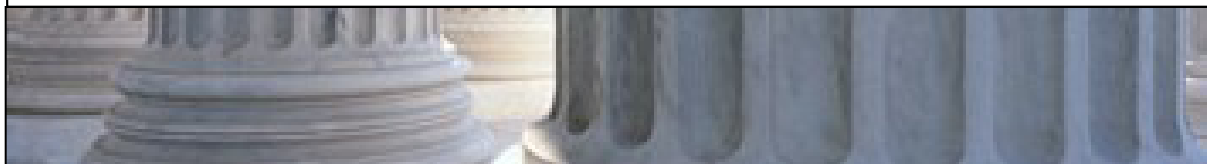


2020
Chief Legal Officer Survey
An Altman Weil Flash Survey



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The 2020 Chief Legal Officer Survey

For 21 years, Altman Weil's *Chief Legal Officer Survey* has reported on the complex and challenging job of managing a corporate law department. This year, all of the same challenges are still in play, but they have been heightened by a pandemic that has swept the world and continues to disrupt the global economy.

In the fall of 2020, 66% of Chief Legal Officers surveyed report that their organization's revenue is down this year in response to the COVID-19 crisis, and 77% say their law department's workload is up. These dynamics accelerate the law department's perennial problem of 'doing more with less' – but also, perhaps, create a new level of urgency and focus to make hard choices about staffing, efficiency and resource allocation to advance positive change.

Chief Legal Officers report that on average they have spent 15% of their time this year on managing issues relating to COVID-19 – and these are surely hours on top of an already full schedule of overseeing the department, advising organization executives on strategy and governance and an array of other responsibilities. In law departments that have Legal Operations Managers, those senior administrators additionally spent 10% of their time on pandemic-related issues.

The Law Department Workforce

The survey found that 11% of law departments laid off employees in response to COVID-19 this year. Three percent of departments cut managing lawyers and 4% cut staff lawyers. Twice as many cut support staff (7%) and paralegals (8%). CLOs cited decreased budgets, efficiency efforts and greater use of technology tools as the primary reasons for layoffs.

In projecting plans for the in-house lawyer workforce in 2021, general counsel anticipate continuing the pattern of prior years in which about four times as many departments have increased lawyer headcount as those making decreases. This year, 36% of departments plan to increase lawyer staff in the next twelve months, 9% plan decreases and more than half will make no change.

Despite the greater pressure on workloads this year, there is a marked dip in plans to hire contract lawyers in the next 12 months, dropping from 19% of departments that planned increases in hiring last year to only 11% that plan to do so now.

CLOs will make more adjustments to non-lawyer staffing levels. The number of departments planning to reduce support staff in the coming year doubled from 6% to 12% this year while plans to increase staff are unchanged at 12% in both years. Paralegal hiring will be significantly scaled back. Just 16% of law departments plan to increase their paralegal workforce in the coming year, compared to 28% that planned to do so last year. The number of departments planning decreases will rise from 4% to 7%.

Some of the reductions of staff are likely cuts that Chief Legal Officers felt could have been made in prior years due to process improvements and increased reliance on technology. Now CLOs understand that the staff reductions can no longer be avoided in this environment of newly constrained budgets.

Total Law Department Budget

The survey found that 43% of law departments increased their total spend in 2020, 40% decreased and 17% were unchanged. These numbers closely track 2019 change levels and reflect the caution of a majority of Chief Legal Officers who believed a year ago that an economic recession was on the horizon. In 2021, 44% of CLOs anticipate that their total budgets will decrease, while 39% plan increases. If these plans are borne out, it will be the first time in ten years that more law department budgets are shrinking than growing.

The allocation of spending among the inside personnel and operations, outside counsel and non-firm vendor portions of the law department budget held steady in 2020. For the third year running, in-house spending was highest at 47% of total spend, followed by law firm expenditures which ate up 46% of the average budget and non-firm vendor spend that took 7% of the department's budget in 2020.

In-House Spending

Over the last ten years, data on annual changes to the in-house portion of the law department budget typically have shown at least twice as many departments increasing their internal spend each year compared to those making decreases. However, this year, that differential changed significantly as 40% of departments made increases (a ten-year low), and 32% made decreases (a ten-year high). This retrenchment is also reflected in CLOs predictions for 2021 spending in which only 36% of departments intend to increase inside spending, while 34% plan decreases.

Outside Counsel Spend

Continuing a long-term trend that first emerged after the Great Recession, more departments decreased outside counsel spend in 2020 compared to those that made increases, and Chief Legal Officers expect to do the same in 2021. CLOs pressed to cover more work with tighter budgets have developed an array of techniques to limit and reduce law firm spending, including shifting work to lower cost firms or to alternative service providers, bringing law firm work in-house to be done by lawyers and non-lawyer department staff, as well as negotiating discounts on standard hourly rates.

In 2020, the median discount on law firm hourly billing rates was 10%, a number that has held steady for the last five years. In response to the COVID-19 crisis, 33% of law departments asked for additional discounts from law firms. Only 2% of departments report they paid higher hourly rates for urgent or high-demand work during the pandemic.

Vendor Budgets

For 2020 non-law-firm vendor spending, usually the most stable part of the law department budget, showed more law departments making cuts than at any time in the last 10 years – up from 9% in 2019 to 18% this year. That trend looks like it will be extended into 2021, as 25% of law departments say they plan to reduce their vendor spend next year. In the pandemic environment, it is not surprising for law departments to defer new purchases when possible or to negotiate for any available discounts, and we expect vendors will likely try to accommodate them in the short term.

Legal Operations Managers

The number of departments with Legal Operations Managers continues to increase according to the survey. In 2020, 50% of all departments report they have a professional administrator, up from 46% last year. Three-quarters of departments with over 50 lawyers say they have someone in the role. It's noteworthy that – unlike all other law department job categories – not a single operations manager has been subject to layoffs during the pandemic, according to the survey.

This increasingly prevalent position has enabled Chief Legal Officers not only to delegate day-to-day department operations, but also to tap into special expertise on managing finances, technology, outside counsel relationships and more. Legal Operations Managers can focus on resource allocation, cost control, efficiency and other key performance metrics in a way that many CLOs do not have time to do. The

payoff on an investment in an operations manager is particularly evident in a year like this one in which all elements of the department are under stress.

Law Firms and the COVID Crisis

This year we asked Chief Legal Officers what actions their outside law firms had offered proactively to assist law departments during the COVID-19 crisis, and how valuable each effort was.

Ninety percent of all law firms offered their clients general information on pandemic issues, 46% advised on available COVID benefits, and 27% stepped it up a level with specific COVID-related advice customized to the client. Each of these areas of assistance was rated between 6.6 and 6.8 on a value scale of 0 (no value) to 10 (great value). Law firms were most active in this area and added value at a crucial time.

However, very few firms went beyond advisory offerings to address the more tangible budgetary challenges their clients were facing this year. Only 12% of firms offered to collaborate on new alternative fees, 10% proactively offered additional discounts, and 7% suggested new process efficiencies to reduce costs. Each of these infrequently-offered, but clearly desirable types of assistance received high value ratings of between 7.2 and 7.8.

Even fewer law firms reached out to their clients to support them in their workload crunch. Nine percent offered improved communication and access to key lawyers – an effort CLOs rated at a 6.1 in value; and 1% of law firms offered to sit in on company meetings in an advisory capacity at no charge – rated at 6.0 in value. Law departments found the greatest value – rated 9.5 on the 10-point scale – from law firms that seconded an associate from their ranks to the department at no charge. Unfortunately, only 3% of law firms made that offer. This appears to be an area of potentially significant opportunity for law firms that have underutilized associates in their ranks.

Although law firms surely struggled to address their own COVID-19 challenges this year, there were opportunities available to build loyalty and cement client relationships that were left on the table in 2020.

What Has Changed?

Has COVID-19 changed the way law departments will operate going forward? A large majority of Chief Legal Officers see the primary change as simply logistical. Seventy-seven percent of CLOs expect remote and/or more flexible working arrangements will

become commonplace for law department lawyers and staff. This change will encompass not only office attendance but also court appearances, depositions, mediations and interactions with clients, law firms and vendors.

Some CLOs commented on other pandemic-related changes, including a greater use of technology tools, more attention to cost control and workforce reallocations to optimize value. These really represent accelerations of existing trends rather than newly emerging ones, but the greater pressure and urgency of the current environment may create new opportunities for leaders to push their law departments forward in these areas.

What's Next?

The *Chief Legal Officer Survey* narrowed its scope this year, focusing primarily on the ramifications of this overwhelming, external event – the COVID-19 crisis – that has pinned us all in place since March. In that context, we found Chief Legal Officers have demonstrated resilience, showing reasonable caution in pulling back on spending where possible and cutting some personnel while largely protecting their workforce talent. Legal Operations Managers have met the moment with a skill set well-designed to guide their departments through the logistical challenges, identify and root out areas of waste and make needed resource reallocations.

Now it's a waiting game. In this time marked simultaneously by profound disruption and an odd stasis, corporate law departments are well positioned to sustain themselves through the remainder of the crisis period and emerge as leaner, stronger organizations thereafter.

The 2020 Survey

The *Chief Legal Officer Survey* has been conducted and published annually by Altman Weil since 2000, most recently in September and October 2020. One hundred and nineteen responses were received for the 2020 survey, 12% of the 966 law departments invited to participate. Demographic and budgetary data on responding law departments are included in the survey report.

The survey report follows and is online at www.altmanweil.com/CLO2020.

Survey Methodology

The large majority of survey questions were posed in a multiple-choice format and responses are reported as received. Question text is transcribed in the following report exactly as it appeared in the survey. Where there were special instructions, rating scales, or supplemental definitions, that information is also included. Free text data submitted by respondents was reviewed and, in a handful of cases, edited to correct obvious typographical errors.

About Altman Weil

Founded in 1970, Altman Weil, Inc. is dedicated exclusively to the legal profession. It provides management consulting services to law firms, law departments and legal vendors worldwide. The firm is independently owned by its professional consultants, who have backgrounds in law, industry, finance, marketing, administration and government.

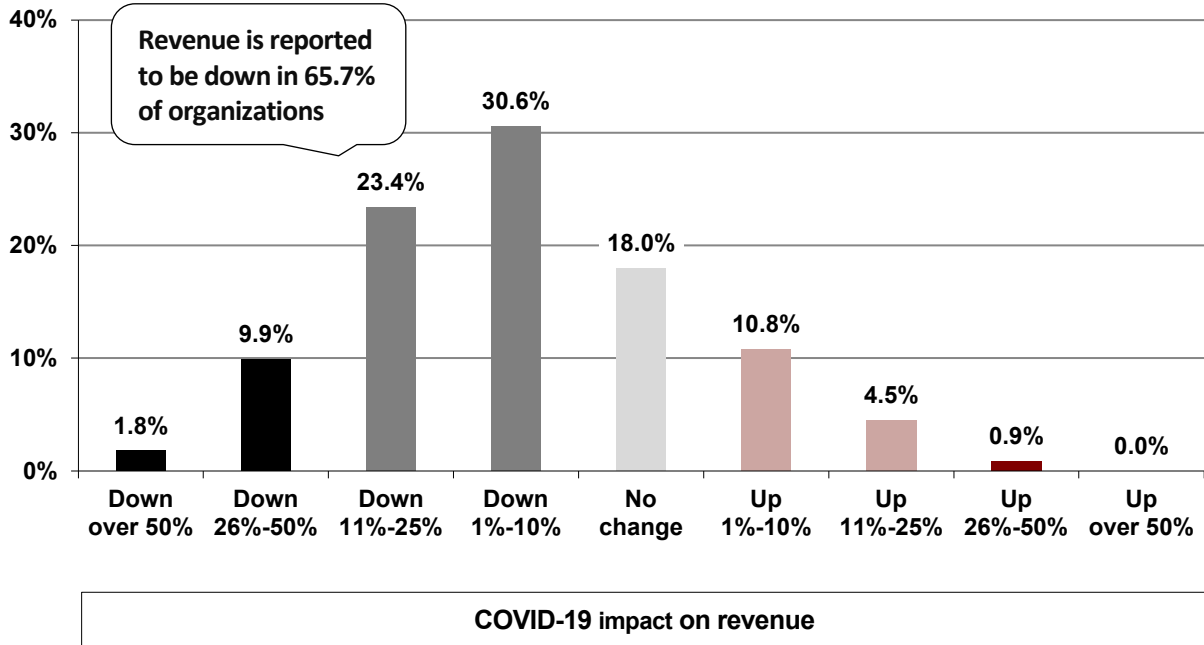
More information on Altman Weil can be found at www.altmanweil.com.



