



CLOC's Legal Innovation in Operations (“LIO”) Project

Thank you for choosing to participate in The LIO Project for 2020!

By submitting an entry, you are reinforcing your firm’s commitment to the continuing evolution of the global corporate legal ecosystem.

On behalf of CLOC’s Legal Department Members, we look forward to reviewing your entry. Best of luck!

What to submit?

An entry consists of two (2) separate parts as set forth below. We strongly recommend that you use the templates included as appendices herein (pages 3-6, below), and refer to the guidelines provided below for each part of your submission.

1. **Single-page narrative summary** for judging & media coverage with a maximum of 450 words. Font size should be between 10 and 12pt. Charts, graphs and illustrations are not permitted in this component. Submit as a PDF file.
2. **Short video** for judging *only* (will not be shared by CLOC outside of this Program), between 5 and 8 minutes in length. File size is limited to 100 megabytes.
 - a. This must be exclusive to this submission for The LIO Project and not be a previous video used anywhere else.
 - b. It must include commentary from at least one firm lawyer *and* one firm business professional of your choosing.
 - c. You may include animations, graphs/charts, and other visuals in your video.
 - d. Submit as a standard MP4 format file.
3. Each part of your two-part submission will be uploaded as a separate document, named using the following format: (i) for the Narrative Summary: “Narrative.[law firm name][submission title]” and (ii) for the Video: “Video.[law firm name][submission title].”
4. **All entries must be received in their entirety by midnight PT, on Friday April 17, 2020.** No exceptions will be made.

Guidelines and Tips for Your Submission:

- **Clear Communication**
Clear, concise entries are easier to read and understand and make a stronger impression on the jury. Making this as interesting as possible increases the chances of your entry being noticed.
- **Evidenced Results**
The jury is looking for evidence of what *results* were achieved, not why a particular approach was chosen. Prove conclusively the cause and effect between (i) service design and (ii) the results of your submission. Provide evidence of targets that were set in the overview of the project being met in the impact of your work.
- **Scale of Impact**
Provide an analysis of all effects, not just the primary results of the project. Often, a better customer experience also includes more satisfied employees and better financial results. However, keep in mind that all the effects must be substantiated.



- **Remember the audience**

Given the composition of the audience (CLOC members from global legal departments), it is advisable to include in your submission the voices of both the primary stakeholder(s) from the practice, and key businessperson(s) involved in bringing the specific innovation to the client(s).

Other Entry Criteria:

- **Entry Fee:** *There is no fee for entering The LIO Project.*
- **Limit of One Entry per Law Firm:** This applies irrespective of the size, global presence, number of offices or formal legal structure of your firm (e.g., Swiss verein).
- **Disqualification**
Entries submitted to The LIO Project must be true and comply with the rules. An entry that is found, subsequent to judging to have been based on false or fraudulent information may be disqualified and have its recognition withdrawn.
- **The Right of the Judging Panel**
The jury's decision is final. The jury has the right to reject entries that do not comply with the entry rules.
- **Confidential information**
Please do not include any confidential information in your entry that you do not wish to enter the public domain because CLOC is unable to guarantee that such information will not be published as set out below. Any inclusion of confidential information in an entry is at the entrant's sole risk and responsibility and in knowledge of CLOC's request not to do so.
- **Intellectual Property Rights / Approvals**
By submitting an entry to The LIO Project, each law firm represents that it has acquired all necessary approvals of the client and/or any involved third party (e.g., a consultant) for submitting the work, on behalf of themselves and their clients/consultants.
- **Rights Assigned to CLOC:** CLOC will have the right to publish the names of any or all of the three law firms selected as 2020 LIO Leaders, including details and descriptions of all entries (subject to any material expressly labeled as confidential by the applicable law firm). All entrants grant CLOC a perpetual, non-exclusive license to publish details and descriptions of entries as referred to, and also agree to participate in publicity reasonably requested by CLOC regarding all or any portion of their entry. CLOC acknowledges that copyright in all entries remains vested with the entrants.
- **No Liability:** CLOC cannot accept responsibility for, or liability arising from, entrants taking part in The LIO Project. To the fullest extent permissible by law, CLOC is exempted from liability for any loss, damage or claim arising as a result of your entry.

Still Have A Question?

- Make sure to review the materials previously provided to the entire Law Firm Community, available [here](#) (we recommend printing that out for reference).
- If you still have a question on any aspect of this submission process that we haven't answered herein, please feel free to drop an email to: LIO@CLOC.org, clearly stating your question and if applicable, providing an example for the basis of your question.
- *All questions must be received by 11:59pm PT, on Tuesday, April 14.*
- We will respond within one (1) business day of receipt of your question.



