



## **You Said Yes to Your First In-house Role – Now What?**

**Skills and Professional Development**



## Cheat Sheet

**Day 1.** Take the time to listen to your stakeholders before implementing processes.

**Day 30.** Establish relationships across the company to identify current workflows and where gaps might be.

**Day 60.** Reflect on what's working and what's not working, and how to move forward.

**Day 90 (and beyond).** Find ways to boost the company's goals with your knowledge of the legal department function.

## Day 1: Meet and listen to your stakeholders

While it can be tempting to try and jump straight into the “doing” work and fix everything on day one, this will probably only lead to disappointment. Building a legal function takes preparation and planning before implementing processes and improvements. You will likely have many pre-existing

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exposures and risks on day one, but it is important to remember the risks were there before you began and it's unrealistic to think they can be instantly fixed.

## **Making the most of your first few days**

So how do you make the most of your first day? Spend the day listening to your stakeholders. Start by mapping out:

- Who are your key stakeholders and what are their pain points?
- What are the expectations of the legal function (each stakeholder will likely have different expectations or needs)? Clarify how far your remit goes in terms of compliance, governance, and risk.
- What is the company's risk appetite?
- What is the culture of the company?
- How do the different levels of the company want you to communicate with them?
- Has the company previously engaged external partners (maybe a consulting lawyer)? If yes, schedule a conversation with them. It is likely they will have valuable insight into how the company runs and why work has been approached in a certain manner.
- Is there any work that you are taking over immediately, and if so, what are the deadlines?

Unless you are taking over a time sensitive operational process from day one, it can be beneficial to use those first few days to assess where the company is at and make a mental note about potential priority items to add to your major projects timeline. Your major projects timeline is a high-level plan of projects and improvements you want to roll out over the financial year. This won't come together on day one, but it is a good idea to start jotting down any thoughts.

## **Practical insight**

Don't make the mistake of jumping in too quickly on day one and feeling overwhelmed by everything that needs improvement. Understand that it's your role to educate your stakeholders on how long improvements will take. If you are taking over a time sensitive operational process (especially when it contributes directly to revenue), such as client contracts, that should be the priority. Once you have that under control, then you can begin your planning.

## **30 days: Plan and build relationships**

Over the next 30 days engage in as many conversations as possible with various business units for the purpose of promoting the legal function, learning about the company, and gathering your intel. When speaking with different business units, it is important not only to talk to the leaders/managers, but also the operational staff. This is for two reasons:

1. The operational staff will give you insights into the practicalities (and potential risks/exposures) of their role, and
2. Shaping the legal function as an approachable team is paramount in ensuring that issues and risks are raised immediately.

Throughout these conversations it is also important to identify what information/documentation is already in place and where it is stored. From there begin to identify your gaps; the gaps will help you shape your major projects timeline.

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## Practical insight

Introduce legal as a function to the broader business. You can do this creating “Legal 101”. This “Legal 101” session explains how legal can help the business achieve its goals and when to best loop legal in. It also puts a human face to a function that can have a bit of a reputation. To be the most effective partner to the business, legal needs to be approachable and the business won’t come to you unless they know and trust you.

## Legal advice

Practical advice will immediately show the benefits of hiring legal counsel. What this looks like will vary based on the stakeholders needs. If you have a busy CEO who likes direct to the point communication, a 15-page memo is the wrong choice. However, if they love detail, a thorough memo may be perfect. The easiest way to know is to ask, but if it is not clear, provide a short succinct answer first and add the detail as an attachment.

It is important to keep in mind that giving legal advice is only half the job, as you have also been hired to run a function. This means your advice needs to be on point, but as a leader you also need to be improving processes, contributing to strategic planning, understanding the business so that you can offer practical solutions to your advice, and planning workloads and future resource needs.

## Technology

To avoid your inbox becoming unbearable, consider putting in place a way to request legal work as soon as possible. If your company operates on Slack, it could be as simple as creating a legal request bot. You could also link your bot to a platform, such as Monday.com, so that your tasks are all in one place and the broader team can find updates without contacting you. There are many ways to do this, just look at what systems the company has in place already. In the beginning, it doesn’t need to be perfect, the aim is to declutter your inbox and provide updates to the stakeholders without needing to provide a response.