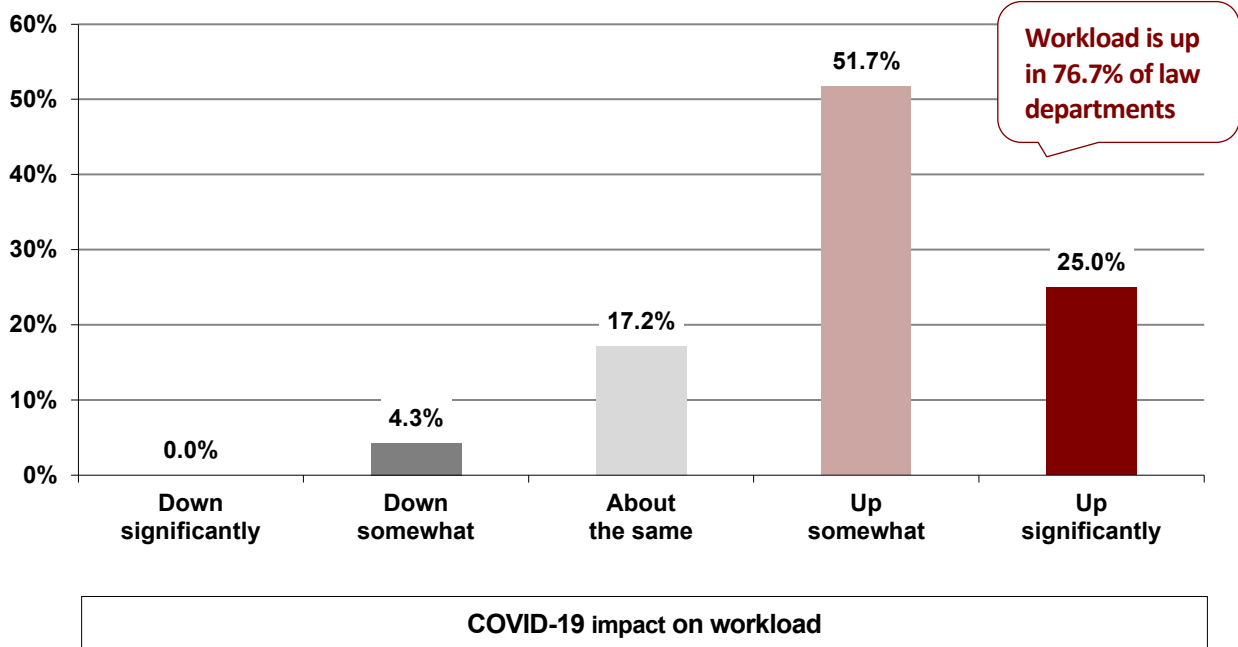
The Impact of COVID-19

COVID-19

How has the COVID-19 crisis affected your organization's revenue this year?



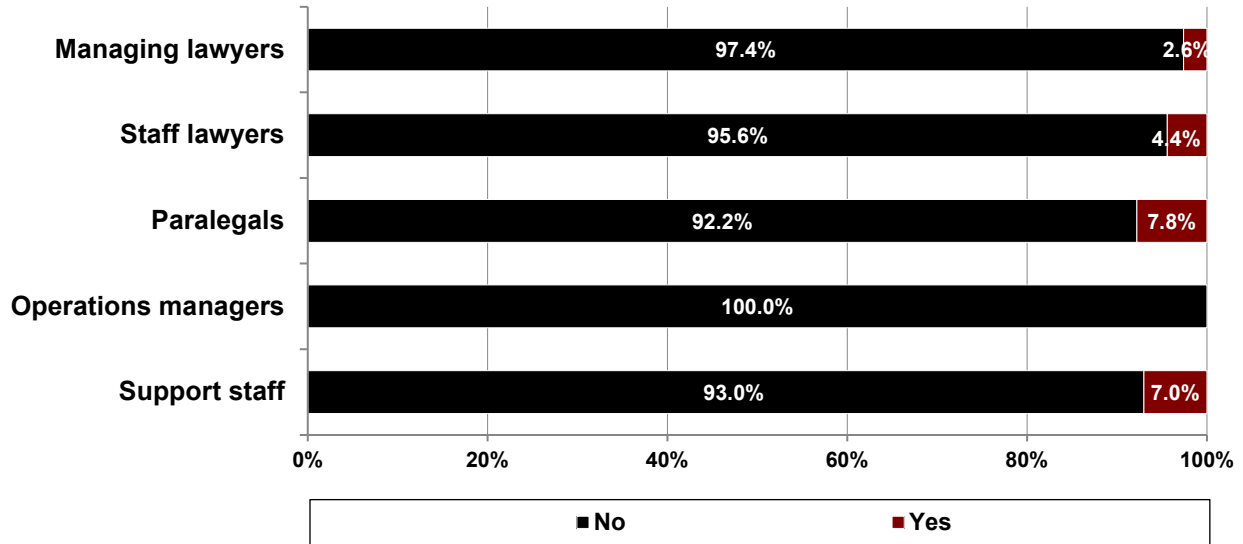
How has your law department's overall workload changed in light of COVID-19?



Law Department Workforce – Lay-Offs

COVID-19

Did your law department lay off any lawyers or staff in response to COVID-19?



FOLLOW-UP QUESTION...

Asked of those of law departments that have made layoffs in any lawyer or staff category.

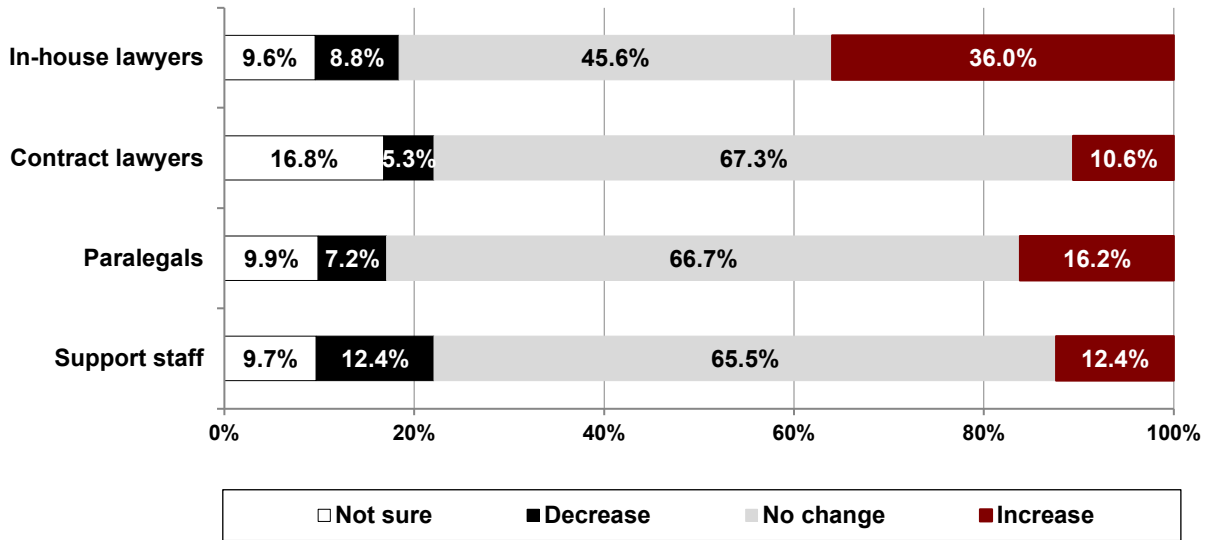
If you have made lay-offs, please estimate how many workers have been laid off as a percentage of the total number of individuals employed in each job category.

	1% to 5%	6% to 10%	11% to 20%	21% to 30%	Over 30%
Managing lawyers	66.7%	0.0%	33.3%	0.0%	0.0%
Staff lawyers	20.0%	0.0%	60.0%	20.0%	0.0%
Paralegals	44.4%	0.0%	0.0%	22.2%	33.3%
Support staff	50.0%	25.0%	0.0%	0.0%	25.0%

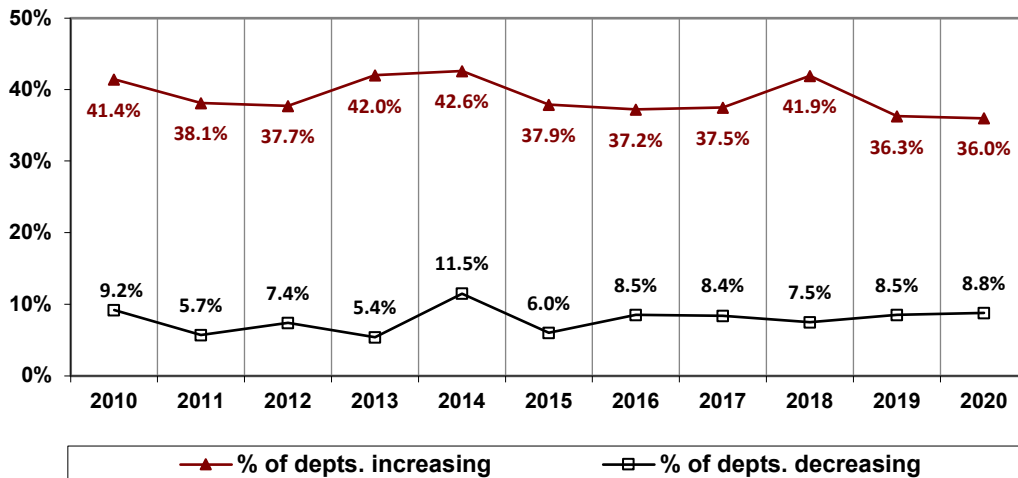
Law Department Workforce – Next 12 Months

OUTLOOK 2021

Within the next 12 months, do you plan to increase or decrease your Law Department workforce?



TREND: Increase or decrease in-house lawyer workforce in the next 12 months



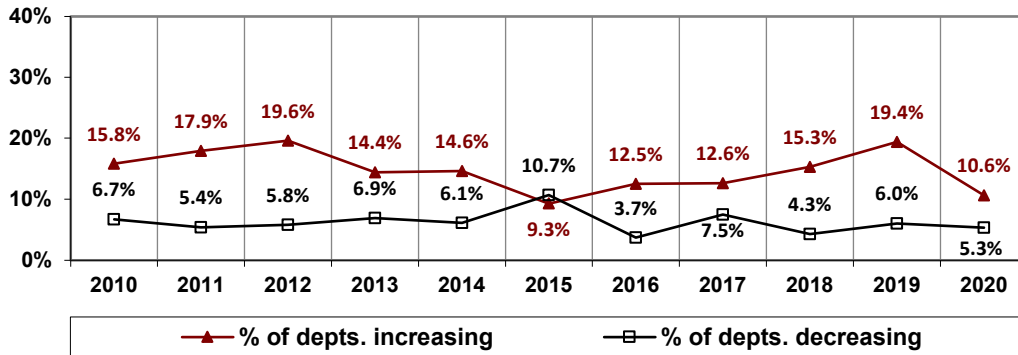
Even in this year of upheaval, plans for in-house lawyer staff continue unchanged, with anticipated growth outpacing cuts by a greater than four-to-one margin.

Trend data compiled from 2010 - 2020 Chief Legal Officer Surveys.

TREND: Law Department Workforce Plans for the Next 12 Months

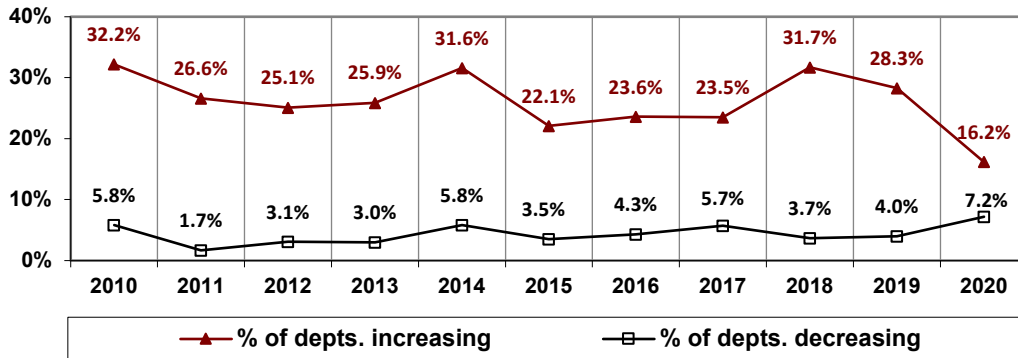
Charts show what percentage of departments increased their workforce, and what percentage decreased their workforce in each category. The balance of departments, to total 100%, made no change in the category and is omitted in each of these charts.

