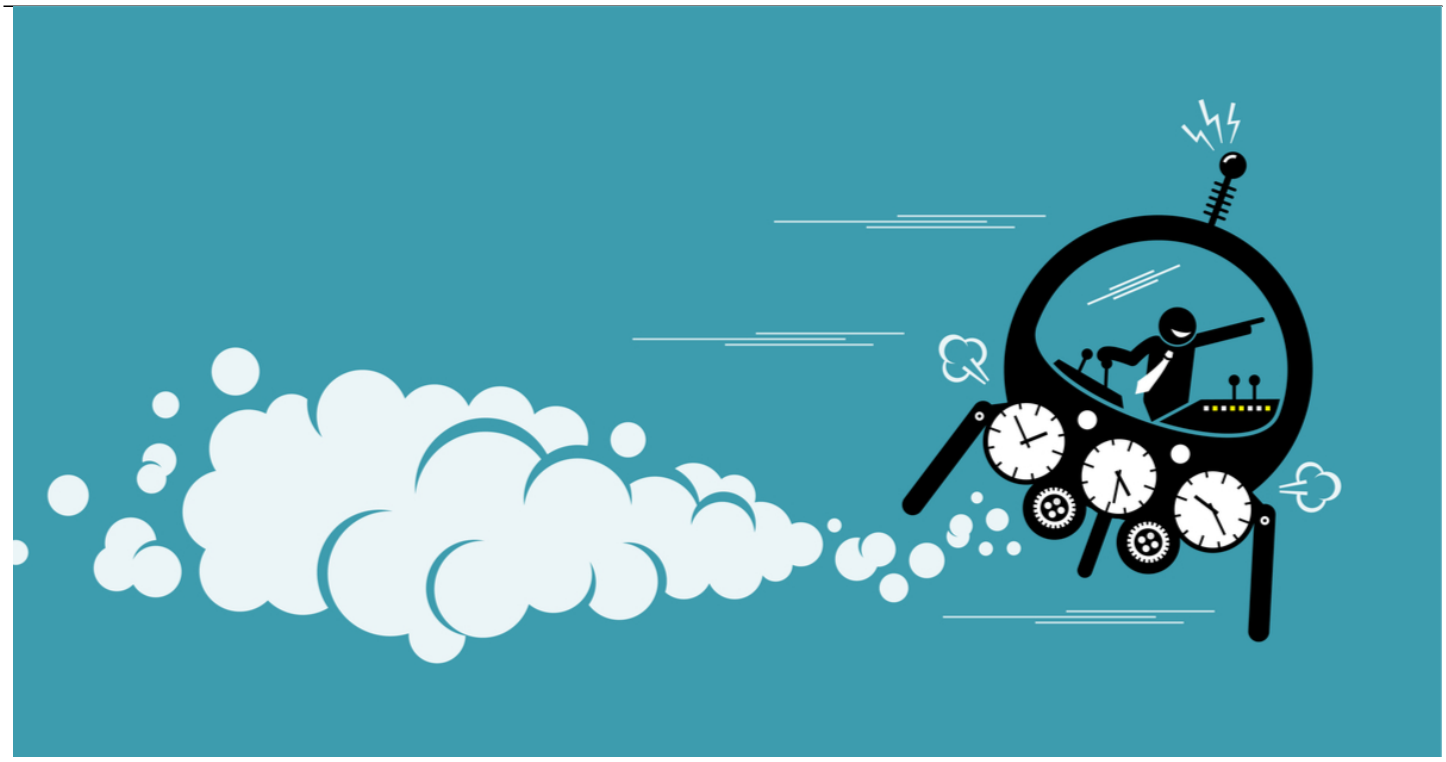
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Legal Ops Brief: If I Had Known a Year Ago…

Law Department Management



If only I had known a year ago…

Thinking back to last year, as we edged into the COVID-19 pandemic, I had no idea there would be forced changes to my legal ops world.

If I had known we would be working from home…

The first and most obvious change was that legal professionals all began working from home.

Time we usually dedicated to preparing for the day and commuting to the office was transformed into time available for reading, responding to emails, or jumping on calls, all while at your home desk.

We all gained new respect for working parents as they prioritized their families while managing daily work and output. Many in the legal industry had to adjust their attitudes toward working from home, while for others, it came naturally.

A year ago, I couldn't have imagined the advantages of working completely from home, nor that they would prove to be a gamechanger on how I prepared and managed my operations.

If I had known we would go completely digital…

Everything became completely electronic. Document management, filing structures, and signature management all needed to be processed by electronic means. Being away from an office nullified physical activities such as filing paper in a cabinet, getting a wet signature for a contract, or making copies of documents to send out. To continue activities that were typically done in person, we had to

adapt to complete digital interfacing, which unexpectedly amplified efficiency in operations. For example:

- Digital signatures through DocuSign or Adobe were accepted as the best way to manage and could be done in a fraction of the time it took to complete physically.
- Usage of SharePoint, Teams, Box, iManage, NetDocuments, or other document management platforms forced more organization of files and easier access for whomever needed them.
- Legal ops and records management prioritized projects to digitalize hard copy documents so older documents could be found electronically.
- Notarization via electronic means became popular and sponsored innovation from service providers to offer such services to clients in remote areas.
- Legal ops and records managers showed strategic thinking when preparing document organization management plans and organizing paper centric materials into electronic format.

If I had known a year ago that I would be in a place to reinvent the way documents were managed electronically, I would have begun searching and planning sooner to see how much further I could go.

If I had known I would have to “privilege-proof” my house…

Despite having the office in your own house, rules of the office carried over. Simply put, Siri, Google, and Alexa could not work in my office at home. To safeguard confidentiality and privilege information, voice activated devices in my home had to be turned off, otherwise it would be recorded and stored on a third-party server.

The comforts of having voice activated in-home service available to play music, order groceries, or call a friend were now a potential threat for lawyers working from home. This situation does not preclude the pandemic; however, working from home does increase the chance of it happening. Legal ops is now making sure your home is a “safe zone” to conduct privilege and confidential conversations by setting down guidelines for work purposes.

Had I known a year ago I would have to tell my in-house lawyers to turn off their voice-activated devices, I would have practiced my poker face and built nerves of steel.

If I had known video conferencing would replace in-person meetings…

Zoom, Teams, GoTo Meet, and WebEx replaced in-person meetings. Video conferencing turned into the new “in-person” way of socializing and opened efficiencies and challenges for legal ops, especially in confidentiality integrity. Video conferencing technology is efficient in control and management of information content that could be used for legal or non-legal purposes, but it comes with the challenge of keeping personal information and storing it legally in the face of privacy challenges and disclosure of information — especially when communicating with citizens across the globe.

Had I known a year ago I would be using Zoom to conduct “face-to-face” meetings, I would have made sure my communication plans and guidelines were ready.

As I think about things I wish I had known a year ago, it’s clear more aspects of change are still happening. I think about what bigger picture impacts were really going on and how my operation plans impact what I support in the legal industry. I ask myself how I can be more adaptive, and I

encourage my fellow ACC members to think about what you wish you had known a year ago and what you think the next year will bring. Bottom line: Always try to prepare, even for the things you can’t prepare for.

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