## 60 days: Assess

You have spent your first month trying to meet everyone, understand and sift through pre-existing processes and documents, and become accustomed to the company’s specific services or products. While the first month probably flew by, it is important to try and reflect what is and isn’t working. The best way to do that is to get feedback directly from the people you work with.

Keep track of the pain points the business has shared and start to tackle the low hanging fruit. The quicker you can automate standard processes and implement self-service, the quicker you can turn your mind to the more difficult tasks (this will be an ongoing process slowly automating and improving). Automation and self-service will also win you some ticks of approval with your stakeholders.

## Key tips to automation and self-service

- **Assess the current software already available in the business.** While it may not be perfect, it’s a short-term fix until you have the budget to get the built for purpose legal matter management program you dream about.

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- **Accept that it won't be perfect to begin with.** While it may not automate every step, if you can automate one step that will go a long way in establishing a business case for a more expensive platform (there are many not-so-pretty ways to hack contract automation - as an example if you're on G-Suite you could set up a G-Sheet to show the status of particular work items, allowing your stakeholders to check the status without needing to call or email).
  - **Map out the process to identify exactly what you need.** Once you begin the process of procuring a platform, it becomes apparent how many features are actually available. Knowing exactly what you need (and what the broader business needs) makes this task much easier.
  - **Create a knowledge base as you go.** Each time you get asked a question, note it down along with the answer. This will slowly build out a self-service knowledge base for those standard/frequently asked questions. This will also make training a resource easier when the time comes. If you are running on Slack, you can even build out a bot that will answer the question for you, based on your knowledge base you have compiled.

## 90 days (and beyond): Improve

If there's only one of you (most likely if you're the first in-house counsel), focusing on the outcomes that will give the business maximum value is a must. After two months in the business you should have a good understanding of what the business needs and wants. Finding the time to review your precedent templates and creating new ones for the recurring tasks can assist in boosting your efficiency. Try to make notes when you create a recurring task, as this can form the basis of a how-to manual when the time comes to hire a resource.

### Strategic direction

Pause for a moment to think about the strategic direction you want to take the legal team in. Reflect back on the points you began to map out from day one. Use those points as a basis to discuss with your CEO/reporting line the full remit of your function. Your goal should be to dedicate the majority of your time to strategic work and automate/self-serve/resource the business as usual tasks where possible.

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### Roadmaps

It can be helpful to create a roadmap of the legal function, which can encompass:

- Present state (what the function currently does)
- Future state (expanding the remit of the function)
- Timeline of major projects - include the financial year and consider expanding it to include future tasks with a rough timeline
- Resources needed to go from present state to future state (consider both headcount and software)
- Data that shows the legal department's value (such as a contract management system where a client complies 90 percent of the form and reduces risk)

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## Final thoughts

Building a perfect legal function certainly doesn't happen in 90 days and the steps outlined above are tasks that will be revisited and reviewed throughout the lifetime of the function.

- Identifying the company's pain points (for all of your stakeholders) is the starting point to creating trust and establishing your value.
- Accepting that the processes won't be perfect and putting in interim solutions is key to continual improvement of the function.
- Understanding the business, the risk appetite, and the industry is paramount to ensuring your time is spent on the right issues, rather than the technical legal problems that may have a negligible impact in reality.
- Connect with other sole or small legal counsel teams. There is a wealth of support in this space and having a group of colleagues who understand the practicalities of running a legal function alone or with limited resources is key to success (and sanity). ACC has a dedicated special interest group for sole legal counsel that we would highly recommend connecting with.

[Kate Sherburn](#)



Head of Legal

Who Gives a Crap

As the head of legal at Who Gives A Crap, a social enterprise that donates 50 percent of its profits to help build toilets for those in need, Kate Sherburn loves working for a company she's passionate about.

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Krystal Kovac is head of legal and compliance at Oncore. She has been building the legal and compliance function to assist Oncore's strategic growth plan. Legal process improvement is one of her passions and she enjoys seeing how those improvements can help not only the legal team but the broader business.