CONTRACT LAWYERS



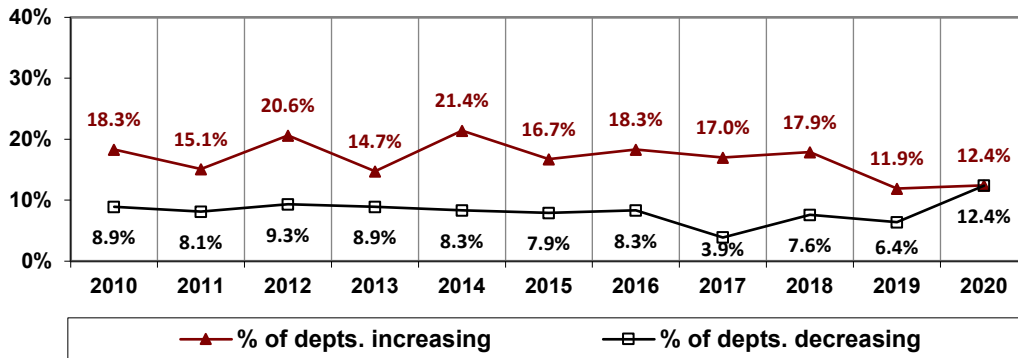
Despite increasing workloads, few law departments are planning increases in contract lawyers.

PARALEGALS



Law departments plan more cuts to paralegal ranks, and a slowdown in hiring.

SUPPORT STAFF

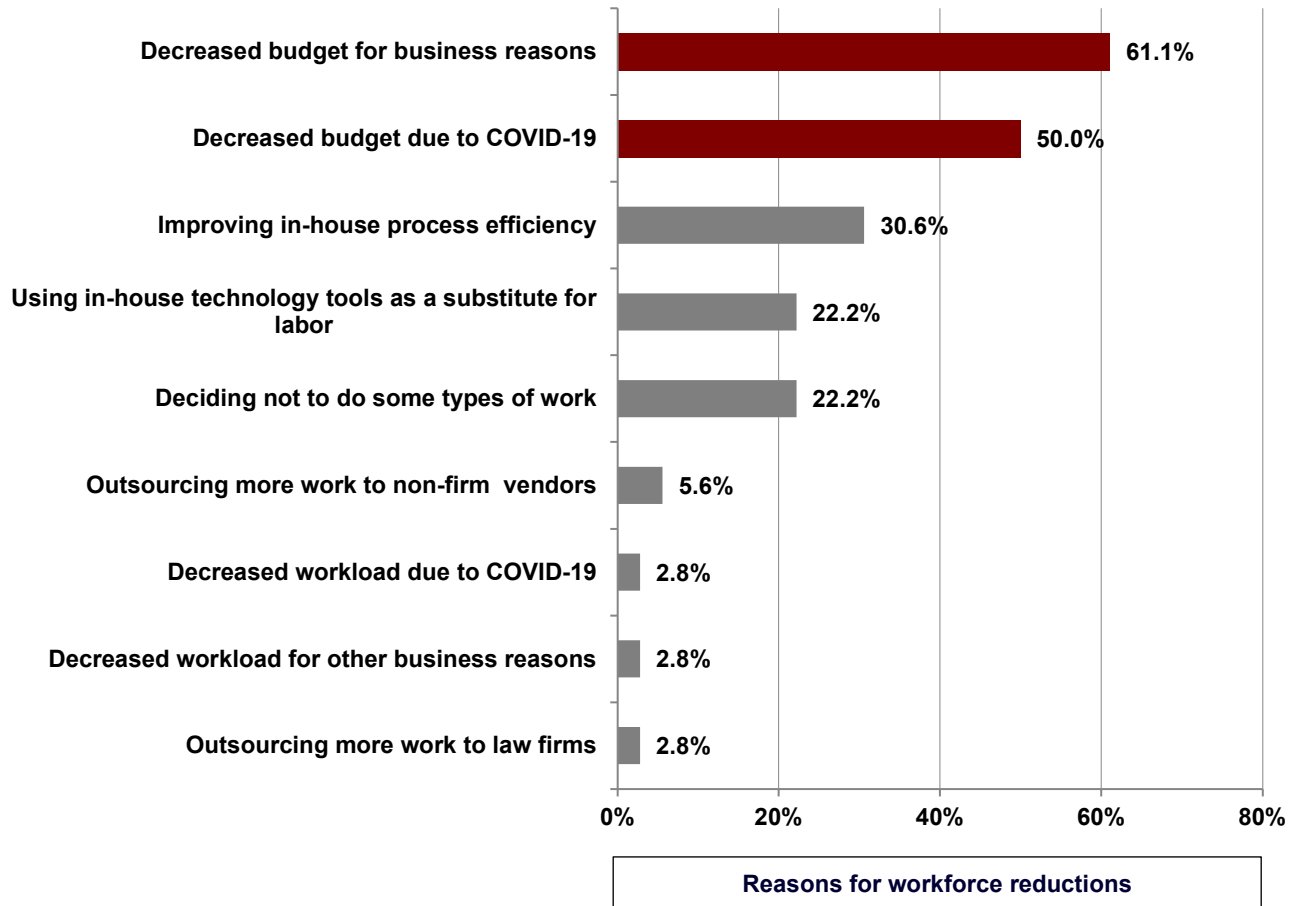


Almost twice as many departments are planning cuts to support staff in the coming year.

Trend data compiled from 2010 - 2020 Chief Legal Officer Surveys.

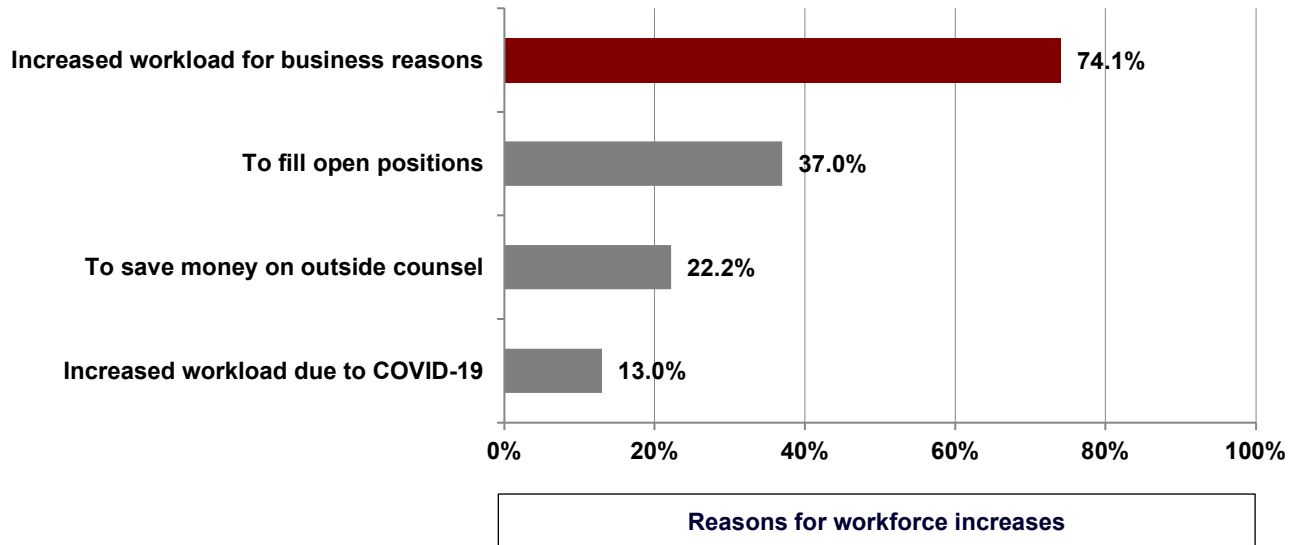
Law Department Workforce – Reasons for Reductions

If you have already decreased your workforce in 2020 or plan to do so in the next 12 months, what are the primary reasons? (Check all that apply.)



Law Department Workforce – Reasons for Increases

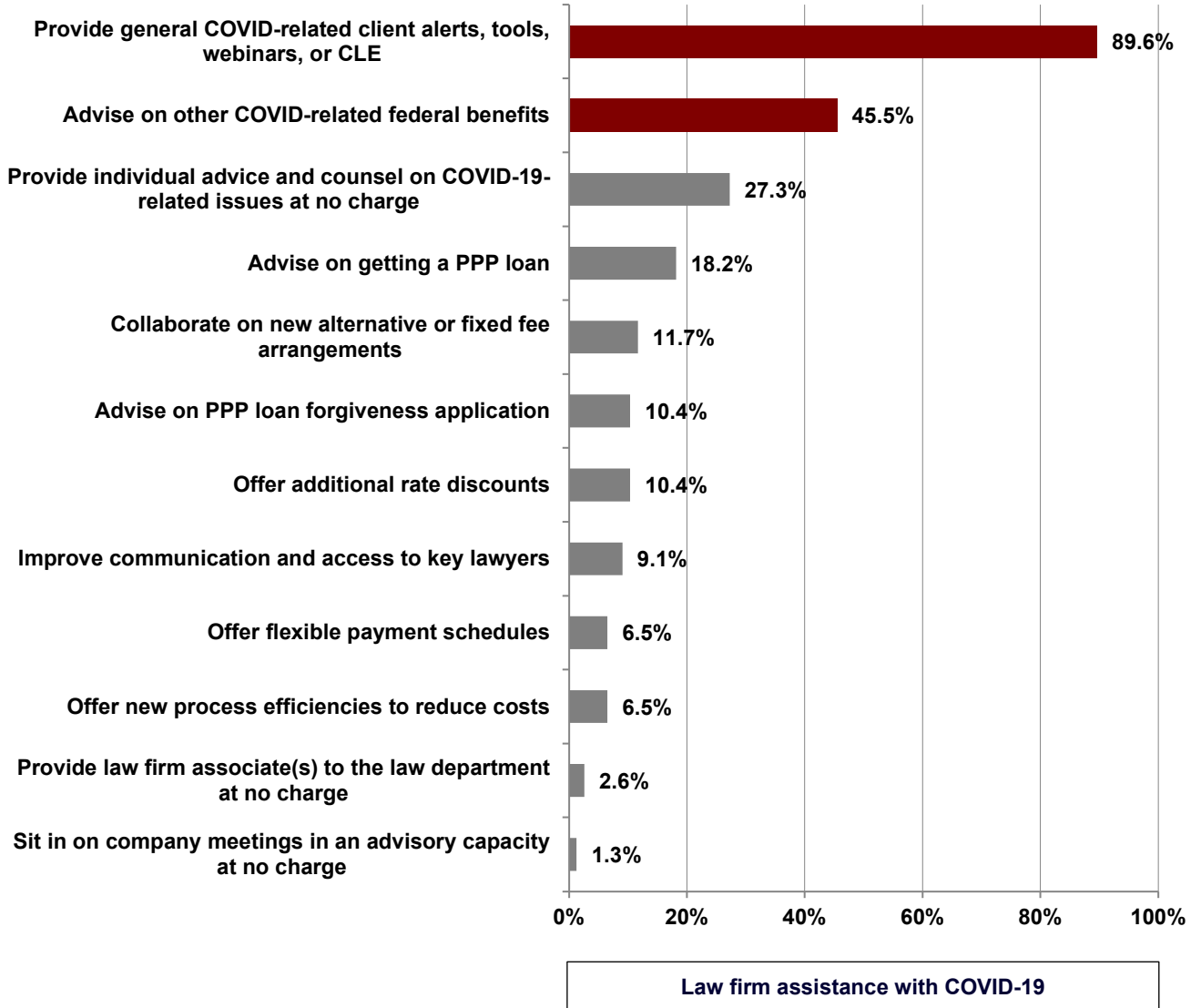
If you have already increased your workforce in 2020 or plan to do so in the next 12 months, what are the primary reasons? (Check all that apply.)



Law Firm Efforts to Assist During the COVID-19 Crisis

COVID-19

What actions have your outside law firms offered proactively to assist your law department during the COVID-19 crisis? (Check all that apply.)



