



C L O C  
CORPORATE LEGAL OPERATIONS CONSORTIUM

## What does it mean to lead an initiative? What is involved? Is there a playbook?

YES! We're glad you asked!

Essentially, you act as the project manager – setting the timeframe for delivery, assembling a working group, and driving consensus to deliver a final recommended best practice or industry standard result that CLOC can stand behind and recommend. We've outlined the basic steps below. As always, feel free to reach out to [info@cloc.org](mailto:info@cloc.org) or any member of the Leadership Team for guidance or help.



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## Get ahead with CLOC Initiatives.

When you get experts from across the legal ecosystem working together to solve problems, almost anything is possible. That's the premise behind our CLOC Initiatives. These collaborative projects take on the biggest challenges of our industry, drawing in contributions from law firms, technology providers, law schools, and more. Access the best solutions and content and get involved in shaping the future of the legal industry.

[LEARN HOW TO START YOUR OWN INITIATIVE](#)



1. Clearly define the goal of the initiative. Because these can be lofty and broad, do try to narrow the scope or at least define it as much as possible upfront.

# CLOC Legal Project Management Initiative

## Project Charter - Scope of Work Agreement

### Matter Definition

The Corporate Legal Operations Consortium's (CLOC) Legal Project Management (LPM) Initiative will research and propose standards and resources for the development and implementation of LPM for CLOC ecosystem participants.

### Problem/Opportunity Statement

There is no legal industry standard for LPM business value, definitions, implementation or operational benchmarks. CLOC's LPM Initiative aims to address this gap.

### Stakeholder Analysis

STAKE	PARTIES
HIGH	Inside counsel, legal operations professionals, outside counsel
ELEVATED	Project management professionals, pricing professionals
GUARDED	Support staff
LOW	

### Objectives/Desired Outcomes

The CLOC LPM Initiative will develop the following content and guidelines:

- **What:** Define LPM in mutually acceptable terms for clients and lawyers
- **Why:** Provide a business case for adopting LPM in legal matters
- **How:** Develop templates and recommended implementation protocols for:
  - In-house management of legal matters
  - In-house management of outside counsel engagements to the mutual benefit of clients, service providers, and their shared clients

### Success Factors

This initiative will succeed where:

- In house counsel, legal operations counsel, outside lawyers and project management professionals can rely on agreed definitions and implementation protocols for LPM in their unique settings
- A strong business case for the implementation of LPM demonstrates its value to in house counsel and outside counsel alike
- A playbook of recommended templates, implementation guidelines and operational protocols for in house and outside counsel is developed and promulgated to the CLOC ecosystem

### Key Deliverables:

1. Mutually beneficial definition of the basic components of LPM
2. Business case for LPM adoption for in house and outside counsel
3. Playbook of templates, implementation guidelines and operational protocols of LPM

2. **Set the timeframe.** Create a high level project plan that simply includes dates of major milestones such as assembling your working group, gathering examples, forming a draft proposal, and delivering the final product.

## Key Milestones and Dates

STAKE	PARTIES
<b>SEPTEMBER 30, 2016</b>	Agreement on Project Charter
<b>OCTOBER 1, 2016</b>	Sharing of suggested templates and guidelines
<b>OCTOBER 24, 2016</b>	Assignment of Working Groups
<b>NOVEMBER 7, 2016</b>	First Scrum for Working Group Updates
<b>NOVEMBER 21, 2016</b>	Second Scrum for Working Group Updates
<b>DECEMBER 5, 2016</b>	Third Scrum for Working Group Updates
<b>DECEMBER 16, 2016</b>	Working Group Final Deliverables Reviewed
<b>DECEMBER 16, 2016</b>	Development of LPM definition
<b>DECEMBER 16, 2016</b>	Development of business cases for LPM
<b>DECEMBER 31, 2016</b>	Preliminary development of LPM implementation and operational protocols
<b>JANUARY 31, 2017</b>	Finalize Playbook of LPM recommendations

3. **Gather the troops.** Send a message out to CLOC members, your contacts in the industry, and your social media outlets to assemble a working group of volunteers. Aim to get as broad a representation of the industry as possible. Try to include legal departments of various sizes, geographies and industries as well as representatives from other members of the legal ecosystem (law firms, LPOs, technology providers, schools, etc.).
4. **Gather examples.** Ask the working group to share with you or send you any final work product or best practices that they have seen in their roles or elsewhere. Remember to let folks know not to share any pricing or related information that might violate antitrust guidelines.

