, because **lawyers (and in-house lawyers as well) are neither usually comfortable with money issues, nor with asking.** They are used to giving, assisting, helping, accompanying and solving, but not so much to receive.

They are good at arguing how this or that is going to help, why this or that solution should be adopted, **but not so good at requesting what they need to be able to carry out their functions in an organised way,** balanced between what they give and what they receive.

And second, because when they ask, **given their discomfort with the request, they do not feel entitled to do so,** and they do it by establishing a child-like relationship with the one who must authorise the expenditure or investment, rather than an adult relationship.

**The adult maintains difficult conversations in an organised, assertive and constructive way and is clear about objectives,** as well as the arguments to be used to get authorisation for what is needed for the department to be able to function and provide the same or more value than the rest of the company's departments.

**Specifically, these types of conversations should be held:**

- With the internal conviction that the department is being given the resources it needs to function optimally. To move away from the position of asking, **to move towards the position of objectivity, that in order to provide an optimal service, it is necessary to have the necessary resources** and dimensioned to the service provided.
- At the right time and place.
- Only with the person who really has to make the decision, without playing the game of presumably well-intentioned intermediaries. **One's interests, however much more comfortable it may be to delegate their defence to a third party, must be advocated by oneself**, as no one knows better what one needs, why, for what purpose and what return one will get from it than oneself.
- Having **analysed very well the why and what for** of the resources you are requesting.
- **Providing objective investment data** (never talk about costs) and return on investment. Here the provider of the resource in question, e.g. a software solution, should assist by providing these sales arguments. It should be noted that companies dedicated to implementing solutions for legal departments have experience in a multitude of projects, and can provide case studies and improvement metrics achieved with the proposed measure.
- **Contextualising the amount of the investment in relation to the volume of business and risk** already being addressed by the department and that which will be covered by this new allocation of resources.
- **Providing objective data on what the competition is doing and achieving** by having such resources.
- **Legitimising the investment**, if necessary, by mere comparison with the investment made in other areas and the return on investment in those areas.



## 1.5. A new look at the legal area and the in-house lawyer's place in the organisation

The in-house lawyer is not the guarantor of the organisation's compliance with the regulations. However, **it does have a natural role to play in ensuring the medium- and long-term sustainability of the organisation.**

In the current regulatory context, it is not only essential to analyse the activities that the organisation performs or plans to perform from a risk management perspective (detection, assessment, control and monitoring), but also **need to be analysed in the light of the reputational and social impact (ESG criteria) that such activities will have.**

This is essential not only for an intimate reason of coherence or the ethics of the organisation itself, but also for a more practical reason: the increasing impact that these factors have on the consumption or purchasing decisions of these companies' target audiences.

**The in-house lawyer's transversal vision of the company, its activities, its risks and its decision-making and influencing processes,** as well as the regulatory framework to which the company is subject and the degree of compliance with it that it has or has not consolidated, it is precisely this figure who can best undertake this task of bobbin lace-making.

Furthermore, the **traits that should be present in every in-house lawyer should be independence and objectivity.** This work should be undertaken even against the company's local management, when there is a conflict or collision of interests between management's own interests, which are usually driven by factors such as the achievement of short- and medium-term objectives, and those best suited to maintaining the stability and sustainability of the business in the medium and long term.

Ultimately, it is a function of preserving and defending the organisation's interests over the interests of its different stakeholders, including its management team. **The defence of the corporate culture beyond the achievement of immediate economic results, in order to preserve the continuity and sustainability of the organisation and its wealth production over time.**





## 1.6. From a strong police role to a weak police role

Finally, another bias that often occurs in the legal area and which mainly affects legal department managers is that they are **required to behave in a somewhat contradictory manner**.

On the one hand, it is required to adopt a **strong role of authority over the organisation**, so that the legal criteria set by the legal department are integrated and respected.

**On the other hand, it is required to be much more discreet and even weak, of submission**, in terms of their real ascendancy over the organisation, the legal directors and the department they head are not able to move towards a position of true leadership and integration into the management team on an equal footing with the rest of the organisation's managers and departments.