Law Firm COVID Assistance – By Department Size

COVID-19

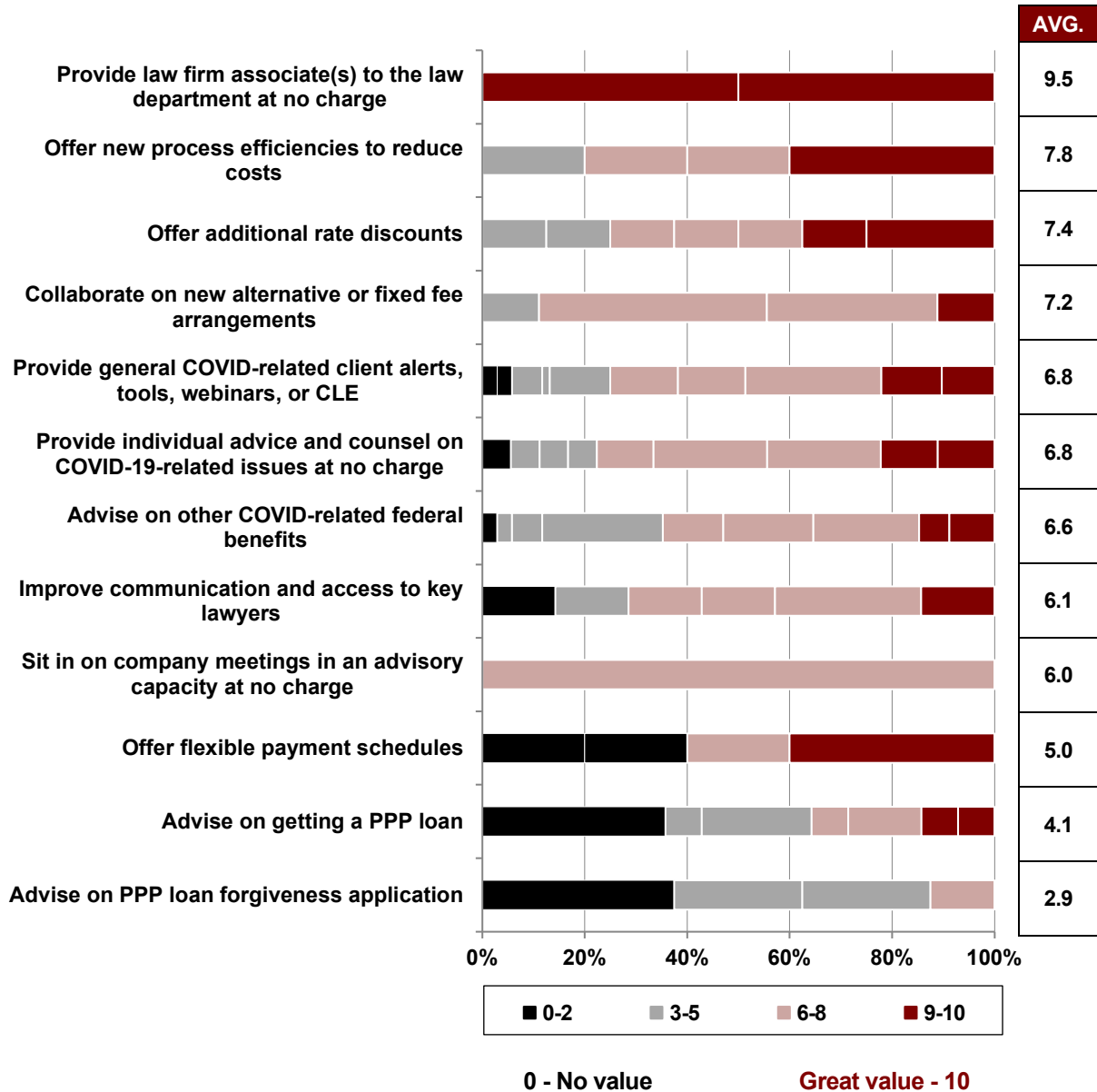
What actions have your outside law firms offered proactively to assist your law department during the COVID-19 crisis? (Check all that apply.)

	1-10 lawyers	11-50 lawyers	51 lawyers or more
Provide general COVID client alerts, tools, webinars or CLE	84.8%	95.5%	90.9%
Advise on other COVID-related federal benefits	57.6%	40.9%	31.8%
Provide individual advice on COVID issues at no charge	30.3%	18.2%	31.8%
Advise on getting a PPP loan	30.3%	9.1%	9.1%
Collaborate on new alternative or fixed fees	9.1%	4.5%	22.7%
Advise on PPP loan forgiveness application	18.2%	9.1%	0.0%
Offer additional rate discounts	6.1%	13.6%	13.6%
Improve communication and access to key lawyers	3.0%	9.1%	18.2%
Offer flexible payment schedules	6.1%	9.1%	4.5%
Offer new process efficiencies to reduce costs	3.0%	9.1%	9.1%
Provide law firm associate(s) to the department at no charge	3.0%	0.0%	4.5%
Sit in on company meetings as advisor at no charge	0.0%	4.5%	0.0%

Law Firm COVID Assistance – Value

COVID-19

For each of those actions offered proactively by law firms to assist your law department, did the action deliver value?



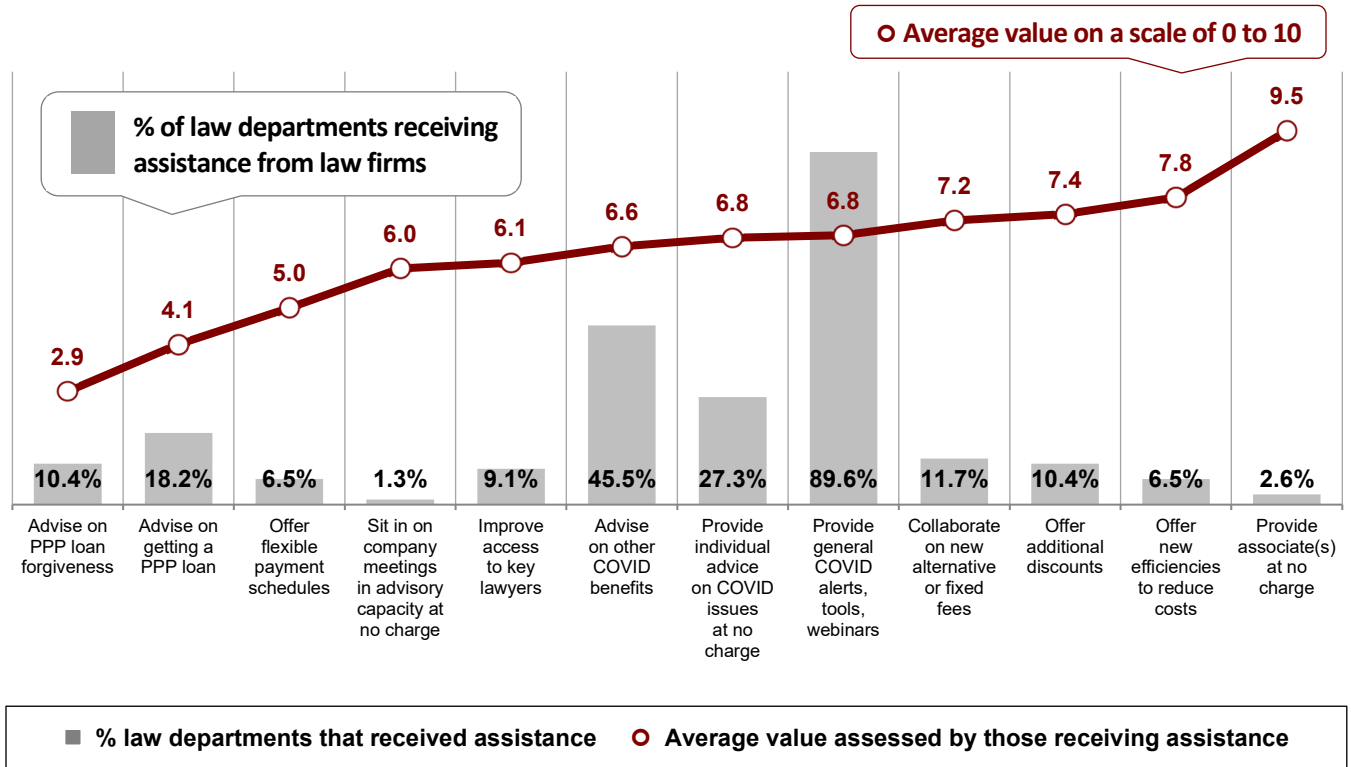
COMMENT

In general, the information provided by most law firms in general alerts or daily updates was too vague and generic. Law firms really could have distinguished themselves with better, more practical information.

Law Firm COVID Assistance – Comparison of Activity and Value

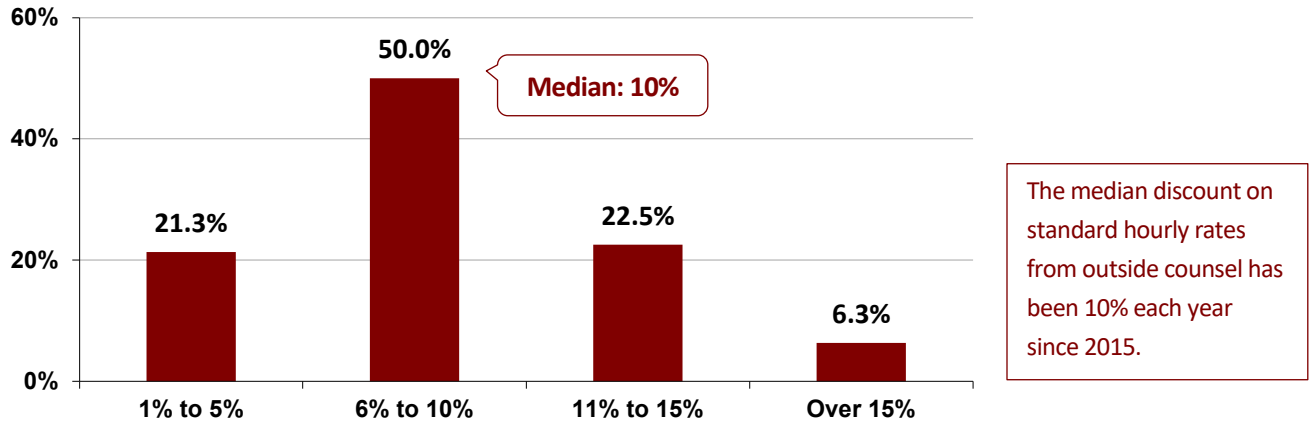
COVID-19

This chart combines findings from the two prior questions. Each gray bar shows the percentage of law departments that received assistance from law firms for the specified tactic. Data points on the red line show the average value law departments assigned to the tactic on a scale of 0 (no value) to 10 (great value).

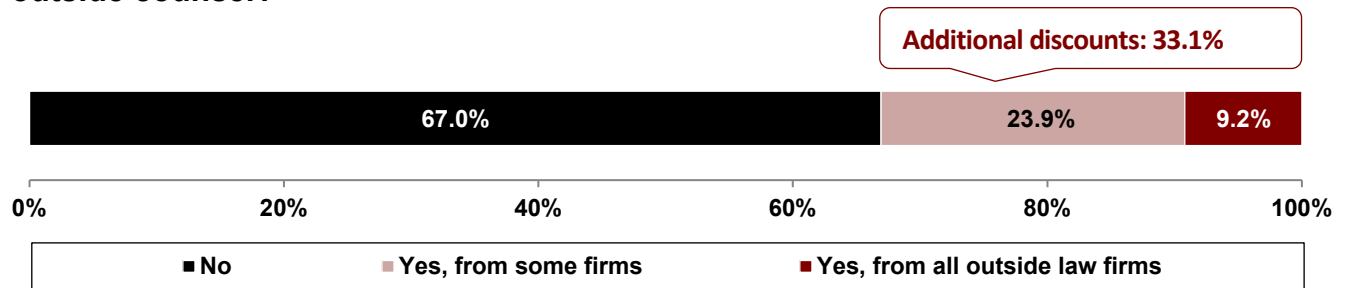


Outside Counsel Rates 2020

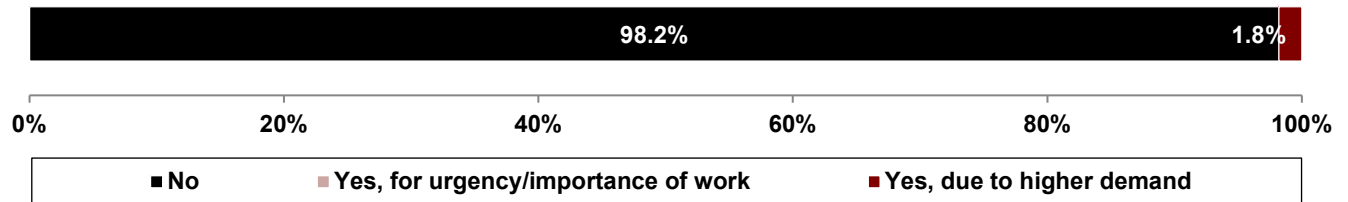
If you received discounts on standard hourly rates from outside counsel in the last 12 months, what was the average price reduction received?



As a result of the COVID-19 crisis, have you asked for additional discounts from outside counsel?

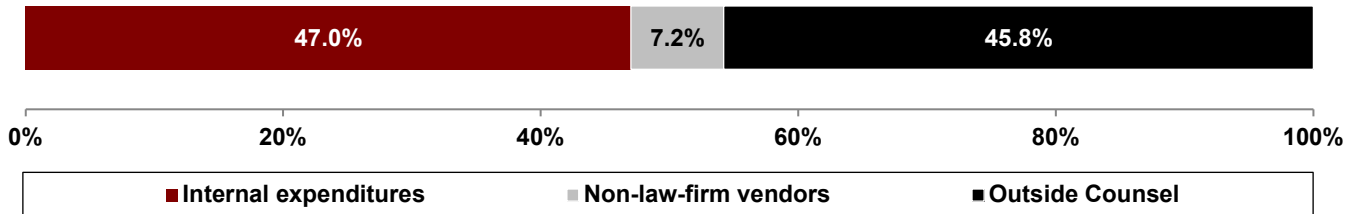


As a result of the COVID-19 crisis, have you paid higher hourly rates to outside counsel for selected matters than you have in the past?



