



Pearson

# Legal Department Strategy & Operations: An Overview

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# Agenda

- Pearson & the Pearson Legal Department
- Strategy & Strategic Objectives
- Legal Operations
- Key Themes & Resources



- **Pearson**

- Who are we
  - *Founded in 1844*
  - *World's Learning Company with 30,000 employees across 70 countries*
  - *Products & Services used by millions of learners & teachers*
- Mission
  - *To help people make progress in their lives through learning*
- Values
  - *Brave, Decent, Imaginative, & Accountable*

- **Legal Department**

- People & Locations
  - *140 People across 20 offices worldwide*
- Mission
  - *To provide proactive, pragmatic legal advice that enables our business and protects our assets and reputation.*

# Strategy

- Legal Department Application
- Ensuring Alignment with Overall Corporate Strategy
- Setting Strategy & Strategic Objectives

# Legal Operations

- History & Evolution
- Tactical & Strategic Importance
- Functional Areas
- Examples

# Legal Operations

## History & Evolution

- Legal Operations has been around in an informal way for many years, mostly in the litigation arena – matter management, e-discovery, & outside counsel management.
- The 2008 recession resulted in a paradigm shift for in-house legal departments. They started keeping more work in-house, which increased the size and complexity of departments and the need to focus on operations.
- Over the last 5 years legal operations has become increasingly more important for the management of in-house legal departments resulting in formal legal ops teams and positions within these departments.
- In parallel, we've seen the creation and increasing importance of industry groups dedicated to the discipline of legal operations. Most notably CLOC (the Corporate Legal Operations Forum) and the ACC (Association of Corporate Counsel) Legal Operations division.

# Legal Operations

## Tactical & Strategic Importance

- **Drivers**

- Facilitates the achievement of the department's strategy & strategic objectives
- Optimizes the department's operations & drives innovation
- Allows for the department to operate like other business functions
- Allows attorneys to focus on practicing law while not expending effort on operational matters

- **Results**

- Increased department efficiency
- Increased capacity to deliver legal services
- Increased usage of data, analytics, metrics, & KPI's for decision making and departmental management
- Decreased costs due to less matters being sent to outside counsel and disintermediating work so it is done by the right resource at the right time

# Legal Operations

## Functional Areas

- Financial Management
- Outside Provider Management
- Metrics, Data, Analytics
- Technology
- Project & Process Management
- Strategic Planning
- Contract Management
- Litigation Support
- IP Management
- Internal Resource Management
- Change Management
- Knowledge Management

# Legal Operations

## Implementation

- Identify key operational areas that will support the department's strategic plan and objectives.
- Assess current organizational capabilities and level of expertise for these areas.
- Conduct a gap analysis of the department's current operational maturity in the identified key areas and desired future state.
- Develop a realistic plan, which includes resources needs, milestones, timelines, benefits, and risks, to achieve your desired future state.

# Key Themes

- Strategy & Legal Operations are key to the success of every legal department.
- A department's strategy & strategic objectives should be aligned to the company's strategy, include short and long-term strategic objectives, and initiatives that will result in the strategic objective being achieved.
- Legal Operations has significantly evolved over the last 5 years and is now a key discipline for legal departments which includes a number of functions that departments can implement in a manner that meets their needs.
- Legal Operations can drive efficiency, productivity, reduce cost, facilitate informed departmental decision making, and allow the department to be managed in a manner that is consistent with other business functions.



**Questions?**

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ALWAYS LEARNING

# Appendix 1

## Resources

- *The Little Guide to Pearson*  
(<https://www.pearson.com/content/dam/one-dot-com/one-dot-com/us/en/files/Little%20Guide%20to%20Pearson%20pdf%2020217.pdf>)
- *ACC Legal Operations Maturity Model* ([www.acc.org](http://www.acc.org))
- *CLOC Core Competency Legal Operations Reference Model*  
(<https://cloc.org>)