



Legal Operations & Contract Lifecycle Management

Presented by the Franchise & Distribution Law Section of the Georgia Bar

October 8, 2024

Panelists:

Dana Bybee, Bradley Arant Boult Cummings LLP, Director of Practice Solutions

Eric D. Greenberg, Cox Media Group, General Counsel

Harrison Underwood, Brickell Global Legal, Founding Partner

Moderator: Amy Andrews, GoTo Foods, VP & Associate General Counsel



State Bar
of Georgia

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Panelist Biographies

Dana Bybee



Dana Bybee is the Director of Practice Solutions at Bradley Arant Boult Cummings LLP, where she focuses on finding the right technologies to meet the business needs of legal professionals. Dana has over twelve years of experience in legal technology, working both in-house at law firms and as a consultant working with a broad range of law firms and corporate legal departments. Throughout her career, Dana has focused on technology selection, design and implementation, technology adoption, change management, and product management. She is most passionate about solving problems with technology solutions.

Dana received her Bachelor of Science in Business Administration from Butler University and her Master of Professional Studies from Middle Tennessee State University. She also holds a certification in NetDocuments implementation and has completed educational coursework in Project Management, Product Management, and UX Design. Dana is based in Nashville, TN.

Eric Greenberg



Eric Dodson Greenberg is Executive Vice President, General Counsel and Corporate Secretary of Cox Media Group, a multi-platform media company based in Atlanta that serves major U.S. media markets. CMG is a portfolio company of the private equity firm, Apollo Global Management. Eric is a member of the company's executive leadership team, and leads the company's M&A initiatives, coordinates its ESG efforts, oversees litigation and commercial negotiations, and works closely with his CEO and Apollo on strategic planning. Before joining Cox, Eric was a partner in private practice, where he was ranked by Chambers USA as a leading lawyer in both its media-and-entertainment and communications categories, and by the Legal 500, who inducted

Eric into its Hall of Fame for lawyers at the pinnacle of the profession. In 2016, Eric was a winner of the Financial Times Innovative Lawyers Award. As an inhouse leader, Eric has been a thought-leader on topics ranging from legal technology and AI to the changing role of the GC. Eric's leadership on inclusive language in the legal profession garnered nominations by Chambers in its inaugural inhouse Equity & Inclusion category. This year, Eric's team was named by the American Lawyer as a finalist for its award for legal operations, and Eric was named an individual finalist for AmLaw's awards for culture and wellness and GC of the Year. Eric has been a contributor to

and been quoted on inhouse issues in The American Lawyer; served as a panelist before the Society for Corporate Governance and the American Bar Association's annual meetings, and he has been published on the op-ed page of The Wall Street Journal. He received a J.D. with high honors from The George Washington University Law School and an undergraduate degree, cum laude, in political science from Tufts University.

Harrison Underwood



Harrison, a former Olympic trial fencer, is a legal business process and technology expert with 25 years vast knowledge of the corporate and law firm legal technology and operations landscape. He works with GC/CLO's and Heads of Legal Operations/IT implementing global legal strategies, transformation initiatives, and Enterprise Legal Management systems (IP, Document, Contract, Matter, Ebilling, Ediscovery, Conflicts, and more). He also works with clients to improve and upgrade previously implemented systems and develop processes to drive efficiency of those systems. He has become a trusted advisor to many CLO's, on the use of these systems globally. Prior to founding Brickell Global Legal, he worked with newly formed Morae Legal as their go-to independent contractor for all their large international legal projects. He was also a Director at Wolters Kluwer ELM and FTI Consulting, as well as a Manager at ADP, Huron Legal and Mitrastech Harrison, an avid industry writer and speaker, is considered THE industry expert in global ELM, Spend/Ebilling, and international tax deployments, as well as a recognized leader in legal project management of large-scale ELM implementations.

Amy Andrews



Amy Andrews is Vice President and Associate General Counsel at GoTo Foods, (formerly known as Focus Brands), an Atlanta-based developer of global, multi-channel foodservice brands, including Auntie Anne's®, Carvel®, Cinnabon®, Jamba®, Moe's Southwest Grill®, McAlister's Deli® and Schlotzsky's®. Amy has practiced law for over 15 years and offered counsel on a range of corporate issues, commercial transactions and business matters, including real estate, mergers and acquisitions, domestic and international franchising, corporate governance, data privacy, cyber security, business licenses and permits, intellectual property, risk management and corporate compliance. Prior to joining the GoTo Foods legal team, Amy was an associate in the corporate and real estate practice groups at Baker Donelson. Prior to Baker Donelson, Amy was an associate of the corporate practice group of Davis, Pickren, Seydel and Sneed. She received her undergraduate degree from Rhodes College, cum laude, and her Master of Public Administration degree from the Andrew Young School of Policies Studies at Georgia State University with honors. Amy received her Juris Doctorate from Georgia State University, College of Law, cum laude. Amy is the Chair of the Board of the Franchise & Distribution Section of the Georgia Bar and the Secretary of the Southeast Franchise Forum.

