

LEGAL PROCUREMENT IN BRIEF

Legal Procurement 101: Getting started

Sourcing legal services can be a challenge, but knowing what has worked for others can help you avoid some common mistakes. Danny Ertel of Vantage Partners shares his tips:

- Reach out. Start building relationships with your colleagues in the legal department and strive to become a real partner. Do not “do” procurement “to” them, but seek collaboration.
- Listen and understand. Learn how your colleagues in the legal department currently source legal services and how they manage supplier relationships. How do they approach “make or buy” decisions? Understand how they switch between their roles as “doers” of legal services/managing internal resources and managers of external resources/outside counsel. What do they think works well, what do they see as areas for improvement? Take the time to find out.
- Educate yourself. Every area has its lingo, commonly used terms, and abbreviations. Learn about basic legal concepts and how to speak “legalese.” Subscribe to legal publications (online and/or in print) and attend legal seminars or webinars.
- Offer your help. Find out which issues keep your colleagues in Legal up at night. Is there anything that you can address that is outside their primary area of expertise but needs to be done? For example, getting visibility into spend data, spend drivers, data security, project management of outside counsel, matter management systems, eBilling, benchmarking data or rate cards etc. Understand how your colleagues get measured and strive to make their life easier.
- Gain credibility. Start with a “pilot” project –ideally an ancillary legal service (such as court reporting, due diligence)– and showcase how you can add value. Present the business case and make your colleagues in the legal department look good: help them be seen as good stewards of the company’s money. Having an executive champion –the general counsel, CFO, COO or CEO- will make or break your success in this category.



To improve your chances to successfully source legal spend, start slow, strive to be involved early on, deliver value and - pick your battles!