Law Department Budget Allocation 2020

Please estimate the percentage of your total 2020 Law Department budget (internal and external legal spend) that each of the following components comprise. (Responses must equal 100%.)



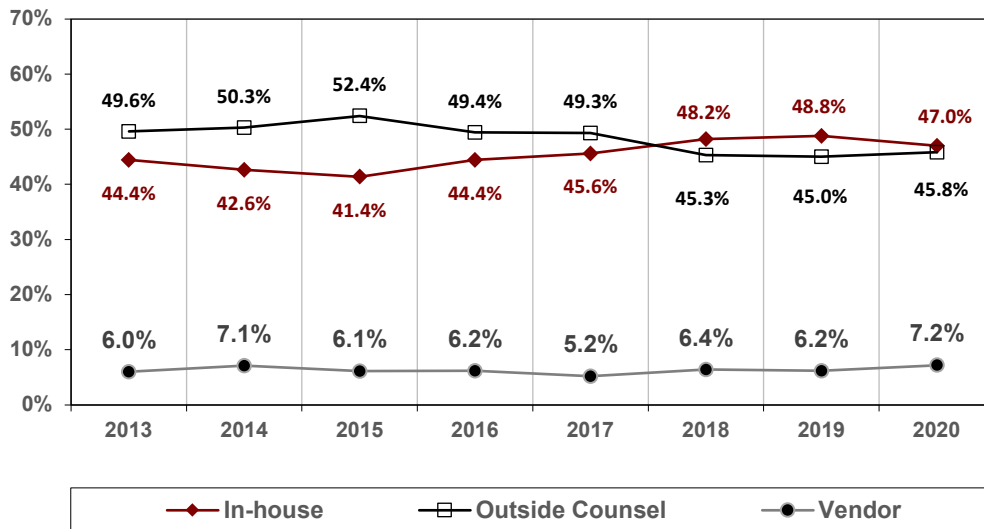
Definitions:

Internal expenditures: e.g., Department compensation and benefits; contract lawyers, facilities, technology and other operating costs

Non-Law-Firm Vendor: Expenditures for legal matters, e.g., e-discovery, document review, due diligence, legal research, etc.

Outside Counsel: Total expenditures to outside law firms

TREND

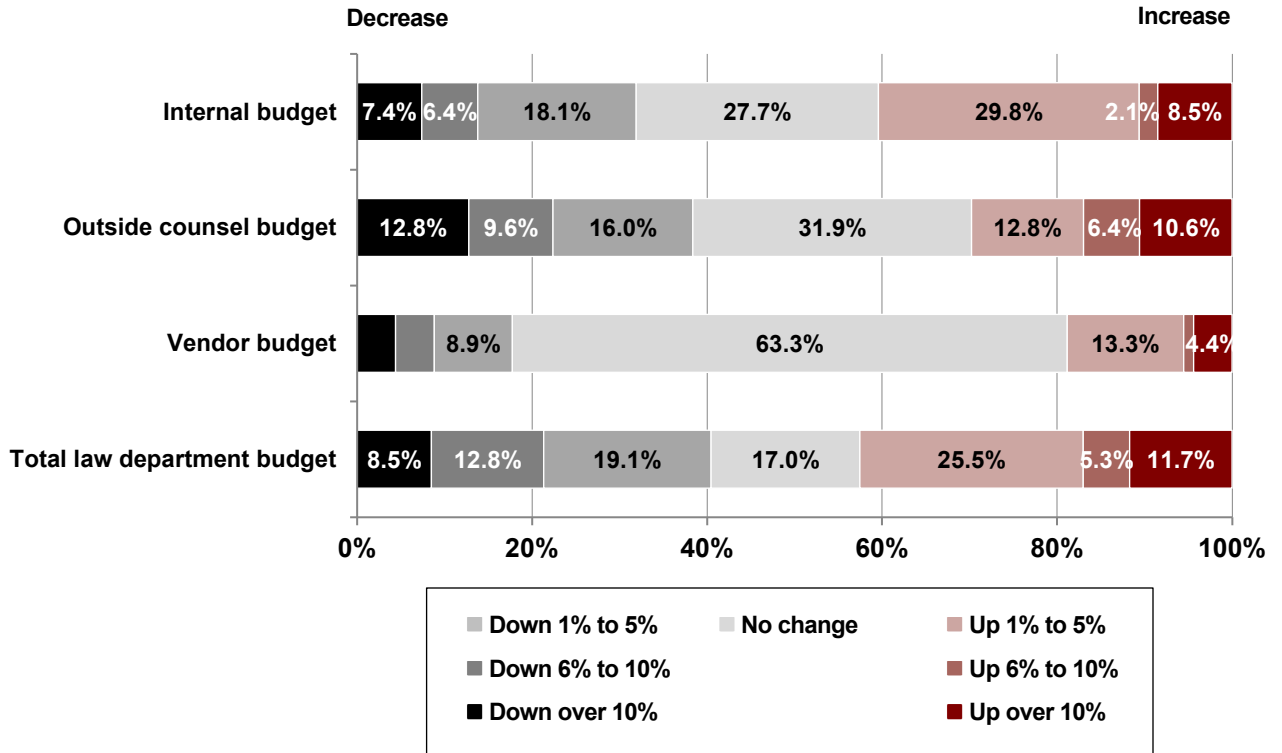


Although allocations remain largely stable, in-house spend as a percentage of total spend exceeded outside counsel spend for the third year. Vendor spend grew slightly.

Trend data compiled from the 2013 - 2020 Chief Legal Officer Surveys.

Law Department Budget Changes – 2019 to 2020

Please estimate the percentage increase or decrease in your Law Department budget from 2019 to 2020.



BUDGET CHANGE 2019 TO 2020:

ALL DEPTS.	% Depts. – Decreased	% Depts. – No change	% Depts. – Increased
Internal	31.9%	27.7%	40.4%
Outside counsel	38.4%	31.9%	29.8%
Vendor	17.7%	63.3%	18.8%
Total	40.4%	17.0%	42.5%

Law Department Budget Changes 2019 to 2020 – By Department Size

INTERNAL BUDGET:

Department Size	% Depts. – Decreased	% Depts. – No change	% Depts. – Increased
1-10 lawyers	27.5%	27.5%	45.0%
11-50 lawyers	25.9%	37.0%	37.0%
51+ lawyers	44.4%	18.5%	37.0%

OUTSIDE COUNSEL BUDGET:

Department Size	% Depts. – Decreased	% Depts. – No change	% Depts. – Increased
1-10 lawyers	50.0%	27.5%	22.5%
11-50 lawyers	14.8%	51.9%	33.3%
51+ lawyers	44.4%	18.5%	37.0%

VENDOR BUDGET:

Department Size	% Depts. – Decreased	% Depts. – No change	% Depts. – Increased
1-10 lawyers	15.4%	69.2%	15.4%
11-50 lawyers	7.7%	65.4%	26.9%
51+ lawyers	32.0%	52.0%	16.0%

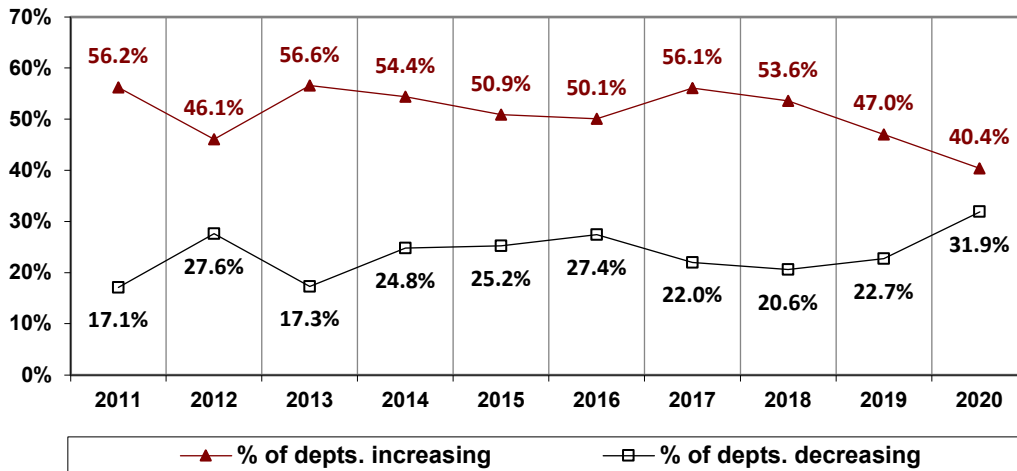
TOTAL BUDGET:

Department Size	% Depts. – Decreased	% Depts. – No change	% Depts. – Increased
1-10 lawyers	52.5%	12.5%	35.0%
11-50 lawyers	22.2%	29.6%	48.1%
51+ lawyers	40.7%	11.1%	48.1%

TREND: Change in Law Department Budget 2019 to 2020

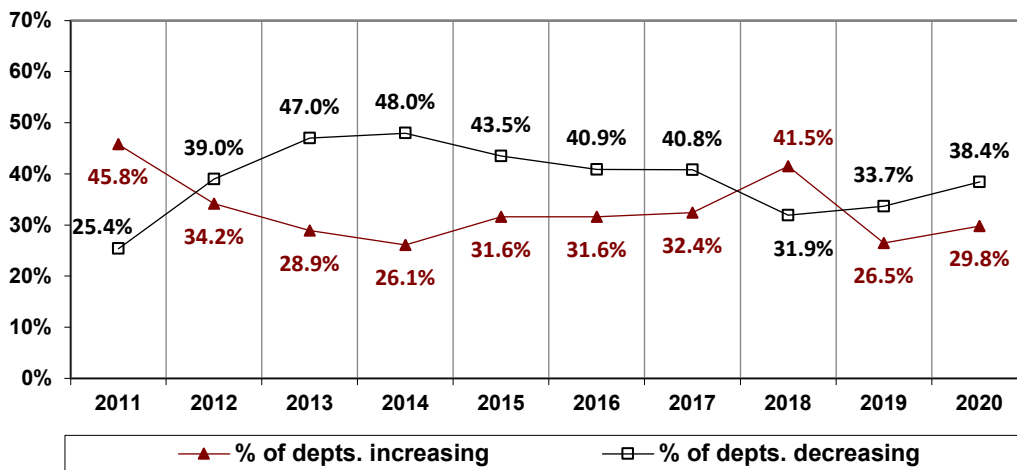
Charts show what percentage of departments increased their budget, and what percentage decreased their budget in each category. The balance of departments, to total 100%, made no change in the budget category and is omitted in each of these charts.

INTERNAL BUDGET



The number of law departments increasing in-house budgets is at a ten-year low, while the percentage of those making cuts hit a record high.

OUTSIDE COUNSEL BUDGET



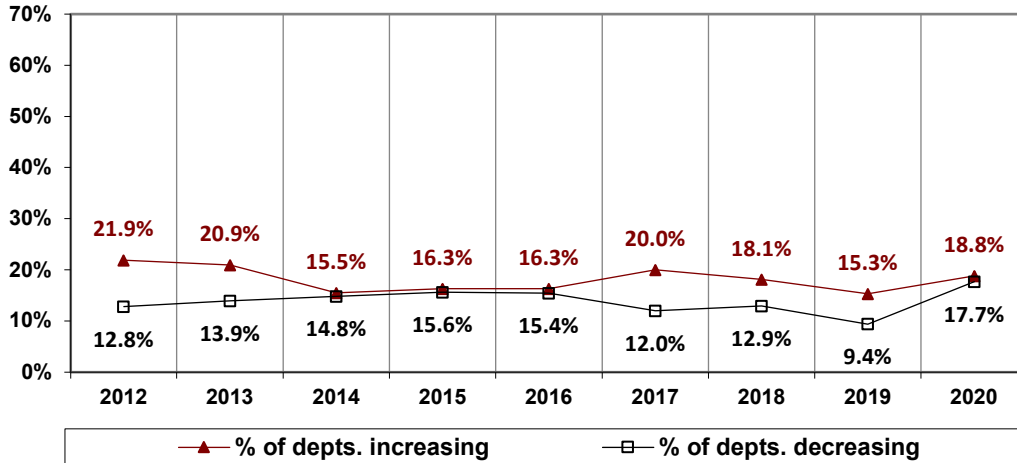
The number of law departments cutting law firm spend rose for a second year after a dip in 2018, and again outpaced those departments making increases.

Trend data compiled from 2011 - 2020 Chief Legal Officer Surveys.