**It is a difficult task, to be sure, but a very necessary one, which can only be carried out by the person concerned.** And it should be developed in accordance with the idiosyncrasies and natural or learned resources of each individual, as well as in accordance with the corporate culture of the organisation in question, **because the role of the in-house lawyer and director of the legal area cannot be confused and manipulated** in either of these two approaches.

There are two approaches that, first, generate in the person a feeling of continuous contradiction and confusion that will lead to a dissonance that is difficult to cope with in the medium to long term. Second, they are not consistent with the role of a business partner and strategic department that the area must assume.

**Each organisation is different and each legal area will need to understand what the soul of that organisation is**, their actual corporate culture, and build this business partner relationship around it, building on the natural attributes of the manager and the rest of the team and adapting to the needs of the organisation, but always from the authenticity of what you have defined as the identity of the legal area (purpose, values, strategy, objectives, action plan...).

This authenticity and identity will help the legal area as a reliable compass when defining models of action, positions or ways of relating, consciously and defined from the inside out and by its own members, without being driven or manipulated by the interests, desires, needs of others within the organisation.



## 2. How to position the legal area

### 2.1. Strategic redefinition of the area: definition of strategy and communication. The importance of legal operations within the area and how to use them for positioning and efficiency

If the legal department wants to be strategic within and for the organisation, one of the first steps to take is to think and act with the same business rigour in its management as any other department in the company, in particular, the departments that are normally seen as strategic areas (such as finance, which is also a service department).

In other words, it's about managing the legal department in a business-like manner, by following the parameters that other strategic areas have already internalised and constantly apply.





Legal operations help us achieve this. A tool that brings order to the area and allows us:

- **Generate a new way of seeing and living the direction and management of the area**, organising, thinking, planning, always based on the strategy and strategic planning that we have defined. **In other words, direct and manage from what is relevant and not from what is urgent.**
- **Define the area's strategy, aligned with the company's strategy**, in order to identify where the essential contribution of the legal area must be within the company in order to successfully achieve, thanks also to this area, the company's strategic objectives and manage the day-to-day running of the company, then, with this compass of strategic objectives for the area. This translates into leading and managing by strategic objectives and not by the urgencies of the organisation.
- **Review and optimise processes and resources.** Yes, we are talking about both concepts, as it is as important to optimise processes as it is to optimise resources. **One of the great evils in in-house consultancies is the oversizing of work in proportion to the human, technological, and structural resources...** available to them.
- **Selecting and managing suppliers**, using new techniques to achieve the best value for money.
- **Define and establish indicators** that allow obtaining the necessary and sufficient data to carry out the reporting function based on data and risk levels.

There are many virtues of legal operations, as just detailed, but the main one is that they **change the mindset of the director of the legal department and the rest of the team**, so that the reality of the legal area can be visualised and experienced from a business, not merely technical, approach, and that the in-house legal advice service **is defined and planned on the basis of strategic planning and not on the basis of day-to-day urgency**.

This change in mindset, coupled with the increased efficiency of the department and this strategic focus and planning, will help **the legal area to reposition itself in the organisation and be seen in a new light by the rest of the organisation, including management**.

Another fundamental element of this whole process is **communication**. What is not communicated does not exist, and lawyers tend not to communicate too much about their achievements, to keep a low profile.

In this case, the communication of the project for the implementation of legal operations in the legal area, the definition and strategic planning of the department, the objectives, and the action plan to be followed is essential to promote and consolidate change in the perception of the rest of the organisation.

When, in addition, **it has been possible to involve the general management and have their direct support, both in the process and in its communication, the repositioning of the area as a strategic one is guaranteed**.



## 2.2. Indispensable principles in the process of providing assistance to other areas



As already discussed in a previous point, **the legal function needs to be defined precisely in order to differentiate what belongs to the legal area, but also what does not belong to it.**

**It is important to define the service model under which in-house legal advice is to operate according to the management's expectations.** This definition, if it is to be a true business partner, **should not only be concerned with a logical and efficient organisation of work within the department, but also to a correct identification of the tasks in which it is important or essential for the legal area to intervene** because of their value contribution and those in which it is not, either because of the low economic importance of the transactions in question, or because of the low risk impact of such operations, or for any other duly justified reasons. Finally, to the correct coverage of the organisation's needs in the easiest and most agile way possible.

