

# LINK

LINK-*Up*

December 3, 2024



# UpLevel Value Exercise

Workshop Explanation & Homework

December 2024

**UpLevel Ops**

Take Legal to the Next Level

## Value Exercise Overview

- Ideally, Legal Department staff have the bandwidth to work on the most strategic, high-impact projects and the confidence to smartly delegate, outsource, eliminate, or automate lower-impact items
  - To identify team members' highest and best use in each function group and/or personnel level, UpLevel will facilitate a point-in-time 4-square workload assessment exercise as part of the upcoming Team offsite
  - This framework allows teams to:
    - ✓ Identify the various types of work they do and categorize their tasks into a grid, with Urgent vs. Not Urgent on one axis and Impactful vs. Not Impactful on the other
    - ✓ Increase scalability by aligning and prioritizing high-value tasks and establishing plans to automate or eliminate lower-value tasks or distracting "noise"
    - ✓ Create bandwidth for impactful but low urgency work (like a process change, training or playbook) with no set deadline
  - Overall workshop goals: Gain department-wide visibility and alignment on Team workload priorities and solutions to increase team impact
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- Each Team member will complete their own information for the 4-box exercise (see "Homework" slide)
  - Team members send completed homework to UpLevel for analysis

Urgency

Impact

3

### High Urgency, Low Impact

- Fixed deadline, requires response
- Often takes up significant time because of external pressure to complete

Tasks that must get done but not necessarily by you

1

### High Urgency, High Impact

- High value or high risk
- Often involves cross-functional teams working toward shared goals and timelines
- Fixed deadlines, like EOQ

Tasks with deadlines & consequences

4

### Low Urgency, Low Impact

- Work that is questionable whether you should be doing at all, but may show up as a legacy requirement
- No real urgency to complete

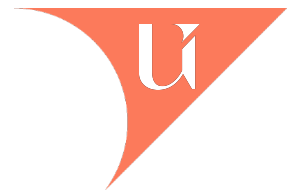
Repeatable, sometimes unnecessary tasks

2

### Low Urgency, High Impact

- Strategic, but often ignored or delayed because no fixed deadline
- Increases scalability, mitigates risk

Tasks with unclear deadlines that are impactful



## 4-Box Homework

- Each Team member should complete their own four-square exercise in which they list and categorize the types of tasks and projects that consume their time
- These lists do not need to be overly specific but rather higher-level groupings of work and related operational tasks (e.g., redlining sales contracts, processing NDAs, document review, managing litigation hold, responding to Marketing questions, attending team meetings, emailing clients about project status, searching for documents, M&A support or due diligence, law firm invoice review, updating Teams, template management, etc.)
- Each task should be assigned to a quadrant: (1) high urgency, high impact, (2) low urgency, high impact, (3) high urgency, low impact, or (4) low urgency, low impact. Note: a task may be high impact because it involves a high dollar value, or potentially significant risk, but it may also be high impact because it strongly promotes the company values or team mission – such as building relationships with key internal clients
- On subsequent slides, there is an example 4-square homework response and a blank slide template to fill out. Team members are welcome to use Word or Excel to compile their task lists/categories instead of the PowerPoint template
- **It should take no more than 45-60 minutes to complete this homework.** And to clarify: this information will not be used to judge how you or your team spend your time. Rather, this an opportunity to collectively brainstorm ways to increase the entire team's impact and job satisfaction. We welcome any additional commentary/notations on areas where you would like to spend more time if bandwidth allowed or comments on potential improvement solutions
- Completed worksheets should be sent back to me ([stephanie.corey@uplevelops.com](mailto:stephanie.corey@uplevelops.com)) by **Friday, October 18th**. You may find it helpful to compile your tasks early in the week, then spend a few days comparing how you spend your time to the tasks you have included to make sure it is complete

## **1 High Urgency, High Impact – Examples from 4 Box Value Exercise**

### **Commercial Transactions:**

- High volume of contract drafting, review, negotiation, and approvals
- Contract administration (assigning NDAs, working with CLM tool, eSignature prep)

### **Ad Hoc Queries:**

- FAQs from internal departments and partners on legal and strategic issues

## **1 High Urgency, High Impact – Potential Solutions**

### **Commercial Transactions**

- Implement a robust CLM system for end-to-end contract processing
- Utilize GAI tools for drafting and extraction will reduce turnaround time (GAI for redlining will soon be an option)
- Develop enablement materials and fallback provisions & automate where possible for routine negotiations to create additional time for legal to get involved with more novel issues

### **Ad Hoc Queries:**

- Be sure documentation is up-to-date (policies, procedures & contracting guidelines) and stored centrally
- Build a knowledge base using custom GPTs to answer FAQs

## 2 Low Urgency, High Impact – Example from 4 Box Value Exercise

### Process Improvement and System Optimization:

- Frequent process evaluations, testing of new systems (e.g., CLM System, DMS System), and refining existing workflows

## 2 Low Urgency, High Impact – Potential Solutions

### Process Improvement and System Optimization:

- Establish a dedicated process improvement cycle to periodically assess and optimize workflows, leveraging analytics to measure impact and identify bottlenecks

### **3 High Urgency, Low Impact – Example from 4 Box Exercise**

#### **Routine Approvals and Documentation:**

- Common tasks include approving invoices, routing documents, issuing docs through eSignature, and contract terminations
- Processing NDAs

### **3 High Urgency, Low Impact – Potential Solutions**

#### **Routine Approvals and Documentation:**

- Set up automation for document approvals and routing in CLM tool
- Automate NDAs in CLM tool
- Standardize termination procedures with templates and workflows to reduce manual effort

## **4 Low Urgency, Low Impact – Example from 4 Box Value Exercise**

### **Recurring Meetings and Updates with Limited Value:**

- Routine meetings (e.g., weekly/quarterly syncs) and repetitive updates with undefined strategic impact

## **4 Low Urgency, Low Impact – Potential Solutions**

### **Recurring Meetings and Updates with Limited Value:**

- Conduct a meeting audit to determine if these syncs can be reduced in frequency or replaced with automated status updates, like dashboards or summary emails, or AI meeting notetakers





# ***Breakout Sessions***

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