TREND: Change in Law Department Budget 2019 to 2020

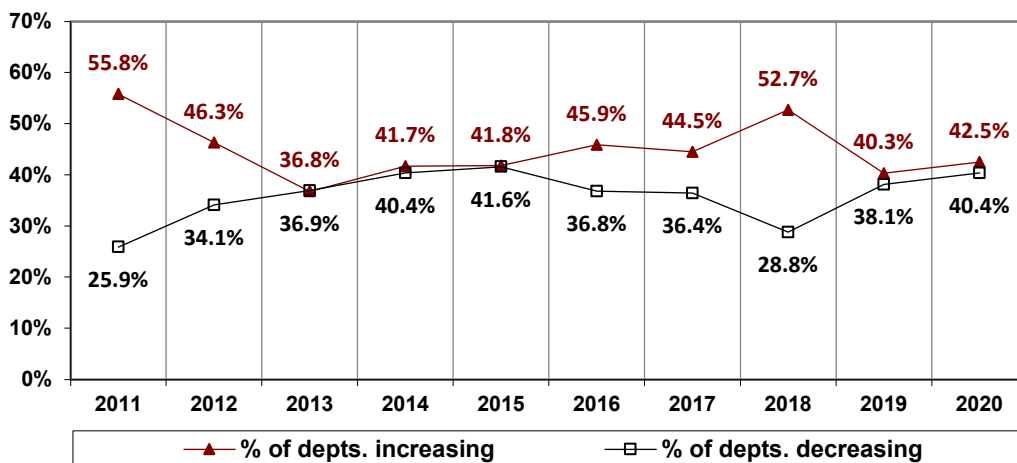
Charts show what percentage of departments increased their budget, and what percentage decreased their budget in each category. The balance of departments, to total 100%, made no change in the budget category and is omitted in these charts.

VENDOR BUDGET



Although vendor spend typically shows the least volatility, there was a meaningful bump in the number of law departments making cuts in 2020.

TOTAL BUDGET



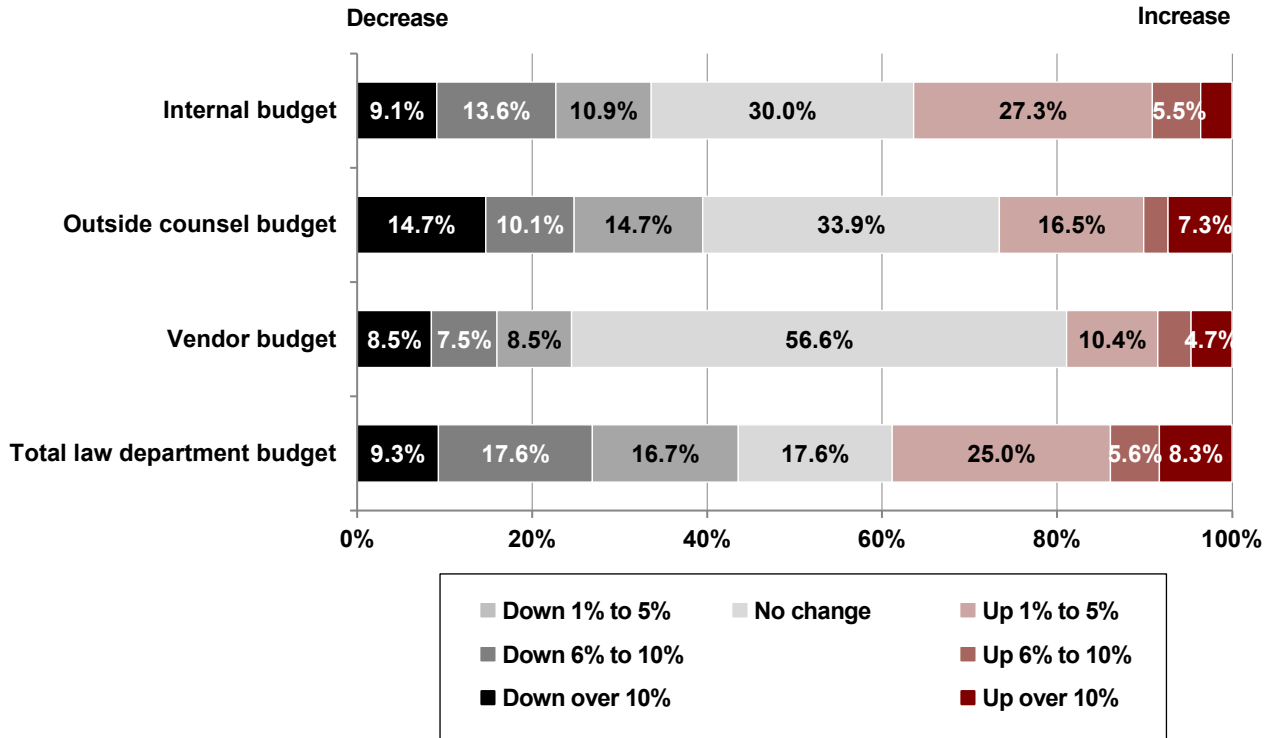
After three years in which departments increasing total spend exceeded those making decreases, the numbers have converged again.

Trend data compiled from 2011 - 2020 Chief Legal Officer Surveys.

Law Department Spend Planned for 2021

OUTLOOK 2021

For fiscal year 2021, please estimate the change you have made / will make in law department spend.



PLANNED SPEND 2021:

ALL DEPTS.	% Depts. – Decreased	% Depts. – No change	% Depts. – Increased
Internal	33.6%	30.0%	36.4%
Outside counsel	39.5%	33.9%	26.6%
Vendor	24.5%	56.6%	18.9%
Total	43.6%	17.6%	38.9%

Planned Spend for 2021 – By Department Size

OUTLOOK 2021**INTERNAL BUDGET:**

Department Size	% Depts. – Decreased	% Depts. – No change	% Depts. – Increased
1-10 lawyers	34.0%	23.4%	42.5%
11-50 lawyers	23.5%	32.4%	44.1%
51+ lawyers	44.8%	37.9%	17.2%

OUTSIDE COUNSEL BUDGET:

Department Size	% Depts. – Decreased	% Depts. – No change	% Depts. – Increased
1-10 lawyers	37.0%	30.4%	32.6%
11-50 lawyers	38.3%	41.2%	20.6%
51+ lawyers	44.7%	31.0%	24.1%

VENDOR BUDGET:

Department Size	% Depts. – Decreased	% Depts. – No change	% Depts. – Increased
1-10 lawyers	24.4%	55.6%	20.0%
11-50 lawyers	9.4%	65.6%	25.0%
51+ lawyers	41.3%	48.3%	10.3%

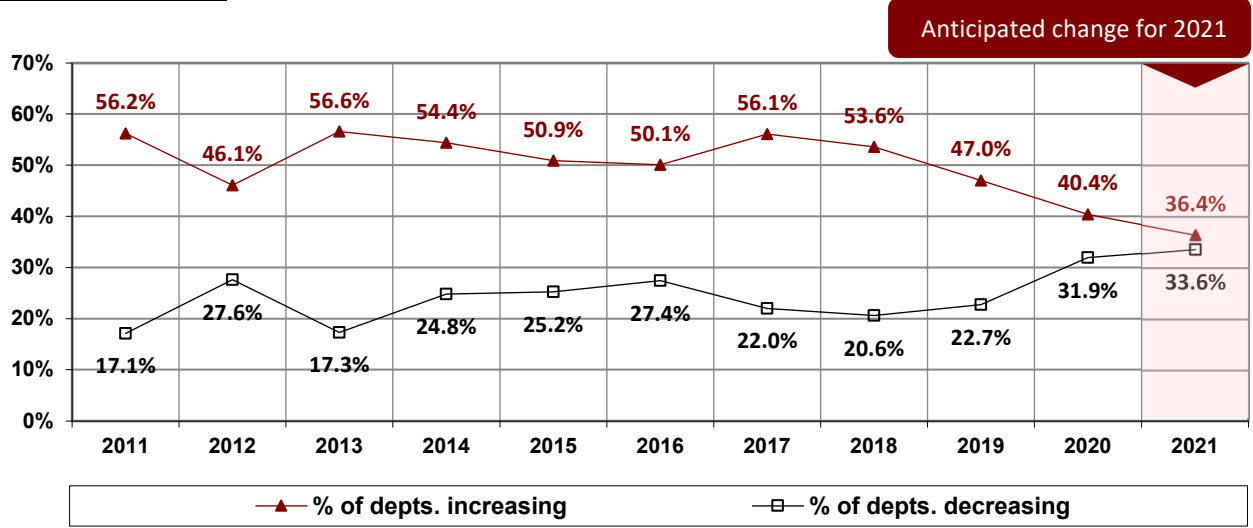
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51+ lawyers	53.3%	13.3%	33.4%

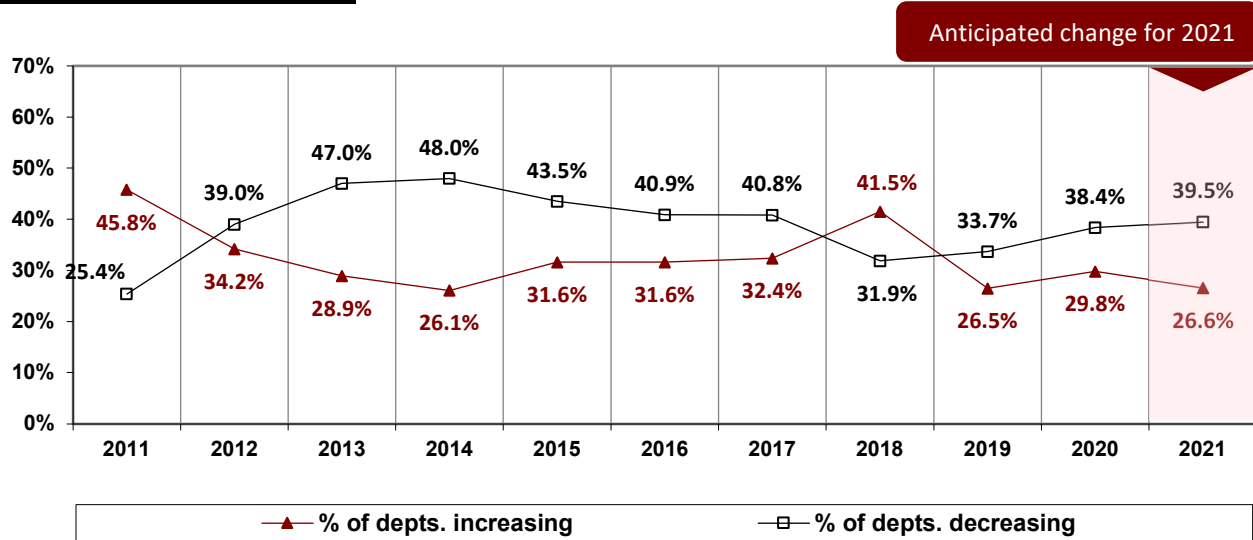
TREND: Actual Budget Change 2011-2020 and Planned Spend 2021

Charts show what percentage of departments increased their budget, and what percentage decreased their budget in each category for each year through 2020. To that trendline, we've added law departments' anticipated budget changes for 2021.

INTERNAL BUDGET



OUTSIDE COUNSEL BUDGET

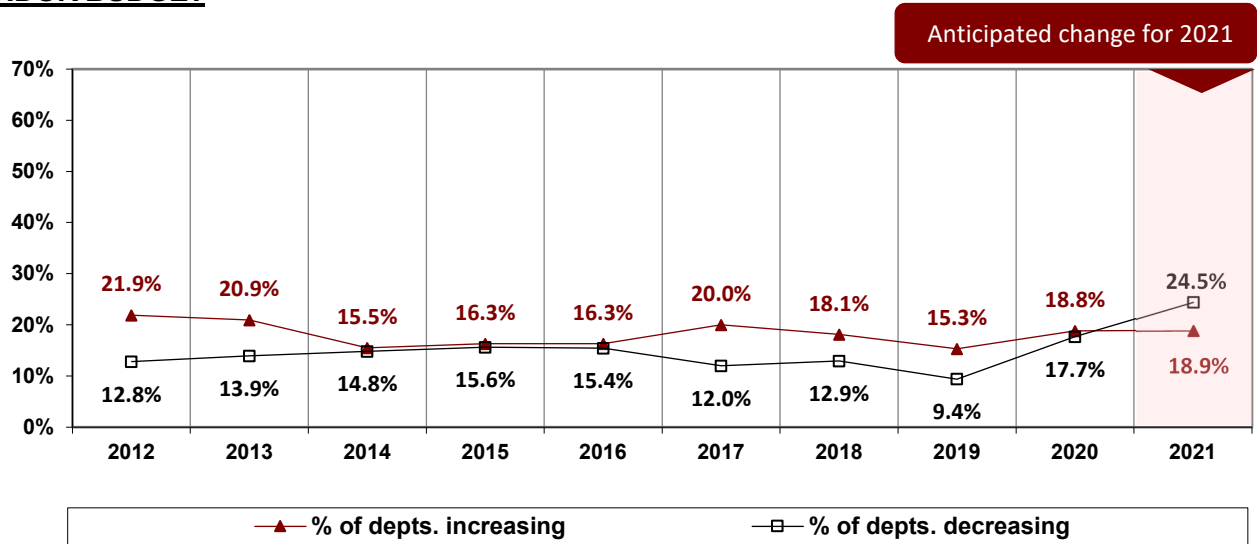


Trend data compiled from 2011 - 2020 Chief Legal Officer Surveys.