Panelist Questions

- o What is legal ops or legal operations?
- o How does legal ops differ in-house vs. law firms?
- o What skills/qualifications does a legal operations professional need to have?
- o How does a legal ops professional work with attorneys?
- o What is contract lifecycle management (CLM)?
- o What does CLM mean in the law firm setting?
- o What is document management vs CLM?
- o How does legal operations help with CLM?
- o What questions should in-house attorneys be asking as they begin the process of finding and implementing a CLM system?
- o How do you handle adoption and change management with legal operations and CLM?

Let Us Now Praise Legal Ops



"While I brought my own deep experience to the GC role, I found in my legal ops manager an essential guide."



Eric D. Greenberg

Innovative Executive & Legal Leader | Known for Strategic Thinking & Commercial Focus | Experienced in M&A, Cutting-Edge Transactions & Governance | EVP & GC @ Cox Media Group, an Apollo Portfolio Company

February 12, 2024

With GC Portfolios Expanding, A Partnership With Legal Operations Is Becoming Essential

Ask a general counsel what worries them and you're likely to get a list that can range from the

risks of expanded geo-political conflicts and tightening capital markets to challenges like increased regulation and diminished legal budgets. But ask a GC about what helps ease the burden of the role and the odds are increasingly strong that you'll get a singular reply: legal operations. Even as the portfolio of the chief legal officer expands to capture business strategy, external affairs, and even company-wide initiatives—in many cases *because* the GC's portfolio is growing—legal ops is becoming more foundational to the success of the GC and the role of the modern corporate legal department.

I recall a small-group conversation among GCs in which one was especially lamenting organizational challenges. After several responses referenced legal ops, the burdened GC confessed to being unfamiliar with the role. The group's insistence that he needed a legal ops manager was so adamant and urgent that I thought the meeting might come to a stop while we waited for this GC to post for the position in real time.

The story reflects the reality that even as legal ops come into the spotlight, the role still can be misunderstood and under-utilized. The reasons can stem from the very nature and training of the people who lead legal departments. And it can be reinforced by the legal and business media, which naturally tend to focus on the more esoteric aspects of the GC role.

Certainly, legal ops professionals have been eloquent champions of the function's acute value proposition, from finance and data analytics to new operational efficiencies from LegalTech (a particular growth area). Yet—and notwithstanding an ever-growing cohort of GCs who see legal ops as a must-have function—in other corners of the inhouse world an underappreciation of legal ops persists.



Last year, more than 2,500 legal operations professionals met in Las Vegas to attend the annual program of the Corporate Legal Operations Consortium (CLOC),

Don't Put Legal Ops in a Corner

The expanding nature of legal's portfolio can lead GCs to overlook or undervalue the increased efficiency that legal ops can bring to the crucial blocking-and-tackling of the legal department.

Today's GC may get a call from their CEO about issues as varied as the impact of Russian sanctions, the potential regulatory success of a rumored strategic roll-up, or even commercial issues with no apparent legal dimension. When it comes to comparative priorities, there is simply no GC who is unavailable to discuss strategic imperatives.



"Open the document, HAL."

"The suspicion many lawyers innately harbor about technology can make us profoundly skeptical about handing over legal risk assessment to the latest HAL-9000."

Moreover, the very nature of our training as lawyers can lead many chief legal officers to have a blind spot on operational issue. The study of law arms us with an especially acute mode of critical thinking, but budgets and the fundamentals of business operations are often beyond the purview of our training and experience. (For my part, after a recent panel discussion on LegalTech, I was complimented for my "authenticity and vulnerability" because I confessed—although I thought it was a boast—that I did not know how to use Excel.) The irony may be that our weaker training in budgets and operations can lead GCs to disdain and even disregard legal ops because of its focus on these areas.

