



Streamline AI Guide

Running a Highly Efficient Legal Team

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The common challenges facing in-house legal teams

Now more than ever, businesses need agility and speed to thrive in an intensively competitive market. A company's swift response to opportunities often depends on seamless collaboration between its in-house legal teams and business stakeholders. While legal teams are entrusted with delivering efficient services to these stakeholders, many find it challenging to match the pace of business demands.

In this guide, we'll explore actionable strategies and tools that empower in-house legal teams to work efficiently, accelerate tasks, and align more strategically with the business. You'll learn how to build a legal team equipped with the right talent, technology, and processes to drive greater efficiency and value. With the insights in this guide, you can transform legal into a proactive force for business growth and competitive edge.

Let's start by diving into the top three challenges in-house legal teams face today:

Challenge #1: Legal team burnout

In-house legal departments are grappling with increased workloads with the same or reduced headcount and resources, which is leading to compounding problems. A recent report highlighted that 70% of legal departments are seeing a surge in the volume of legal tasks. However, many are tackling this increased workload internally due to budget constraints rather than hiring outside counsel.¹ This pressure to deliver quality legal services cost-effectively is escalating stress and burnout levels. Only 42% of in-house counsel are somewhat satisfied or less with their current position and only 16% are completely satisfied with their current position, and more than 80% are considering changing jobs within the next two years.²

Challenge #2: Ineffective processes and legacy systems

Many in-house legal teams still rely on manual processes and legacy systems that hamper productivity and make it difficult to work efficiently. The proliferation of scattered documents, e-mails, and files in disconnected tools slows down work and makes finding information painstaking. These outdated tools and processes prevent legal teams from keeping pace with the demands of the business. To enable greater

¹ Thomson Reuters Institute 2023 Legal Department Operations Index

² Axiom's 2022 In-House Counsel Survey Report

agility and speed, in-house legal teams should begin adopting technology such as automation and cloud solutions already embraced by their business counterparts. Digitizing workflows and processes through software can help streamline legal work while providing actionable insights through analytics. According to a survey of law departments by Deloitte, 36% of legal departments plan to evaluate and implement workflow or business process automation tools in the next 12 months.³ With the right digital tools, legal teams can work smarter, move faster, and partner more strategically with the business.

Challenge #3: Positioning legal as a proactive problem solver

Despite the crucial role legal teams play in almost every key initiative within a company — from ensuring marketing compliance to drafting and reviewing sales agreements and vendor contracts — the legal department's efforts often lack company-wide visibility. This legal black box hinders business stakeholders from recognizing the outsized role that the legal department plays in reducing risk and paving the way for the company's success. To do so, in-house legal departments need more effective collaboration, communication, and alignment with business stakeholders to shift the perception of the department from a reactive, back office function to that of a proactive and strategic problem-solving partner.

Setting up the foundations for a high-performing legal department

Transforming the team into a high-performing legal department begins with setting a solid foundation. It's about fine-tuning team processes to make the legal workflows seamless, equipping your team with the right technology to optimize legal delivery, and creating a central hub where knowledge isn't just stored but shared and enriched. Moreover, tracking and showcasing the right metrics is crucial to measuring performance and showcasing the legal department's outsized impact. Through a well-structured approach, you can empower your legal team to operate effectively and efficiently, ready to play a pivotal role in your company's success.

³ Deloitte's 15th Annual Law Department Operations Survey, December 2022

Implement efficient team processes

For in-house legal teams striving to achieve optimal operational efficiency, identifying opportunities for process optimization is the first step. Here's a structured approach to unearth and address these bottlenecks and points of friction:

Process mapping. Begin with a detailed mapping of the existing intake, review, and approval processes. Visual representations can be particularly helpful in understanding the flow of tasks and spotting where delays occur.

Data collection. Collect data on how long each step of the process takes. Utilize legal technology tools that offer analytics and performance metrics to gather accurate data on time spent on each step of the process.

Engage with team members and business stakeholders. Engage with team members and cross-functional stakeholders to understand their experiences and gather insights on where they feel hold-ups occur. They are on the front lines and can provide valuable input on procedural snags. Engaging these business stakeholders in this identification process also builds trust, breaks down the legal black box, and nurtures better long-term relationships by fostering a sense of collective ownership and collaboration.

Analyze findings. Analyze the collected data and feedback to identify common bottlenecks. Look for steps that consistently take longer than others or hold up subsequent steps. Compare your processes with industry benchmarks, if available, or with similar processes within other departments or organizations.

Continuously monitor. Establish a system for continuous monitoring and feedback to stay abreast of how process improvements are affecting throughput and to identify new bottlenecks as they arise. Keep in mind that what may work for your organization currently may not work for the next stage of growth. It's important to revisit processes from time to time to make tweaks as the company scales.

