



# STAYING AHEAD OF THE CURVE

**The Importance of Strategic Planning in Legal Department Operations**

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# IMPORTANCE OF STRATEGIC PLANNING IN LEGAL DEPARTMENT OPERATIONS

- Visionary Value Based Leadership – “State of Dissatisfaction”
- Market Driven – “Alignment with Executive Direction”
- Customer Focused
- Customer Oriented
- Team Development

# PERCEPTION VS REALITY

Department Perception	Client Reality
We work efficiently	Not certain how to work with department or what to expect; Few internal department processes
We respond timely	Takes too long; Focused on risk elimination vs risk mitigation
We are proactive	Naysayers
We manage our budget	Spend too much; Unreliable forecasts
We know the law	Don't understand or know the business

# WHERE TO START?

- **Gather Data**

- ✓ Determine As-Is State
  - Survey
  - Interviews of Department Personnel/Executive Management
- ✓ Inventory of Work Performed
- ✓ Work Value Assessment – Risk/Value
- ✓ Benchmark Best Practices

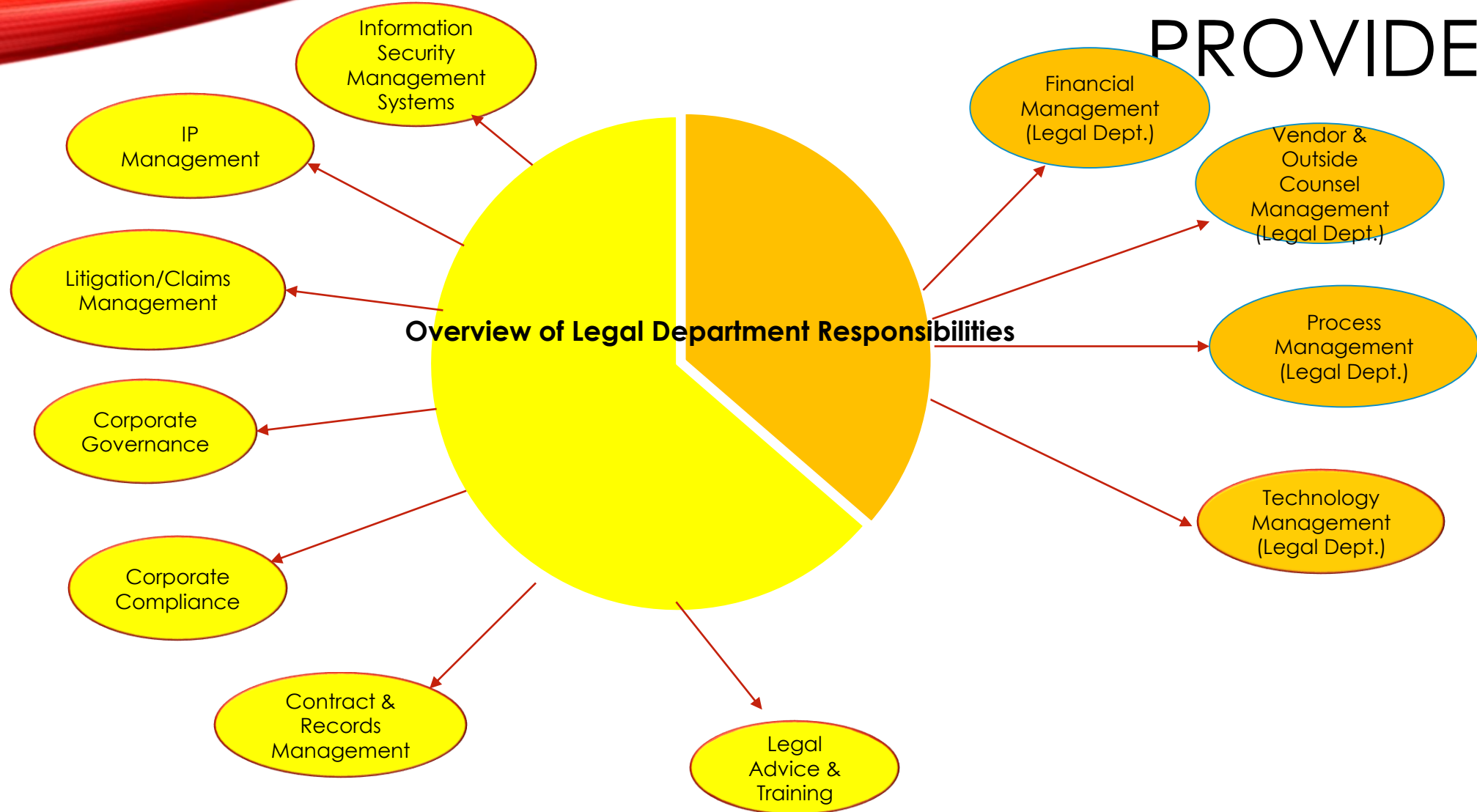
- **Accept the Results**

- **Commit to Value Based Road Map to Excellence**

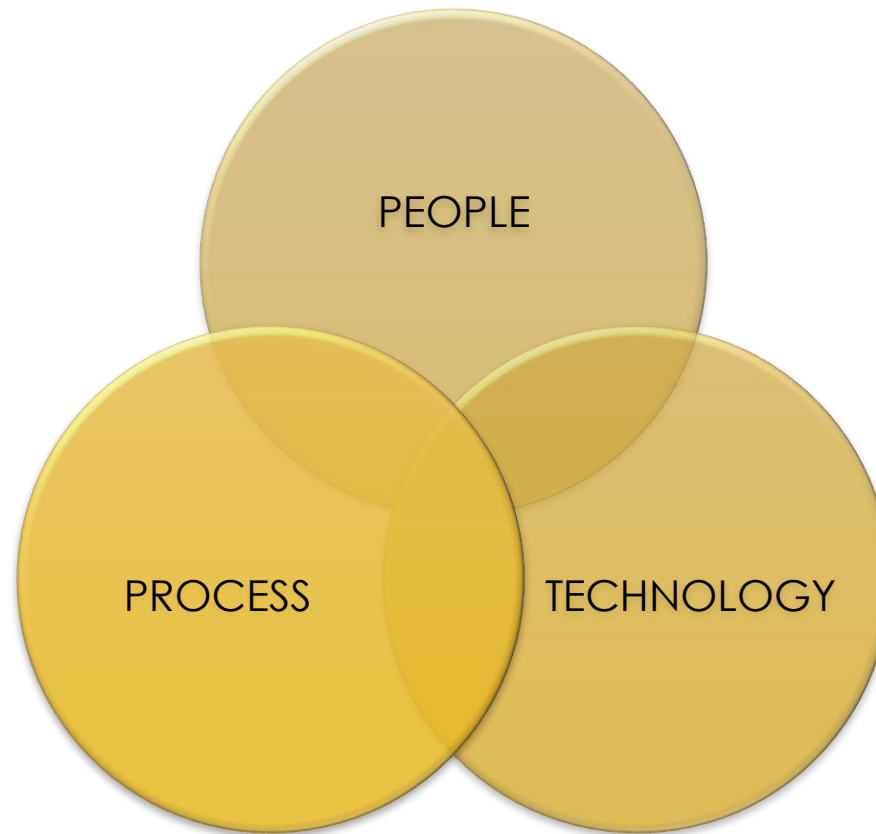
- ✓ Examples: Exemplary Customer Service; Operational Excellence; Profit Focus; Employee Enrichment

- **Select Initiatives Responsive to Results & Core Values**