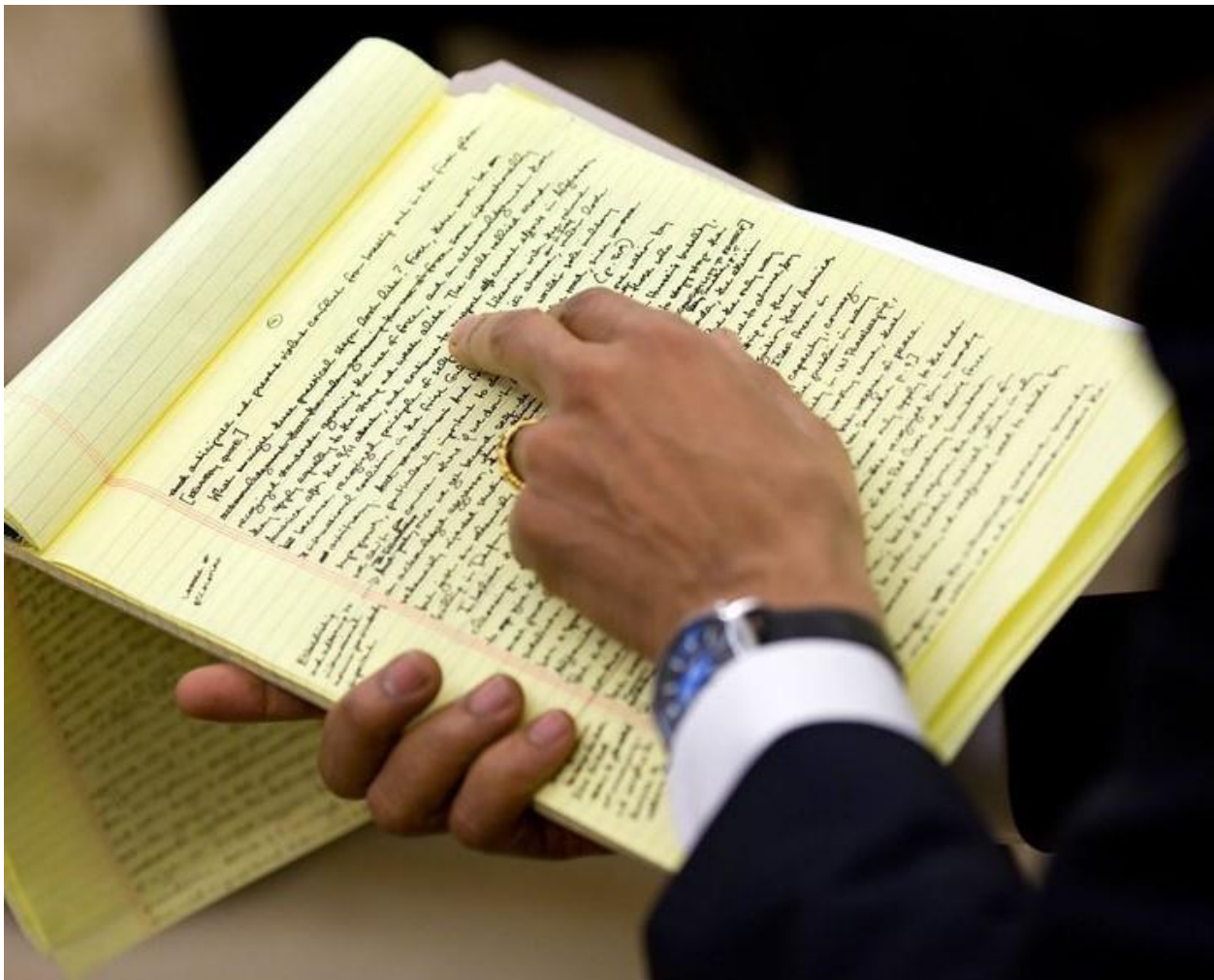
Another reason that GCs may misperceive legal ops is the suspicion many lawyers innately harbor about technology and, especially, its early adoption. Our faith in our own training reviewing and revising documents and the high-stakes we rightly assign to accuracy and nuanced issue-spotting can make us profoundly skeptical about handing over legal risk assessment to the latest HAL-9000.

Legal Ops is a GC's Best Compliment

The experience of an ever-growing cadre of general counsel is that legal operations is an essential compliment to the expanding role, particular training, and the expertise of a chief legal officer. One reason begins at the top with the CEO. While it's true that the CEO is increasingly looking to their chief legal officer as a strategic advisor across the waterfront of the company's business, the CEO is perennially focused on budget discipline and, increasingly, also interested in the integration of efficient business operations into the legal department. This is especially acute because while a CEO may not be positioned to challenge the substance of a GC's legal advice, the CEO almost invariably possesses superior training in budgets and operations.

Even as the GC's role expands, the bedrock role of the legal budget does not become less important. We can prefer a webinar on CFIUS trends over a demo on SaaS for document-holds, but a GC knows that the centrality of budget discipline never diminishes. This is why the legal ops

manager has so often moved to the right hand of today's GC. The frequently complimentary nature of the GC and legal ops manager's roles makes it both crucial and collaborative. For me, coming to the GC role from private practice, I brought deep experience in my company's industry, its regulatory regime, and its M&A environment. I also brought a partner's familiarity with billing practices—the good, the bad, and the I'm-not-paying-for-that. What I did not bring was experience in business operations. In my legal ops manager, I found an experienced counselor, tutor, and guide.



