

# Legal Function Management and Operations Training Course

4 – 8 January 2027
Lisbon

AGILE LEADERS
Training Center

AGILE LEADERS
Training Center

# Legal Function Management and Operations Training Course

**Ref:** 1762_232483 **Date:** 4 – 8 January 2027 **Location:** Lisbon **Fees:** 5700 Euro

## Overview

Legal Function Management and Operations Training Course is a one-week practical programme for leaders who need to run a legal department or legal-services team as an accountable, measurable service. Participants connect legal function management and operations with strategy, demand and matter intake, service delivery models, supervision, resources, spend, external providers, knowledge, information, technology, quality, metrics, and continuous improvement. Each participant leaves with a Legal Function Management and Operations Plan. Agile Leaders Training Center develops disciplined legal-service leadership.

## Who Should Attend

- General counsel, heads of legal, and deputy legal leaders responsible for function performance
- Legal operations managers responsible for workflow, data, technology, spend, and improvement
- Law-firm practice managers and legal-services supervisors responsible for delivery capacity and quality
- Senior legal advisers preparing for team, portfolio, or department leadership
- Legal department business partners supporting finance, procurement, HR, technology, and reporting

The course addresses the management and operating system of a legal function. It does not teach substantive law, promise a prescribed regulatory model, or cover law-firm marketing and business development.

## Departments and Industries

- In-house legal departments, general counsel offices, government legal services, and regulators
- Law-firm practice groups, shared legal services, legal-aid organisations, and professional-services teams
- Legal operations, finance, procurement, information governance, knowledge, technology, and HR partners
- Financial services, energy, healthcare, technology, infrastructure, manufacturing, and public administration

AGILE LEADERS
Training Center

## Learning Objectives

- Translate organisational needs into a legal-function strategy, service portfolio, and priorities
- Control demand through intake, triage, risk-based prioritisation, and matter planning
- Design roles, capacity, delegation, supervision, and service delivery models
- Manage budgets, legal spend, external counsel, vendors, knowledge, information, and technology
- Define service standards, quality controls, performance measures, and stakeholder reports
- Build a sequenced legal operations maturity and improvement roadmap

## Day 1: Legal Function Strategy and Service Portfolio

- Organisational Context, Stakeholder Need, and Legal Demand Map
- Legal Function Mandate, Risk Appetite, and Strategic Priorities
- Service Portfolio, Scope, Ownership, and Service Boundaries
- Operating Principle, Governance, and Decision-Rights Charter
- Annual Legal Function Plan and Stakeholder Engagement Calendar

## Day 2: Demand, Matters, Capacity, and Supervision

- Matter Intake, Triage, Urgency, and Risk Classification
- Prioritisation, Work Allocation, Capacity, and Resource Planning
- Matter Plan, Milestone, Dependency, and Status Control
- Delegation, Direction, Supervision, and Quality Review Matrix
- Escalation, Workload, Wellbeing, and Service Continuity Controls

## Day 3: Delivery Models, Spend, and External Providers

- Insourcing, Shared Service, Panel, Alternative Provider, and Automation Choices
- Legal Budget, Forecast, Accrual, and Spend Category Map
- External Counsel Selection, Scope, Fee, and Performance Controls
- Vendor Governance, Data, Security, Confidentiality, and Exit Requirements
- Value, Outcome, Cost, and Service Delivery Review

## Day 4: Knowledge, Information, Technology, and Performance

- Knowledge Asset, Precedent, Playbook, and Expertise Map
- Information Governance, Access, Retention, Privilege, and Security Controls
- Legal Technology Requirement, Workflow, Adoption, and Benefit Plan
- Service Standard, Quality, Cycle Time, Outcome, and Satisfaction Metrics
- Dashboard, Narrative, Risk, and Stakeholder Reporting Pack

## Day 5: Legal Operations Improvement Practice

- Exercise: Assess Legal Function Management and Operations Maturity
- Exercise: Redesign Intake, Prioritisation, and Matter Control
- Exercise: Review Capacity, Spend, and External Provider Performance
- Exercise: Build a Metrics and Stakeholder Reporting Pack
- Capstone Exercise: Legal Function Management and Operations Plan

## Practical Exercises

- Map legal demand and stakeholder expectations, then define a service portfolio and boundaries.
- Triage a mixed matter queue, allocate resources, design supervision, and communicate priorities.
- Compare delivery options and build controls for external counsel scope, fees, information, and performance.
- Select a limited set of metrics and turn them into an improvement decision and stakeholder narrative.

## FAQs

### What is legal function management and operations?

It is the system used to align legal work with organisational priorities, control demand and delivery, manage people and resources, assure quality, use information and technology responsibly, and improve measurable service outcomes.

### How does this course differ from substantive legal training?

Substantive legal training develops knowledge of a field of law. This course develops the management system for deciding what work enters the function, how it is delivered and supervised, what it costs, and how performance improves.

### Is the course only for large legal departments?

No. The tools scale to a small legal team, public legal service, practice group, or mature legal-operations function. Participants select controls and metrics proportionate to demand, risk, resources, and maturity.

### Which legal department metrics should be used?

Use a focused mix linked to decisions, such as demand, risk, cycle time, workload, forecast accuracy, external spend, outcome, quality, rework, service reliability, and stakeholder understanding. Avoid collecting measures without an owner or use.

## What is included in the final management plan?

It includes mandate and priorities, service portfolio, governance, intake and triage, capacity and supervision, delivery models, budget and providers, knowledge and information controls, technology needs, service standards, metrics, reporting, and an improvement roadmap.

## Conclusion

Participants leave with a Legal Function Management and Operations Plan that turns fragmented management activity into a coherent service system. The plan supports accountable priorities, controlled delivery, effective supervision, responsible spend, usable knowledge, reliable data, and sequenced improvement.