# SAMPLE INVENTORY OF SERVICES PROVIDED



# COMPONENTS OF AN EFFECTIVE STRATEGIC PLAN





# PEOPLE

## **Review Survey & Work Value Assessment**

- Insource vs Outsource?
- Team vs. Lone Rangers?
- Right skills (hard/soft), collaborative, coachable?
- Willing to grow beyond comfort zone?
- Develop training plans and development opportunities?



# PROCESS

- **Review or create procedures for internal department operations**
  - ✓ Standardize procedures to create uniformity and consistency
  - ✓ Minimize “forum” shopping by internal customers
- **Review or create procedures for how internal customers seek and obtain legal department services**
  - ✓ Eliminate the guessing game
  - ✓ Increase transparency
- **Empower your internal customers**



# TECHNOLOGY

- **Technology can increase efficiency, capacity to serve, and help control legal spend.**
- **Consider technology that advances strategic goals**
  - ✓ Replaces low value & risk services
  - ✓ Advances high value services
- **Not all technology is the same, even if it promises to deliver the same services**
  - ✓ Pick technology that is a good fit for your team and company
  - ✓ Consider low-tech solutions such as SharePoint



# BARRIERS TO SUCCESS

- Lack of Project Management
- Poor Communication
- Poor Change Management
- Failure to adopt metrics to define what success looks like



## SUMMARY

**Fail to Plan, Plan to Fail**