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APPENDIX: SUBMISSION TEMPLATE / GUIDELINES For the Narrative Summary

SUMMARY: Project Title

Organization Name:

Organization Size: Approx. number, broken down by number of lawyers and number of employees, all offices

Applicable Practice / Industry Group(s) or Service Team(s): e.g. Labor & Employment, IP, Immigration, Corporate, Financial Services, etc. (Please be as specific as possible such as specialty area or client segment).

Project Location: Physical locations where majority of activity took place (e.g., Client’s office in Palo Alto)

Project Length: Start date - end date

Voice of the client: Include how the voice of your client (“VOC”) impacted and influenced both your choice to invest in an innovative product or service, as well as the design of the product or service itself. Empathy is a key element of value-driven innovation. To the extent possible, it is recommended that the client with whom your team worked with, or focused on, be identified. Ideally, someone from the client will contribute to your submission either through attribution, a quote, or a direct statement as to the project’s impact and outcome. If the client name cannot be disclosed in the summary but can be in the video, please note that.

FORMAT: A maximum of 1 page - 450 words. This narrative summary is a condensed version of the submission video suitable for publishing in media. Importantly, the narrative summary should not contain any confidential information.

CONTENT

- **Introduce the project**
- **What was the context & practice focus?** Describe the state of the service(s) before the project, if applicable.
- **What was the challenge/opportunity?**
- **Team & Roles** - In addition to the involved lawyers, identify the roles / functions from the business side of the firm that contributed to the innovation, and what those contributions were.
- **Overview of the process used to find and shape the solution** – Describe any methodologies or best practices used. We are interested in both the solution design process *as well as* the change management process (i.e., getting people to actually use/adopt the new approach).



- **Outcomes** – Concisely explain and illustrate the outputs at each stage of the process, final deliverables/output of the project, and the current state.
- **Main Impact** – The impact statement should, to the best of your ability, include before-and-after quantitative and/or qualitative data and information. In the case of a project that has not yet been fully rolled out, specify the projected impact based on your pilot or early findings. You should explain the scale of potential impact.

<end of Narrative Summary Template>>



CLOC's Legal Innovation in Operations (“LIO”) Project

APPENDIX: SUBMISSION TEMPLATE / GUIDELINES For your Video Submission

INTRODUCTION: Project Title

Organization Name:

Organization Size: Approx. number of lawyers and employees

Practice Group or Service Team: e.g. Labor & Employment, IP, Immigration, Corporate, Real Estate (please be as specific as possible such as specialty area or client segment).

FORMAT: 5 to 8 minutes in total length.

- We do not expect, nor do we recommend, a slickly-produced video that has the potential to appear largely promotional or pitch-like. That said, be mindful of your use of colors (darker = better) and font sizes (large but not too large) for anything that you plan on displaying within the video itself.
- Be creative. Music is fine, but don't let it drown your message. We don't expect your voice-over or on-camera interviews to be professional grade, but don't speak in generalities or use buzz words (e.g., Big Data, Design Thinking) vaguely. It would be a shame for a truly revolutionary submission to be lost in misplaced terminology that impedes easy appreciation of same.
- Data driven charts and other illustrations are absolutely encouraged in your video, but they must be (i) easy to digest, and (ii) on-point to the problem your innovation has addressed for your client(s).
- Lastly, you are advised to include both lawyer and business person voices on your video.

CONTENT

The following timing breakdowns do not need to be followed exactly, but are a helpful guide.

Introduction (1 minute or so)

Who (organizational name and team members and roles)

Focus (what were you trying to address and why)

Outcomes and objectives (what evidence-based impact was made)

Process (2 minutes or so)

Concisely explain and illustrate the entire end-to-end process or project development. This can include but is not limited to, visuals or images of specific tools and methods.

- What type of research did you do and why?
- How many participants were involved in each stage of research?
- Explain how you gathered client and stakeholder insights
- Describe the specific tools, methods and processes
- Why were these specific tools and methods used?
- Outline key insights and how you used research findings to move the project forward



- Clarify how you developed and tested the solution concepts

Outputs (2 minutes or so)

Concisely explain and illustrate the outputs at each stage of the process, final deliverables to the client and the final user-facing outputs of the project. Basically, what were you creating or producing throughout the process that informed progress (e.g., learnings, wireframes, communications, playbooks, etc.)?

Impact (2 minutes or so)

The impact statement should, to the best of your ability, include before-and-after quantitative and/or qualitative data. In case of a methodology or project that has not yet been fully applied or rolled out, specify the projected impact based on your early work.

- Describe cause and effect related to the project
- What was the impact on the client's legal department, wider organization and/or other stakeholders?
- Did the impact(s) match initial objectives?

Conclusion (1 minute or so)

- Final thoughts and closing comments
- Highlight your main takeaway and impact from the project (i.e., What is the soundbite you want the viewer to remember?)