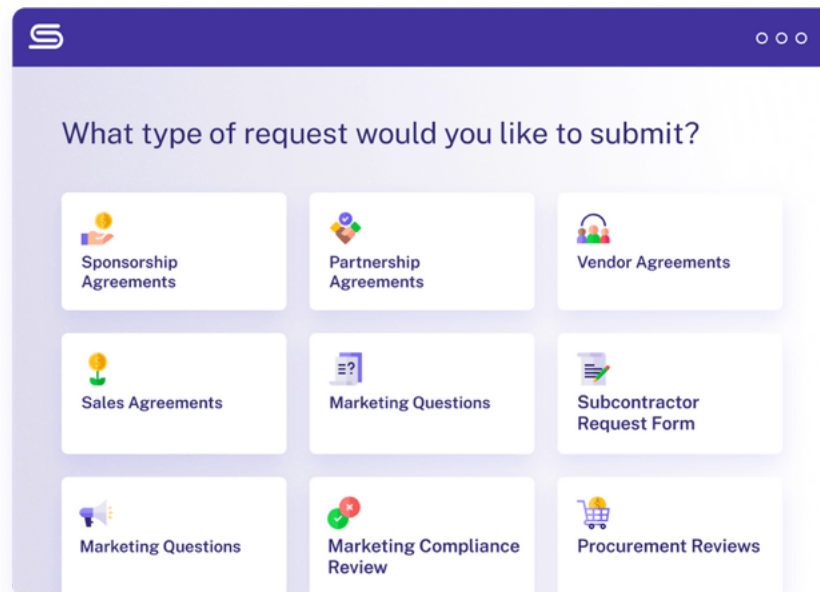
For example, through this friction audit process, you might discover that the existing vendor process requires every contract to go through a senior counsel for final review before approval. Due to the senior counsel's busy schedule, this step often becomes a bottleneck, causing significant delays in contract approvals, which then

impacts the ability of business teams to do their work. The friction becomes apparent as other steps in the process, such as Finance and Procurement review, are completed relatively quickly, but the final approval is held up awaiting the senior counsel's review.

Addressing bottlenecks like this example can have multiple approaches. Possible solutions could include setting dollar amount thresholds before requiring senior counsel review, implementing automation to streamline review and approval routing, and/or providing additional training to other team members to handle final reviews. By identifying and addressing bottlenecks, legal teams can significantly enhance their efficiency, ensuring timely and effective legal service delivery.

Empower the team with the tools to optimize legal delivery

Setting a goal of efficiency is easier said than done. To address the rising legal request volume and enhance efficiency, legal department leaders must equip their teams with the right tools to support the day-to-day work. The growth and evolution of the legal tech stack now means that there are cutting-edge software solutions that can reduce manual, administrative tasks and free up time for more satisfying and high-impact legal work. Here are some technology solutions legal teams can lean on to scale output:



- **Intake, triage, and workflow automation software.** Legal requests often come through multiple channels — email, Slack, Salesforce, and more — leading to a scattered, inconsistent intake process and substantial time spent on manual triage and information. Intake, triage, and workflow automation software like [Streamline AI](#) can centralize these requests into a single mission control and automatically route them to the right contacts for review and approval. With everything is captured from the intake step on, legal teams have access to valuable performance metrics, better team workload visibility, and more efficient delivery of legal services.
- **Contract lifecycle management (CLM) software:** CLM software enables legal teams to oversee the contracts from start to finish. These systems automate generation, reduce manual errors, and ensure contracts adhere to business standards, improving efficiency and compliance.
- **E-signature software:** E-signature software delivers faster, secure contract execution through digital signatures. Key benefits include faster cycle times for completing contracts, enhanced audit trail and security protections, and an improved signing experience for clients and partners.
- **E-billing solutions:** E-billing software is designed to manage and monitor outside counsel legal expenses resulting in a simplified billing process, better transparency through tracking, and minimized billing errors.
- **Knowledge management tools:** Knowledge management tools enable legal teams to create, manage, and share valuable legal wikis and playbooks, ensuring that valuable insights, best practices, and case studies are accessible to all team members.

When equipping your team with new tools, focus first on solving the most pressing bottlenecks first. Prioritize must-haves over the nice-to-haves, and make sure any solutions considered integrate well with existing systems and workflows. This helps ensure efficient data flow and minimize the need for manual data entry, which saves time and significantly reduces the risk of human error.

Keep in mind that the right software solutions can transform efficiency, but they also must have the internal support and resources to make sure they're set up for success. Resist the temptation to onboard new technologies without clear objectives and support. With a clear tool strategy, you can build a tech stack that empowers your legal team to work smarter.