The image shows a presentation slide titled "A Vision for the Future" from Cisco Legal. The slide content includes the Cisco logo, the title "A Vision for the Future", and the subtitle "Cisco Legal's Knowledge Management Strategy". Below this, the name "Jennifer McCarron" is listed along with her titles: "Chief Legal Knowledge Digitization Officer", "Cisco Legal", and "Sr. Tech Program Manager – KM, Compliance & Collab". A large "KM" watermark is visible in the background. On the left side, there is a navigation sidebar with a table of contents:

1	A Vision for the Future
2	Cisco
3	Agenda
4	KM Def & Mission

At the bottom of the slide, there is a small text block: "Intro LBS, LEGAL PROFESSION, Cisco 2012, Tomberg, 140'62, Tomberg legal tech, tools, processes, contracts onto Cisco, 2012 in a Lean & Agile PMO, a blend of PMO, building tech, tools, platforms, processes, ERP, DMS, CRM, Wordflow systems, Compliance tools, expertise tracking, etc."



## GUIDELINES FOR OUTSIDE COUNSEL

Electronic Arts Inc. ("EA") offers these terms and guidelines to assist outside counsel ("Counsel") provide high quality, cost-effective legal representation. Other terms, assuming they are consistent, may be included in a separate engagement letter from Counsel to EA. We hope these guidelines merely state the obvious and already are a part of your practice.

EA is an active client. We work best with Counsel who understand EA's legal and business objectives. Counsel should demonstrate that they care about the result as much as we do.

### I. Management

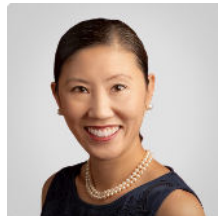
In our experience, we achieve the best results when we partner closely with Counsel as an active team member. To ensure EA's full participation, Counsel should:

- Actively manage workload to avoid inefficiencies;

5. **Create a proposal.** Once you have gathered a broad set of examples, you will want to comb through them to find commonalities and try to understand why there might be differences. Depending on the size of your working group, you may want to assemble a smaller group of less than 10 people who can help with the heavy lifting. This smaller group will ideally include individuals who have had success in this area or have some level of expertise. Again, broad industry representation is still advisable. With this smaller working group, gain a better understanding of the best practices based on the examples you have received and put forth a draft proposal for your initiative. This will be the longest and most work intensive phase of your project.
6. **Gather input and feedback.** Present the draft proposal to the larger working group and welcome thoughts and edits. Again, depending on the size and location of your working group members, this can take various formats from in person meetings to conference calls to commenting over email. This may also take several iterations and it will be impossible to get everyone to agree on everything, but make sure many perspectives are heard and considered.
7. **Present your final recommendation.** Get final sign off on the proposal or recommendation from a member of the CLOC Leadership Team.



**Connie Brenton**  
President & CEO



**Mary Shen O'Carroll**  
Head of the Legal Operations,  
Technology and Strategy team  
at Google



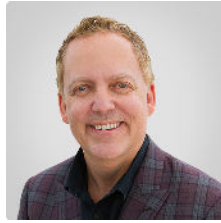
**Christine Coats**  
VP of Legal  
Operations, Oracle



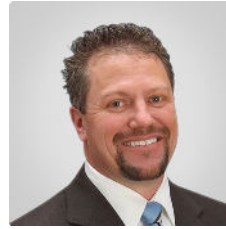
**Lisa Konie**  
Senior Director of Legal  
Operations, Adobe System



**Jeffrey Franke**  
Corporate Secretary



**Brian Hupp**  
Head of Legal Operations,  
Facebook



**Steven Harmon**  
Vice President and Deputy  
General Counsel

8. **Celebrate!** Be proud of your accomplishment and knowing that you have contributed to shaping of the future of the legal industry! CLOC will work with you to get the news out and to get other groups to endorse the initiative and spread the word.