Thus, there will be purely administrative tasks that can be removed from the agendas of the department's lawyers and handled by other professionals in the organisation, even outside the legal department. Other tasks may be standardised, **through document automation technology** that allow for the direct generation of documentation following standardised guidelines per legal by the rest of the organisation, and that may involve a service model defined as "self-service".

**Others will simply have to be excluded from the review of the legal area** by explicit agreement with management in light of the low risk impact such operations pose to the company.



In addition, in the process of assistance and support from the legal department to the rest of the organisation, **a number of guiding principles should be kept in mind in how to assist in order to make that assistance effective.** These principles are as follows:

- ✓ **Be very balanced when giving aid**, being conscious of giving what we have available, but not more or less. For example, one should not assume something, or not decide something, that is not the lawyer's responsibility and that is the responsibility of the assisted person. It is a way of giving what one does not have and also of denying the other person the opportunity that life is giving him or her to develop and grow by facing this challenge or task.
- ✓ **Explore and define what help they are asking for**, what exact help can be given according to the circumstances with the context they are in at the time. It is not up to the lawyer to force the situation and go beyond what is requested because the company itself is probably not yet ready.
- ✓ **Providing assistance from the adult position**—that is, from someone who lives in the present, in the here and now, and analyses the situation based on that here and now, without being conditioned by past learning, nor by invalidating beliefs or constraints— and to ensure that those who consult also do so as adults.
- ✓ **Address the query received and provide help from a systemic perspective**, without focusing exclusively on the cause of the problem, nor on the culprits, but on everything that in the organisation, as a system, that has led to this situation. Look at what that problem or situation exposes about the regular or irregular functioning of the organisation and propose solutions that seek a comprehensive response to the problem and not just to that specific cause that has manifested itself.
- ✓ **Do not judge.** The role of the legal team is not to distinguish right from wrong. Their role is to help the other to make the company work, to achieve the objectives. Therefore, it is not possible to help others if they are judged.

## 2.3. Building strategic alliances with mirror areas

Within the organisation, there are other areas which, like the legal department, present a series of common difficulties in their strategic definition, in their capacity to influence and permeability in the organisation, as well as their integration in decision-making processes

These areas, which could be called mirror areas, could be the corporate governance area, the compliance area or the controlling area. They are natural allies of the legal department, and building strategic alliances with them would be a way to work and build shared strategic objectives and improve the chances of achieving them, generating more impact and raising the level of legal culture within the organisation.



## 2.4. Improving the perception of the legal area, working in collaboration with other business areas



The company, like any other system, is made up of people, and **what is fundamental in people is their ability to create and generate links.**

When you want the perception of legal to change, **you first carry out an important introspection process and modify what is necessary**, but then also have to get those who are used to seeing legal as a service department, not a strategic one, change their perception.

This is difficult and cannot be achieved in a day, but perseverance in building a new collaborative relationship with the rest of the organisation's areas will surely bear fruit.

To do this, it will not only be necessary to work on interpersonal relationships with the members of the other areas, by showing them see the profound change that has taken place in the legal department and its members, but **it will also be necessary to communicate with these other areas following business communication guidelines** that are not normally used in the legal department.

**Using the language of the business will be a very effective tool for this.** When a legal response is required, contextualising the response by incorporating the positive or negative consequences for the business of what is being evaluated or responded to will be very beneficial in achieving this change in perception. Knowing and quantifying the risks and benefits associated with a desired action helps and supports the decision-maker.

## 3. Defence of the budget of the legal area



When asked for a budget by the legal area, the management team often demands numbers, key indicators to support the project. **But the legal area has neither the time nor the means to focus on the strategic side of its department to generate them.** Drowned in the day-to-day, they are focused on surviving the myriad tasks at hand, with no time to analyse the strategic implications of their department.

But the legal area must exercise its worth, motivate a change of mentality in its team so that it is valued as it should be. **Just as other departments in the company receive large budgets and are aware of how much they contribute to the business,** legal must step up and defend, with objective data, the benefits it brings to the company.

### 3.1. Request and defence of the area's budget

The often **high levels of demand and self-demanding legal requirements must be rewarded.** The company must be made to see that legal is one of the most important strategic areas and that this requires a change of mindset. The team should carry out an analysis of what it brings to the company's business, of the legal damage it avoids, of how necessary it is for even the most important decisions.

