

Your Letterhead Here

I. INTRODUCTION

1. This document is issued by the office of the General Counsel with the aim of helping you to succeed in your current assignment and become a long-term supplier to us. It is separate from the contractual terms set out in your Letter of Engagement or any other guidelines we may send you.
2. In this document we describe the way we would like you to deliver legal services for us. We do this by defining the attributes that we look for in outside counsel in their daily work.
3. We give repeat business to firms who not only meet high standards of technical competence, which is a given, but also provide excellent client service. These guidelines will help you to understand our service delivery expectations, and so become a long-term supplier.
4. When assigning future matters, we will treat your compliance with these guidelines as a KPI.
5. In short, this document constitutes a playbook on how to get rehired by us.

II. THE HIGH-LEVEL ATTRIBUTES

We have defined a set of service level requirements for those who represent us. At a high-level, we regard the attributes of client service as follows:

1. Client-facing
2. Integrity-based
3. Lean
4. Auditable; and
5. Befitting our business.

III. THE PRFERRED WAY

Outside counsel can achieve the above attributes by adopting certain operating methods. These are summarized below:

1. **Specialize in us:** Make it your business to understand us, our business and our processes.
2. **Take a Project Management Approach:** Build and execute a well-structured plan, based on legal-ops best practices. This plan should be:
 - a. Aligned to our goals and expectations;
 - b. Efficient;
 - c. Effective;
 - d. Transparent;
 - e. Monitorable;
 - f. Correctable;
 - g. Attuned to critical issues; and ultimately
 - h. Accountable.
3. **Be Transparent:** Your fearless transparency will earn our trust, so disclose your successes and your missteps. Operational transparency gives us line-of-sight to your working methods, challenges, opportunities, status and delivery against planned milestones.
4. **Nurture the Relationship:** Embrace the concept of a client-facing relationship.
5. **Provide Value:** Regardless of our agreed remuneration model, we look for value in everything you do. This value-driven mindset should extend to everyone in your team, every task, every day.

IV. REMEMBER THE 3 Rs

1. **RECOMMENDATIONS:** We seek business advice, not academic theory. This means recommendations and some assessment of risk, based on experience and data;
2. **RISK:** We look for open mindedness, an adaptable gameplan, and a process management approach that imbues safety and predictability. This calls for a mindset that delivers risk-based strategy; and

3. **RELIABILITY:** We give repeat business to firms which offer proven reliability, in the sense of getting to the right outcome, within budget and on time. The purpose of these guidelines is to share the operating methods which will get you a reputation for reliability.

V. LEAN LEGAL OPERATIONS

As a business, we deploy the tenets of lean in many of our operations. We look for the same characteristics in all our suppliers, including outside counsel. Lean can be summarised as three key qualities: efficiency, effectiveness and transparency. For legal operations, these can be manifested as follows:

I) Efficiency– To Eliminate Waste

1. Pick the right team at the outset, and keep to it.
 - a) Show us the team sheet at the outset and get our agreement to it;
 - b) Don't play people out of position; for example partners should not do associates tasks (and vice versa);
 - c) Build a team which has resilience without over lawyering;
 - d) Don't substitute or add team members without specific approval; and
 - e) If a player leaves the team tell us and discuss substitution options.
2. Effectiveness – To Eliminate Duplication
 - a) Create clear internal lines and prevent needless internal emails, multiple people being copied into and reading the same email or document;
 - b) Don't churn lawyer time on inefficient research, doc prep or analysis;
 - c) Understand that valueless internal discussions and conferences won't be chargeable; and remember
 - d) We won't pay for duplication of any kind, so it's in outside counsel's interests to eliminate it.
3. Single Source Lean Reporting
 - a) Agree reporting protocols with us and identify your reporter. This can be an associate.
 - b) Learn and adopt the 'lean reporting' methodology.
4. Legal Ops Leadership:
 - a) Identify a lean legal-ops lead within your team. Again, this can be an associate.
 - b) Ensure that your legal-ops lead is supplied with suitable training.

II) Effectiveness - To Meet Our Goals & Expectations

1. Make it your business to specialize in us, our organisation and our processes.

2. For each assignment, make sure that you understand:
 - a) our goals
 - b) our expectations
 - c) our sensitivities
 - d) our investment and risk appetite
3. For each assignment, make sure that every step taken is in service of meeting these goals and expectations.

III) Transparency - To Avoid Blindsiding Us

1. Scope the assignment with us;
2. Monitor progress to identify drift and variances;
3. Give us both good and bad news, always unvarnished;
4. Tell us at the earliest opportunity if
 - a) Something significant goes wrong
 - b) Any part of the plan is materially affected by events
 - c) Anyone leaves the team
5. Suggest a mitigation strategy to us.

Conclusion & Next Steps

We recognize that many of the proficiencies described in this document are untaught. We have therefore validated ‘Lean Law’ as the suggested toolset to acquire these skills. It is also the preferred educational service of GLL (Global Leaders in Law) and Corporate Counsel.

We recommend that at least one member of your team acquires Lean Law Accreditation. The curriculum is a series of engaging lessons, tools and videos, available through ALM Media <https://www.law.com/lean-adviser/static/lean-adviser>.