President Barack Obama demos the original LegalTech. (Photo by Pete Souza.)

"In equilibrium with a lawyer's comfort in an analogue world, a legal ops manager can provide crucial LegalTech reconnaissance."

We bring different—and symbiotic—talents and experience. Together, we have delved into the source of our legal costs and extrapolated past experiences into patterns in legal spend. A talented legal ops leader can help translate a GC's judgments and vision into a coherent financial

plan and organizational structure.

The Venn diagram of needed cost-efficiency and the advent of new technologies (especially in AI) has created an explosion of new offerings in LegalTech. While you won't suddenly find me at a hackathon, you will find me huddling with my legal ops manager to discuss how a new technology or service could make us better, faster, or more cost-efficient. I still believe that my background as a lawyer—asking hard questions, spotting a material issue, and reflexively skeptical of technology and comfortable in an analogue world—provides a healthy and balanced resistance to the allure of the latest shiny new toy in LegalTech.

The image shows a blurred financial spreadsheet or dashboard. It features several rows of data with monetary values and percentages. The values are presented in a clean, professional font, with some numbers in red to indicate negative values. The overall appearance is that of a modern, data-driven interface.

[Segment Name]	[Segment Name]	[Segment Name]	[Segment Name]
\$150,000.00	\$125,000.00	\$275,000.00	\$460,000.00
\$80,000.00	\$190,000.00	\$275,000.00	\$550,000.00
\$335,000.00	\$435,000.00	\$140,000.00	\$410,000.00
(\$35,000.00)	(\$135,000.00)	\$650,000.00	\$1,400,000.00
0%	0%	\$350,000.00	\$700,000.00
		100%	

"Legal Ops also signals to the C-suite that the legal department too can function with demonstrable business discipline."

But in parallel—and perhaps in equilibrium—a legal ops manager can provide crucial LegalTech reconnaissance. On a recent panel on legal technology, I sat beside talented and sophisticated legal ops specialists who dissected the details of dashboards and unpacked a product's UI. As a GC, this is neither my strength, nor my value proposition. Yet, when an experienced lawyer's vision for the legal function is matched with a savvy operator's insight into technology, the result can be the ultimate synergy for the legal department.

For a GC, this can be gratifying—and even novel—because the results of legal ops are often measurable. Frequently, no one but the legal department will fully understand the import of what we helped accomplish (or, more accurately, what we helped avoid). Legal doesn't have metrics

for the dog that didn't bark.

By contrast, through my partnership with legal ops, I've often discovered measurable outcomes. (Yes, thank you, Excel.) The results show up in reduced spending or cost-savings—both in our department and, in one case where we expanded the capacity of a legal technology, across the company. It also signals something more nuanced to the C-suite: that the legal department too can function with demonstrable business discipline, cost-efficiency, and technological innovation.

"Perhaps least obvious, legal ops can help shape the culture of the legal department."

Last, and perhaps least obvious, legal ops can be a partner in shaping the culture of a legal department. Without the essential tools and skills of legal ops, a GC's budget can feel more like the praying-hands emoji than a well-developed financial plan. Legal ops have given us the tools to constructively talk to law firms who impress us with their advice, but who frustrate us with their billing practices—and to then fix the problem and improve the relationship. It's helped our attorneys manage individual budgets and produce savings that aggregate into meaningful financial results.

Part of the success stems from signaling to the department that legal ops matters. The GC's endorsement can be especially crucial because there can be hierarchical divisions between lawyers and non-lawyers—with legal ops professionals typically in the latter category. For their part, some legal ops leaders have reported feeling sidelined or less-than because of this chasm, whether real or perceived. The broader, if unintended, effect is to diminish the capacity of the lawyers as much as the legal ops professional.

By emphasizing the importance of the legal ops' role—and even sometimes by also acknowledging that some of our relative weaknesses as lawyers are counter-balanced by many of the distinct strengths in legal ops—GCs are elevating a strategic ally. Legal ops leverage our time to focus on an expanding portfolio, builds esprit de corps among lawyers and non-lawyers, and delivers financial discipline and informed access to cost-efficient new technologies. The result can be a dynamic and multidimensional department in which legal excellence is matched with organizational acumen. For today's legal department, both have become essential.

Eric Dodson Greenberg is Executive Vice President, General Counsel & Corporate Secretary of Cox Media Group, a multi-platform media company headquartered in Atlanta and serving major markets across the U.S.