The position of legal in the company's organisational chart, whatever it may be, should not be a brake on the department. It is necessary to start thinking about what it should be, where the legal directors want their teams to be in the company. **Only in this way, by being counted among one of the key players in the business, will one aspire to receive what the department truly deserves.**

**Another action to note is that of asking.** Legal directors must ask without fear of rejection, defend their position by being aware of the great value their department generates, without belittling or comparing. **It must chisel home the idea that the role of the legal area is that of a facilitator, not a blocker,** of processes, operations and security for the company.

**This will help them to advocate and ask for a budget while being aware of their own value.** Legal is no longer a cost department. It is a critical strategic area for the business, so it must be budgeted accordingly and its needs must be met in order to provide the best possible service.



## 3.2. Internal sales arguments to defend projects that need financial approval

The legal department has often been considered the "no" department, the one that delays agreements, not because it is slow, but because of the great detail that has to be given to each matter. **But the idea that legal is an inefficient department must be fought.**

**Thanks to the aforementioned change of mindset, new innovative projects and legal tech, the legal area can optimise its processes and focus on tasks that generate real added value for the company.** In this process, legal will see how new projects emerge that will require approval. So now is the time to defend them internally, knowing that a small step in the present can mark the successes of the coming decades.

- **The proposal of a process modernisation project**, the implementation of a new technology, is a step forward not only for legal but also for the rest of the business. **Digitisation, in such a changing world, is a necessary step and strategic departments such as legal cannot be left behind** for the general good of the business.
- **Legal department should focus not on what it already helps, but what could help the company.** In the field of contract management, for example, studies show that companies lose up to 9% of annual profit due to poor management. **If legal is supported by the necessary technology, it can help documents in the company regain the value they deserve.**
- **If legal is allowed to optimise its processes and propose innovative projects, this department will not only greatly improve its own efficiency and offer more effective advice.** Other areas such as sales, procurement, human resources..., with which legal actively participates and collaborates, will also see how their processes transform and become more efficient, with a boost from legal that they couldn't receive before.
- **It is very necessary to measure the ROI of the technology or project you want to implement.** For this purpose, it is essential to analyse the time and money taken by the current processes in the legal department that are to be improved with a new project. Then, legal needs to take note of the costs involved in implementing the project and, finally, what benefits will be obtained after the project has been implemented. It is most likely that a figure will be achieved that will serve as a definitive argument for legal to sell its project.
- **It should be noted that, with an adequate strategy, the legal department contributes directly to the elimination of legal contingencies for companies.** Therefore, legal needs to sell itself as a major legal cost-saving agent for companies: as it can avoid legal contingencies arising from security breaches, it leaves behind millions in penalties.

### 3.3. Tips to succeed in the cultural change of digital transformation



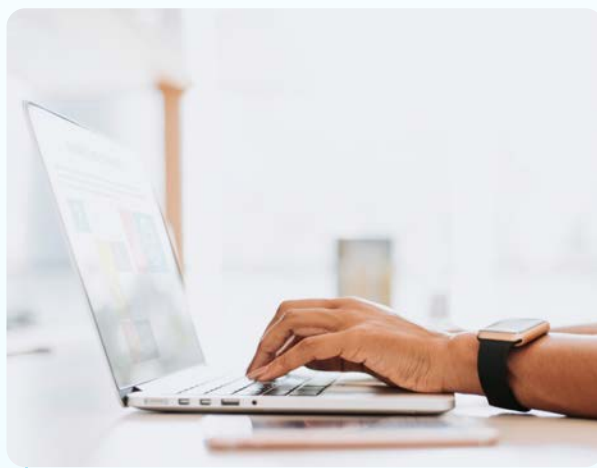
The digital transformation of the legal department does only require the choice of a technology or a digitisation project and the acceptance of a budget by the company's management. **The most important step comes when a cultural change that drives digitisation from the ground up must be made.**

**Once a technology or a new change project is chosen, the legal department is amazed by the possibilities it will offer once implemented.** They know full well that their application pays off, that it will have a considerable return on investment and that the way it handles certain processes will benefit greatly, but there is an obstacle in front of them: **certain processes in the department and in the company need to be changed.**

**How to deal with this cultural change?** Along the way, the legal department will encounter stoppers, barriers such as limited budgets, difficulty of integrations... In the face of all this, they should bear in mind what has convinced them: First and foremost, you must keep in mind what has convinced you, why this project will benefit not only your area but also the strategy of the business and the rest of the departments.