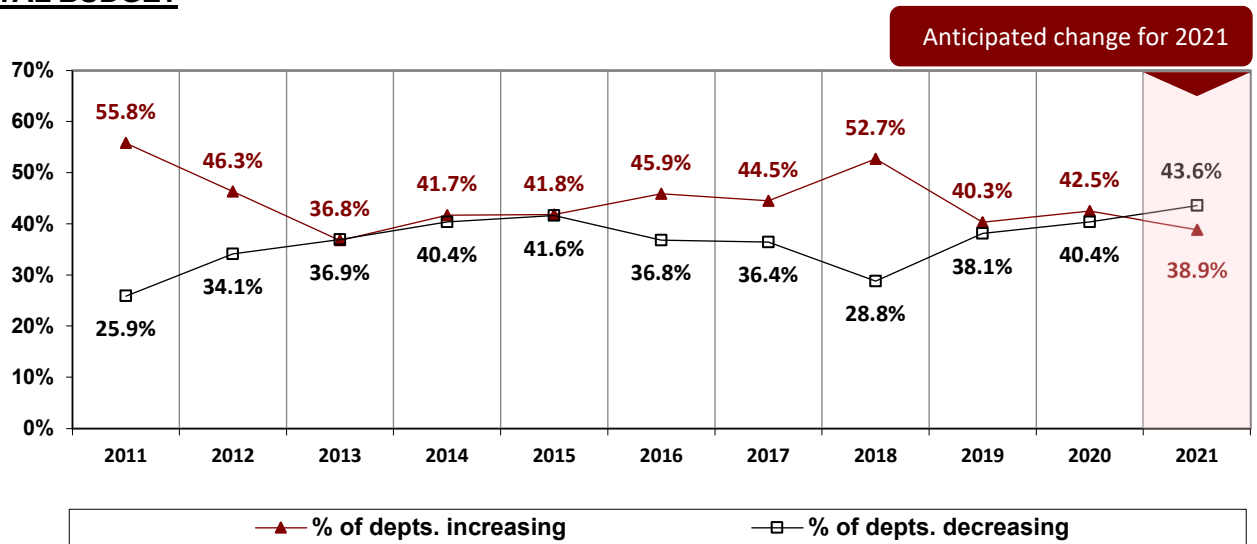
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VENDOR BUDGET



TOTAL BUDGET

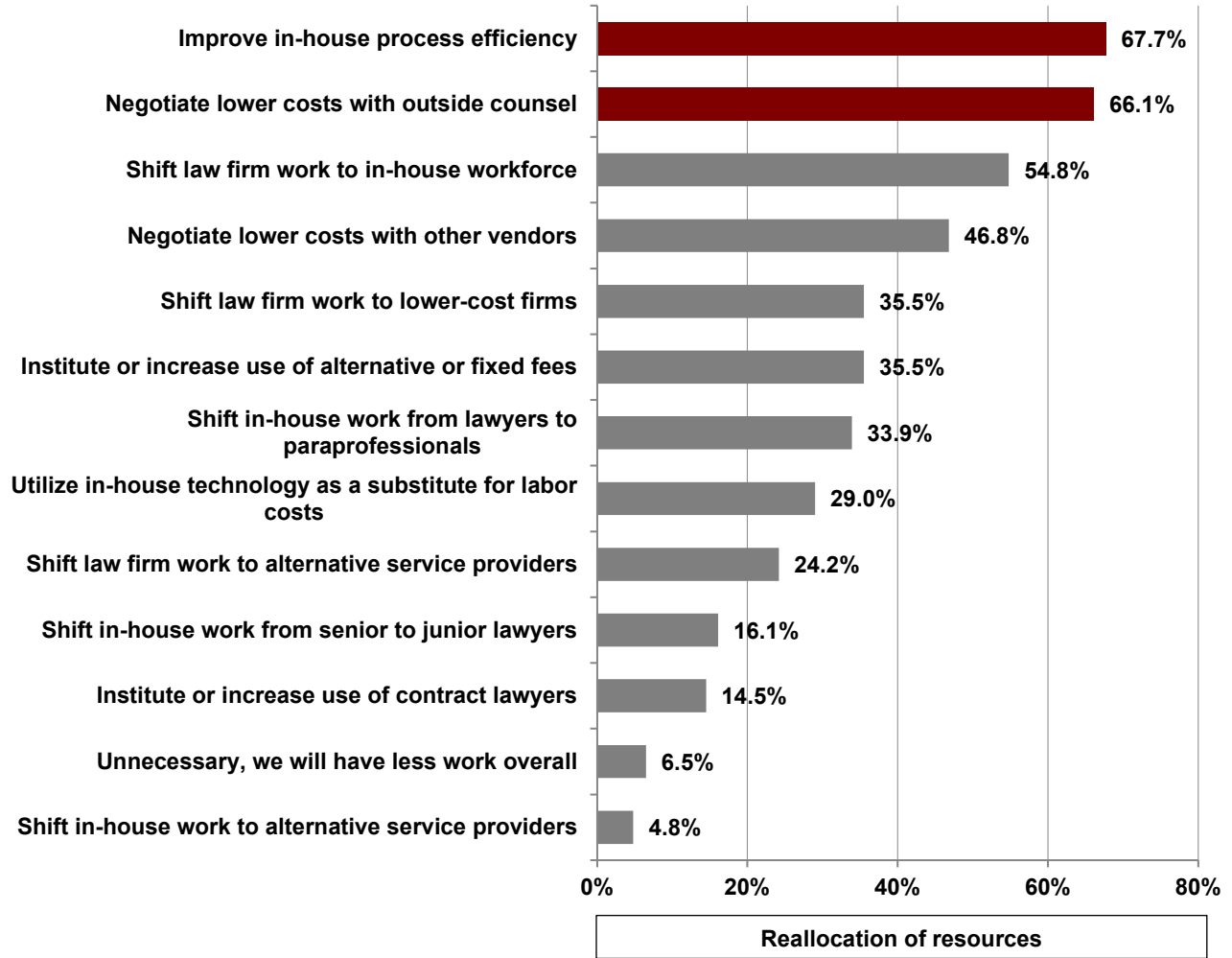


Trend data compiled from 2011 - 2020 Chief Legal Officer Surveys.

Reallocation of Law Department Resources

OUTLOOK 2021

If you plan to decrease your law department spend (internal and/or external) in the next 12 months, how will you reallocate your resources to cover your overall workload? (Check all that apply.)



OTHER

In-source some non-law firm vendor work

Keep vacancies vacant

Less staff

Only focusing on necessary work. All other work is on hold.

Reduce law firm services due to smaller litigation docket

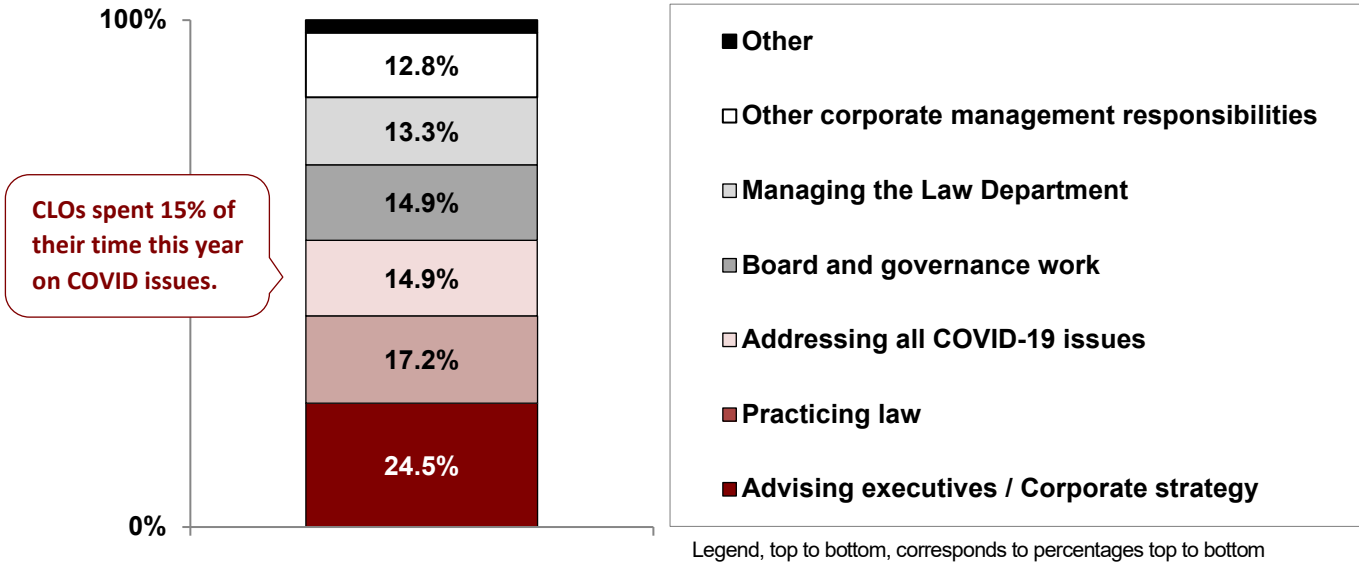
Reallocation of Law Department Resources – By Department Size

If you plan to decrease your law department spend (internal and/or external) in the next 12 months, how will you reallocate your resources to cover your overall workload? (Check all that apply.)

	1-10 lawyers	11-50 lawyers	51 lawyers or more
Improve in-house process efficiency	57.1%	71.4%	80.0%
Negotiate lower costs with outside counsel	60.7%	64.3%	75.0%
Shift law firm work to in-house workforce	64.3%	50.0%	45.0%
Negotiate lower costs with other vendors	46.4%	21.4%	65.0%
Shift law firm work to lower-cost firms	32.1%	42.9%	35.0%
Institute or increase use of alternative or fixed fees	32.1%	35.7%	40.0%
Shift in-house work from lawyers to paraprofessionals	21.4%	42.9%	45.0%
Utilize in-house technology as a substitute for labor costs	28.6%	21.4%	35.0%
Shift law firm work to alternative service providers	21.4%	28.6%	25.0%
Shift in-house work from senior to junior lawyers	17.9%	14.3%	15.0%
Institute or increase use of contract lawyers	17.9%	14.3%	10.0%
Unnecessary, we will have less work overall	7.1%	7.1%	5.0%
Shift in-house work to alternative service providers	3.6%	7.1%	5.0%

The Chief Legal Officer Position

Please estimate how your time was allocated over the last 12 months.
(Responses must equal 100%.)



Other corporate management responsibilities is defined for this question as: “Compliance, HR, Security, etc.”

OTHER (representative comments)

Acquisitions

Collaborating with cross-functional colleagues on regulatory matters

Diversity & Inclusion and anti-racism initiatives

External communications

Government relations-Political issues

Head of Global Real Estate

Legislative developments

Litigation, claims, and anti-fraud oversight

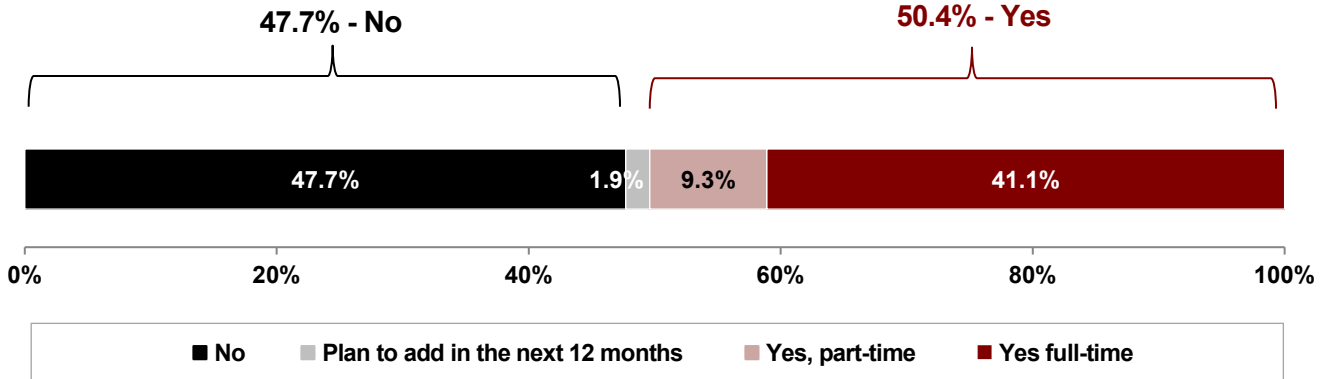
Managing non-legal functions

Public company matters

Talent strategy

Law Department Operations Managers

Do you have an administrator or other business manager who manages law department operations?



