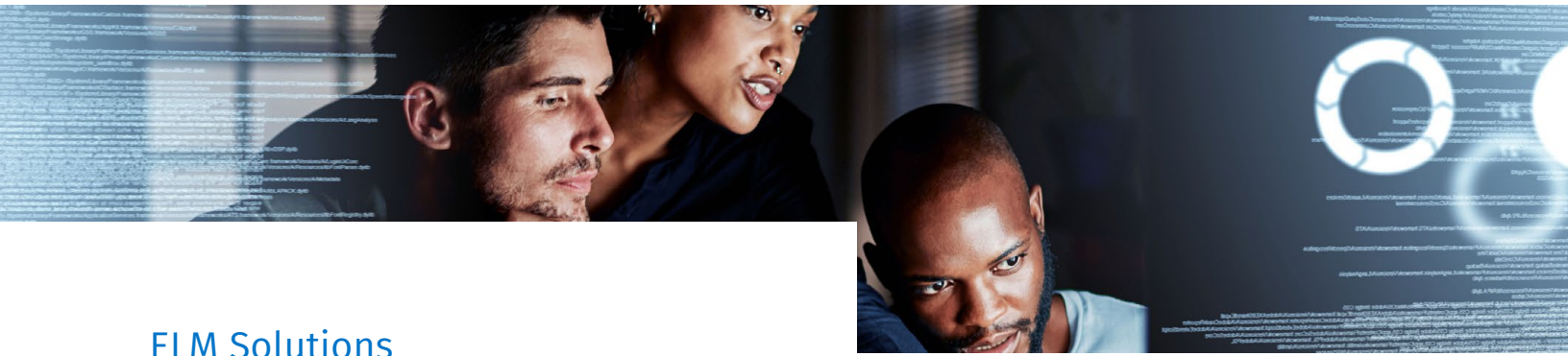




ELM Solutions

Checklist: Getting Started on Your Legal Ops Journey

In the current business and economic environment, many companies have increased focus on cost management, productivity, and risk mitigation. For legal departments, this often prompts an acceleration in plans to adopt legal operations technology. As you begin that journey, use our checklist to help ensure that the early steps you take set you on the right path for your department.

Establish your goals

- ☐ Create an advisory board made up of IT professionals, procurement managers, legal operations professionals, and other senior management representatives.
- ☐ Identify long- and short-term strategic objectives, along with longer-term financial and operational goals, and what tools might help your teams become more successful.
- ☐ Solicit feedback from users, including attorneys, on areas where they are hoping for improvement. Be sure you understand their goals in addition to the departmental-level objectives.

Assess your current tools

- ☐ Inventory your current technology portfolio and assess which tools are being used to their full potential. Gauge how the users of each tool feel about what they do best, what they lack, and their usability.
- ☐ Evaluate your processes with a critical eye, considering where there are gaps that present opportunities for increased efficiency
- ☐ Document the information you've collected so that you can refer back to it as you build out your technology roadmap, grounding your decisions in what you've learned.

Conduct the analysis

- ☐ Select a legal ops maturity model to compare your organization to the industry. This will help you understand how other organizations have approached their legal operations and what this means to their corresponding level of technology maturity.
- ☐ Reconvene the advisory board to begin the actual analysis. Use the selected model to analyze where your department fits in against the criteria and determine your maturity level.
- ☐ Consider any advice provided by the model on how to increase your level of maturity. Often, these models can help you determine which technology options can help you address your biggest pain points.

The steps above will prepare you to select and prioritize the right solutions to help meet your goals. For more information on planning technology investments that will support your legal operations needs, download our whitepaper [A Practical Guide to Creating a Legal Technology Roadmap](#).