## STEPS FOR A SUCCESSFUL CULTURE CHANGE

- In the face of limited budgets, **the technological ROI of the new project must be valued**, rethink current operations and visualise the department of the future.
- **Instilling a vision of learning and innovation in the team will help the changes to be perceived as a positive step.** Eliminating the traditional is not always risky.
- Rome was not built in a day. **Change must start piecemeal**, looking first for technological allies, people who are more adaptable and familiar with change.
- **Participating in technology events and keeping up to date with the latest innovation news** will help the team find value and alternative solutions.
- **Encouraging the cross-functional vision of the legal team** will help other departments see how they can better collaborate with legal, providing it with the resources it needs and implementing solutions that favour the self-service of the other areas.
- **Facilitating training and education is a fundamental basis for cultural change.** In the face of ignorance, it is necessary to teach the novelty and its benefits.
- **The necessary solutions must be sought**, which can be easily integrated into the department's existing solutions to streamline processes, not to change the entire operation without first analysing the needs of the department.
- **The greatest stopper of all is oneself.** Pushing oneself to learn and engage in innovation will help to find effective ways of working and forward-looking solutions.



### THREE KEYS TO SUCCESSFUL TECHNOLOGY IMPLEMENTATION

1. Find a small group of tech-savvy or technologically inclined people and explain the new process to them.
2. From there, this change in mentality and the advantages of the new process are extended to the rest of the staff. They must be properly informed and the benefits of the new working methods must be explained.
3. Establish a support service, which receives queries and incidents, and carry out training to educate the different teams on what they need.

## 4. Analysis of the appropriate tools for the legal area

### 4.1. Learning to select the optimal tools

- The legal team must choose **technology that works for people**, that brings out the best in its professionals and turns them into superheroes.
- It is recommended that **the chosen technology has a defined roadmap** and clear expectations for software development. It is striking and advisable that it is complete, that it offers a good variety of functionalities but, above all, that these are always adapted to the needs of the legal department.
- **The software must offer the highest security standards.** To this end, it is essential to verify that the processes are safe and have adequate certification.
- When implementing the software, **it must be verified that it has an adequate onboarding service**, and ensure that it accompanies clients in the preparation stage of the platform.
- It is a plus that the software has options for **customisation with the corporate image** and that it offers support for connecting to third-party applications, via APIs, for example.
- **Once the software is implemented and ready to be used, it must be ensured that the supplier will continue to provide support**, with training for different profiles and a continuous user support service to ensure a successful implementation in the organisation.
- Various options chosen, **it is advisable to look for reviews on software comparators such as Capterra, Softdoit or GetApp.** It is also possible to ask for references from acquaintances who have implemented it or even from companies in the sector that have worked with it.





## 4.2. How the CLM boosts the legal department's contribution to the organisation

- **Increase efficiency.** Contract Lifecycle Management (CLM) streamlines each step of the contract lifecycle and saves lawyers time to provide high-value-added tasks. **The combination of technologies that accompany the entire documentary process from a CLM drives the results of legal teams.** Only document automation makes it possible to create tailor-made legal documents error-free and 90% faster than in the traditional way.
- **Employees who need to create contracts need only to complete a simple form,** with all options previously arranged by the legal department. In one click, they have a tailor-made document with the full assurance that it meets the standards set by legal counsel. Thus, a self-service on legal documents is established and the legal department ensures that the documents are error-free.
- **The CLM avoids leaps of faith on contracts.** It allows increased security, using document automation to standardise the creation of contracts. Then, from a single platform, it ensures the entire lifecycle of the contract until its signing and subsequent renewals, updates or terminations.
- **It connects legally with the rest of the teams.** It centralises knowledge and decentralises the generation of legal documentation. Scale up collaboration. Bring legal closer to other teams with an intuitive solution, making legal documents centrally available in the cloud.
- Thanks to CLM, **control over the processes is ensured,** as access to contracts is maintained only to those people the legal team deems necessary, from a single platform. Different actors, departments, and even third parties outside the organisation, are involved in the documentation process. The same applies to collaboration and signature, which are managed from the same platform, through fully customisable permissions.
- Within weeks, months, or years, contracts must be reviewed, renewed, updated, or terminated. To do this, any in-house lawyer can **create different alarms from the CLM platform, depending on the type of contractual event** that should occur in the future: a payment obligation, an automatic renewal of a contract, a periodic review of conditions etc. This ensures that no deadline slips out of control.