When considering the cost, look at more than just the initial cost, but also at the ongoing cost of support and maintenance. As business needs evolve, how quickly can the tools adapt to new processes and needs? Look for no-code or low-code software solutions that make it possible for the legal team to quickly make changes and updates to forms, processes, and workflows without the need for an external consultant.

Streamline AI case study



Impact at a glance

- Reduced time spent on each legal ticket by almost 60%
- Improved visibility and trust with Deal Desk and Sales
- Access to a central system to track and manage all legal requests

Branch Metrics is a deep linking and attribution platform that helps optimize mobile user acquisition and engagement efforts. After implementing Streamline AI, Branch Metrics reduced their time on each legal ticket from 2 days to 1.7 days. This improved Deal Desk and sales team efficiency and provided the executive team with real-time insights, fostering better collaboration and positioning the company for future success.

[Read their story](#)

Centralize knowledge management

As legal teams scale and evolve, it's only natural that knowledge sharing can become more challenging. Establishing a robust knowledge management system reduces the time spent searching for information and enhances the overall efficiency of the team. It accelerates future team members' ramp-up time, helps manage risk and adherence to company policy, and ensures consistency and continuity for the entire legal team.

Consider building the following resources and playbooks:

- Standardized templates for frequent legal documents (e.g., NDAs and sales agreements).

- Comprehensive checklists and guidelines for legal processes, reviews, and contract types, covering steps, approvals, risk analysis, negotiation strategies, and ethical considerations.
- Repository of previous contracts and briefs for reference.
- Guidance on records management, retention, and legal approval authority.
- Crisis response strategies.
- Financial guidelines including budgeting, billing, and managing external counsel.
- Overview of legal department objectives, KPIs, and strategic plans.

Knowledge management tools don't have to be limited to legal team use. If you notice that business stakeholders are asking the same questions repeatedly, it may be time to build self-help resources to empower stakeholders to find answers on their own to reduce the workload on your team. Document frequently asked questions and their respective answers within a knowledge-sharing platform and include a link to the resource directly on your intake request forms to ensure accessibility.

Identify and showcase the right metrics

Navigating by instinct alone no longer suffices in today's business world. More and more companies are becoming data-driven and focusing on the adoption of measurable metrics, or Key Performance Indicators (KPIs), to demonstrate success and value. Setting clear KPIs for the legal department can guide legal towards achieving specific objectives by offering a clear focus and direction. They provide insights into the team's performance and areas for improvement and help legal teams allocate resources optimally. A well-structured KPI can act as an early alert system for potential risks, enabling legal departments to address issues proactively. When shared with business stakeholders, these KPIs can showcase the legal department's value and impact on the company and build trust and transparency.



Establishing KPIs can be a hurdle for legal departments given the nature of their work, which is frequently reactive and tied to large-scale company initiatives such as GDPR compliance or new product releases. Nevertheless, some overall KPIs applicable to in-house legal teams should include:

- Request volume (overall, by business team, by type, by team member)
- Average time for first response (overall, by type, by team member)
- Average time under legal review (overall, by type, by team member)
- Average time different approval teams take to handle approvals
- Legal team engagement: How happy are the members of the team?
- Contract quality, as graded by acceptable risk criteria created by Legal and the business
- Customer satisfaction: How satisfied are business stakeholders with the legal department?

Manual tracking of legal KPIs can be time-consuming and error-prone, often requiring meticulous data entry and management. Moreover, the manual tracking leaves room for inaccuracies that could skew a proper understanding of the department's performance and opportunities for optimization. By capturing time at each step of the legal request process from the start, beginning with intake, legal software solutions like Streamline AI can automate data collection and reporting,



ensuring accuracy and real-time insights. This frees up in-house legal teams to focus more on their core responsibilities while still being able to monitor and showcase their department's performance and value to the organization.

Elevate your legal team

Today, it's more important than ever for legal leaders to position their teams for sustainable, long-term success. As the market conditions change and the pressure to be more efficient grows, it's up to decision-makers to funnel resources into the right tools and processes so their teams can deliver on team and company objectives.

Streamline AI is an intelligent intake, triage, and workflow automation platform purpose-built for in-house legal teams. Co-founded by a former in-house lawyer, Streamline AI consolidates all types of legal requests into one command center and automates review and approval routing. By reducing the amount of administrative work, legal teams can reclaim their bandwidth and channel their efforts toward being proactive and strategic partners to the business.

Modernizing your legal processes isn't just about saving money — it empowers the business to drive more revenue. So if you're a legal leader looking to bring delivery of in-house legal services into the future, start by getting in touch with Streamline AI.

Schedule a demo