- Hand in hand with this technology, companies ensure the **regulatory** compliance of each contract with respect to the interests of the company and the laws in force. This type of software shields document processes by avoiding human errors in drafting, validation, compliance with deadlines and obligations.
- Thanks to CLM, the company's knowledge and information is adapted to new, more effective processes. For this purpose, **a complete CLM can be integrated with the company's software and databases.**
- **The CLM ensures knowledge of the company** and gets the best out of the information. Thanks to metadata or master data, the legal department can generate reports and identify key indicators, reuse valuable information from one document to another at the click of a button or classify requests to the department thanks to legal ticketing.
- This technology offers a key, a means for the legal team to be a cornerstone in the company's strategy and business. **It improves the company's relationship with its customers**, offering them new, more secure and efficient solution. Make the legal department into a key part of the business.



## ROI OF A CLM PLATFORM

In numerical and financial terms, as previously mentioned, CLM is a tool that not only contributes to the evolution of the management of the legal area, the following explains how it contributes to the benefit of the organisation:

9%

Companies annual earnings to be saved by proper contract management

91,5%

Cost savings per contract created

95%

Reduction in legal criticality

20x less

Time spent managing contract lifecycle



## A PROMISING FUTURE FOR THE IN-HOUSE LAWYER

The in-house lawyer has a unique profile for the company, made up of professional qualities and specific soft skills that make them essential. They have a vocation to help both their colleagues and the other areas, as well as high doses of work capacity that goes hand in hand with defending the company. That is why **they must empower themselves, make themselves heard, feel that they are agents of the company's strategy.**

Making a mentality change is the only way to get what they deserve, to position their area at the heart of the business. **An in-depth analysis of themselves, their surrounding departments and the company's corporate culture will enable in-house lawyers to take the necessary steps to improve the perception of their department.** A paradigm shift has arrived and the situation is ripe for this definitive positioning of the legal department as a business partner.

## About Feel Legal:

Feel Legal is a legal consultancy for companies and legal teams. **Its objective is to ensure that legal issues are naturally integrated into the strategy** and business of organisations in order to make them more sustainable.

To this end, it carries out consultancy projects in which the company **helps legal teams to be the strategic business partner they need** and to enjoy it, **empowering the team and each of its members in the process**. In parallel, the firm **works with organisations' management teams** to help them understand and integrate the strategic value of the legal function and their legal teams in their organisations.



The team is headed by **Yolanda González Silva, CEO of Feel Legal**. She has been a **legal consultant and corporate lawyer for more than 25 years**, working in multinationals in various sectors as well as in law firms. Yolanda has been **focused on law and strategic business consultancy, specialising in business law, compliance and intellectual property and new technologies law**, as well as university law.

Her extensive **experience as an in-house lawyer shapes her special way of accompanying legal and management teams** in redefining the legal function in organisations, as a strategic and business function, and to the optimisation of the performance and development of the area and of the legal team as an empowered human team and leader of this transformation.



## About Bigle Legal:

Bigle Legal is a cloud-based all-in-one Contract Lifecycle Management (CLM) software that automates the legal operations of companies, improving security and minimising the risk of legal contingencies. The platform is flexible, intuitive and provides full control over the entire document lifecycle.

The company is a pioneer in the field of no-code document automation, with a global presence, and its customers include large companies and large law firms. Bigle Legal's mission is to make Legal Operations easy.

To learn more about Bigle Legal, visit the website: [biglelegal.com](https://biglelegal.com)

For other enquiries, please contact [communication@biglelegal.com](mailto:communication@biglelegal.com)

### By using Bigle Legal, you contribute to saving natural resources



**323 million**  
Kg of wood



**7,1 billion**  
Litres of water



**725 million**  
Kg of CO<sup>2</sup>



**47 million**  
Kg of waste