BY DEPARTMENT SIZE: Department has an operations manager

	No	Plan to	Yes Part-Time	Yes Full-Time
1 lawyer	100%	0.0%	0.0%	0.0%
2-10 lawyers	55.3%	2.6%	15.8%	26.3%
11-50 lawyers	50.0%	3.1%	9.4%	37.5%
51+ lawyers	20.7%	0.0%	3.4%	75.9%

BY YEAR: Department has an operations manager

	No	Plan to	Yes
2016	64.0%	2.7%	33.3%
2017	59.3%	3.7%	37.1%
2018	56.0%	4.9%	39.1%
2019	50.9%	3.2%	45.9%
2020	47.7%	1.9%	50.4%

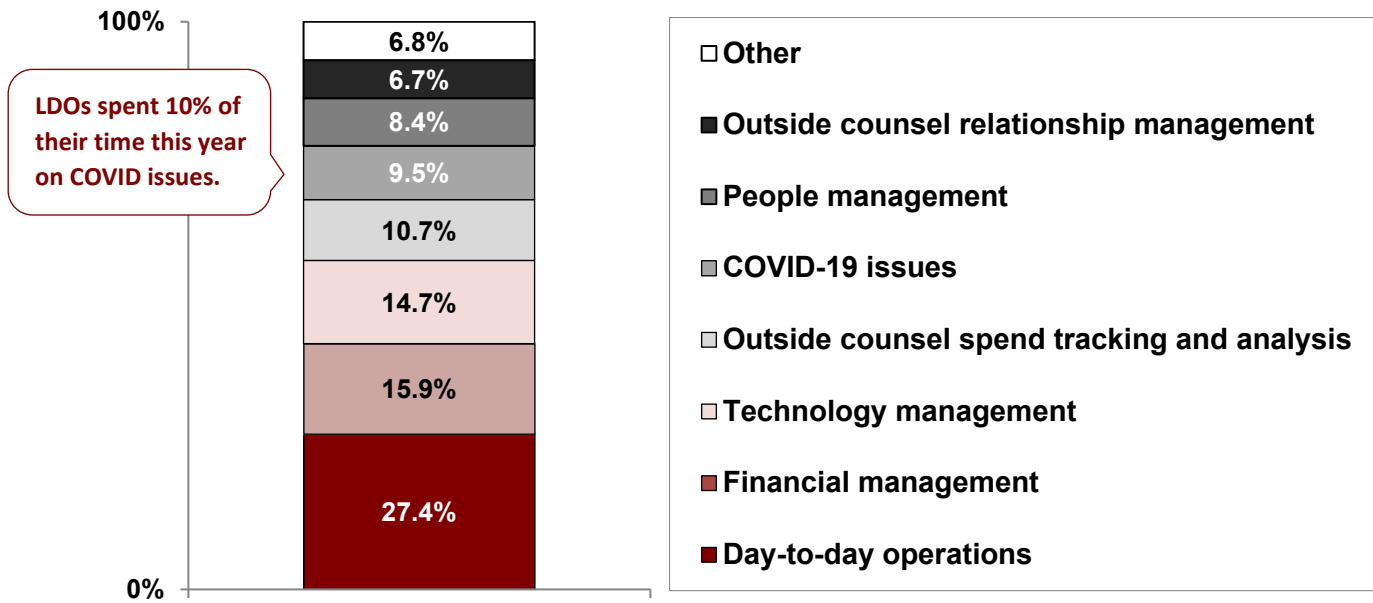
The number of departments that have chief administrators continues to climb each year.

Law Department Operations Managers

FOLLOW-UP QUESTION...

Asked of the 50.4% of departments that employ a Law Department Operations Manager (including full-time and part-time administrators).

Please estimate the percentage of time your law department operations manager spends on each of the following functions.



Legend, top to bottom, corresponds to percentages top to bottom

OTHER (representative comments)

Acquisitions due diligence

Contract management

Diversity

Overseeing litigation and substantive issues

Patents

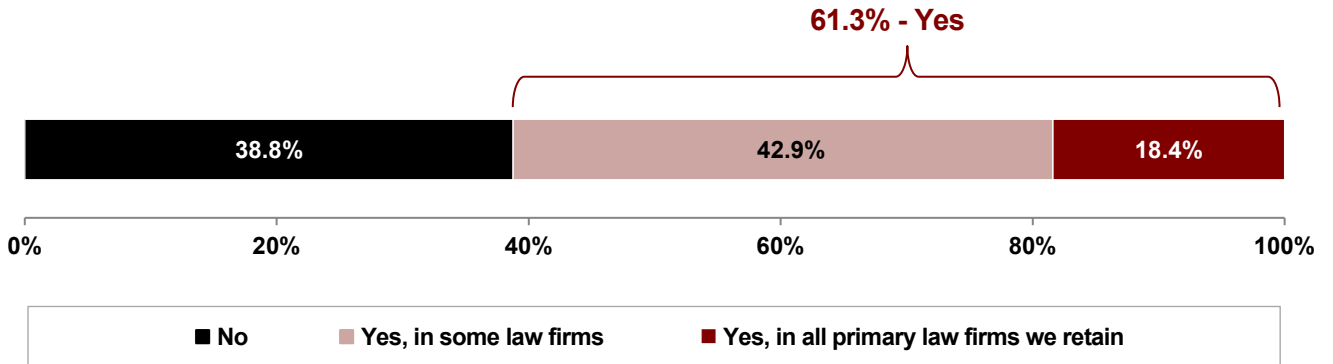
Records management

Security

Strategic planning

Law Department Operations – Collaboration with Outside Counsel

Does your law department operations manager/team have collaborative working relationships with operational professionals (e.g., pricing, project management, data analysis professionals) in your outside law firms?

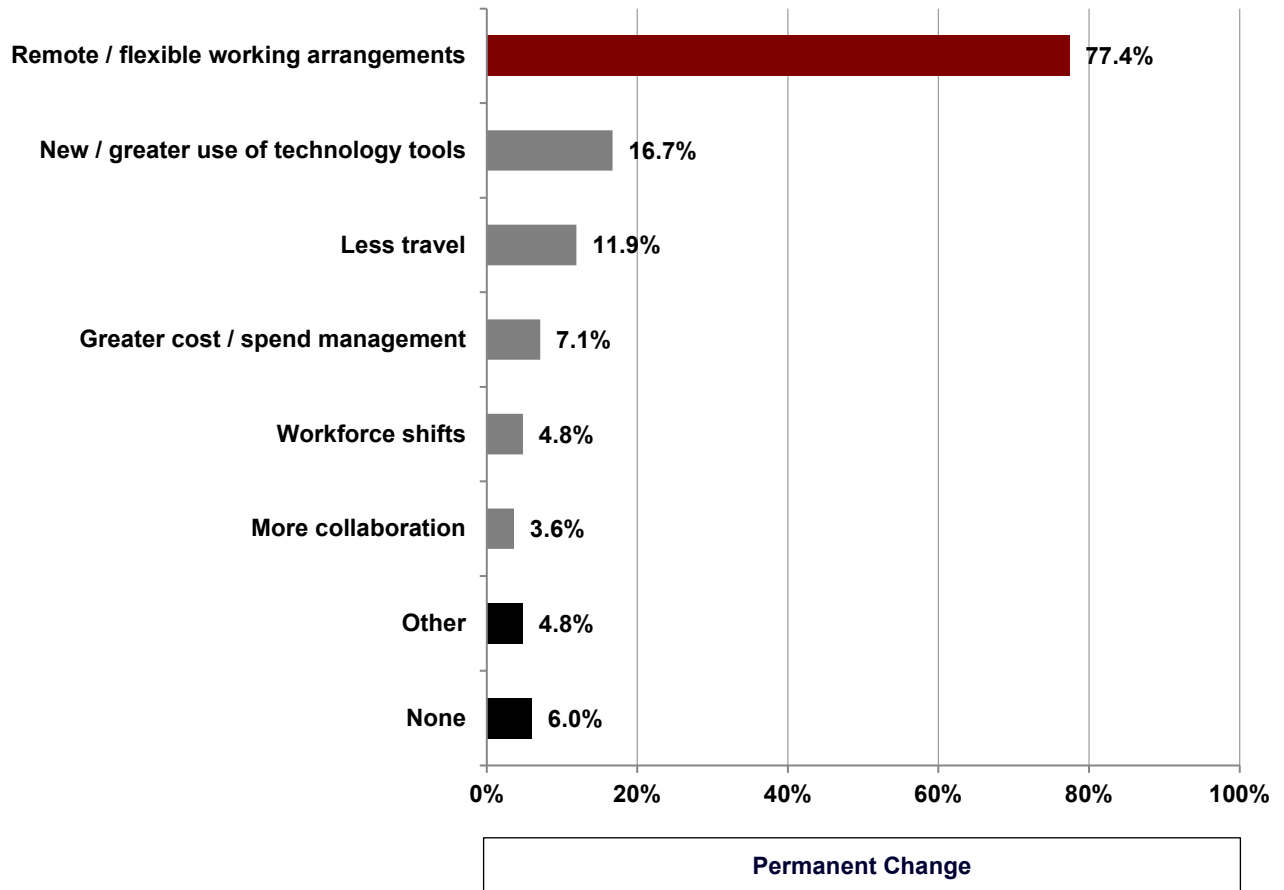


COVID and Permanent Change

COVID-19

Of the changes to your law department that have arisen from the COVID-19 crisis, which if any do you think will become permanent post-pandemic?

We categorized free-text responses for the following chart:



COVID and Permanent Change

COVID-19

Of the changes to your law department that have arisen from the COVID-19 crisis, which if any do you think will become permanent post-pandemic?

We categorized free-text responses and have included a selection of comments:

Remote / flexible working arrangements

Working remotely will become much, much more frequent, which may have other implications including allocation of office space and investment in IT equipment and software to facilitate working remotely and in a "paperless" environment.

Remote arbitration, mediation, and standard court appearances, likely some oral arguments and remote depositions.

I believe that many of our lawyers will continue to work remotely - at least two-thirds of their time working will be remote.

Remote work will be become more common for law department staff, likely on a part-time basis.

Flexible work hours / less time in the office unless absolutely needed.

Less face to face interaction and more remote working.

Working from home and advising clients via electronic means.

New / greater use of technology tools

Use of video technology for meetings.

More use of video conferencing for both internal meetings and for hearings/negotiations with outside parties.

Greater use of technology like digital signatures and contracts management software.

Utilizing technology like contract AI to assist with workload.

More tech available from the company to personnel working from home.

COVID and Permanent Change

COVID-19

Of the changes to your law department that have arisen from the COVID-19 crisis, which if any do you think will become permanent post-pandemic?

We categorized free-text responses and have included a selection of comments:

Less travel

Considerably less travel expense, even once travel restrictions are lifted.

Less or no travel.

Greater cost / spend management

Downward pressure on budget and external counsel fees

Holding the line on reduced budgets

Greater fixed fee relationships

More RFPs

There is some work that will simply not be done because we have determined it is not delivering overall value to the company and that the business can manage.

Workforce shifts

Less administrative staff

More reliance on contract lawyers

Bringing more work in-house

Fewer outside firms

COVID and Permanent Change

COVID-19

Of the changes to your law department that have arisen from the COVID-19 crisis, which if any do you think will become permanent post-pandemic?

We categorized free-text responses and have included a selection of comments:

More collaboration

Collaborating cross-functionally

More frequent group communications

Other

More work relating to the shift to e-commerce from bricks-and-mortar retail.

Environmental Health & Safety training and constant monitoring of risks associated with pandemics.

Mitigation and monitoring of possible COVID-related claims and lawsuits.

None

None. I do not foresee an appetite for an increase in remote working.

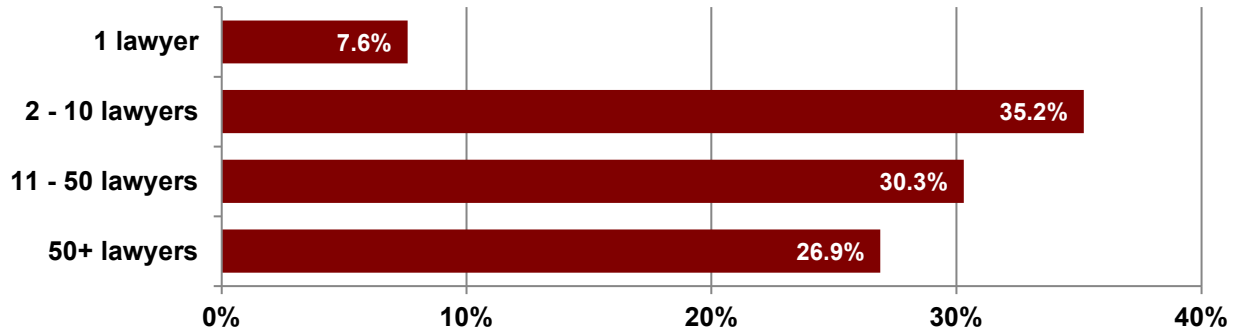
There have been no changes to our law department as a result of COVID-19.

2020
Chief Legal Officer Survey
Participant Demographics



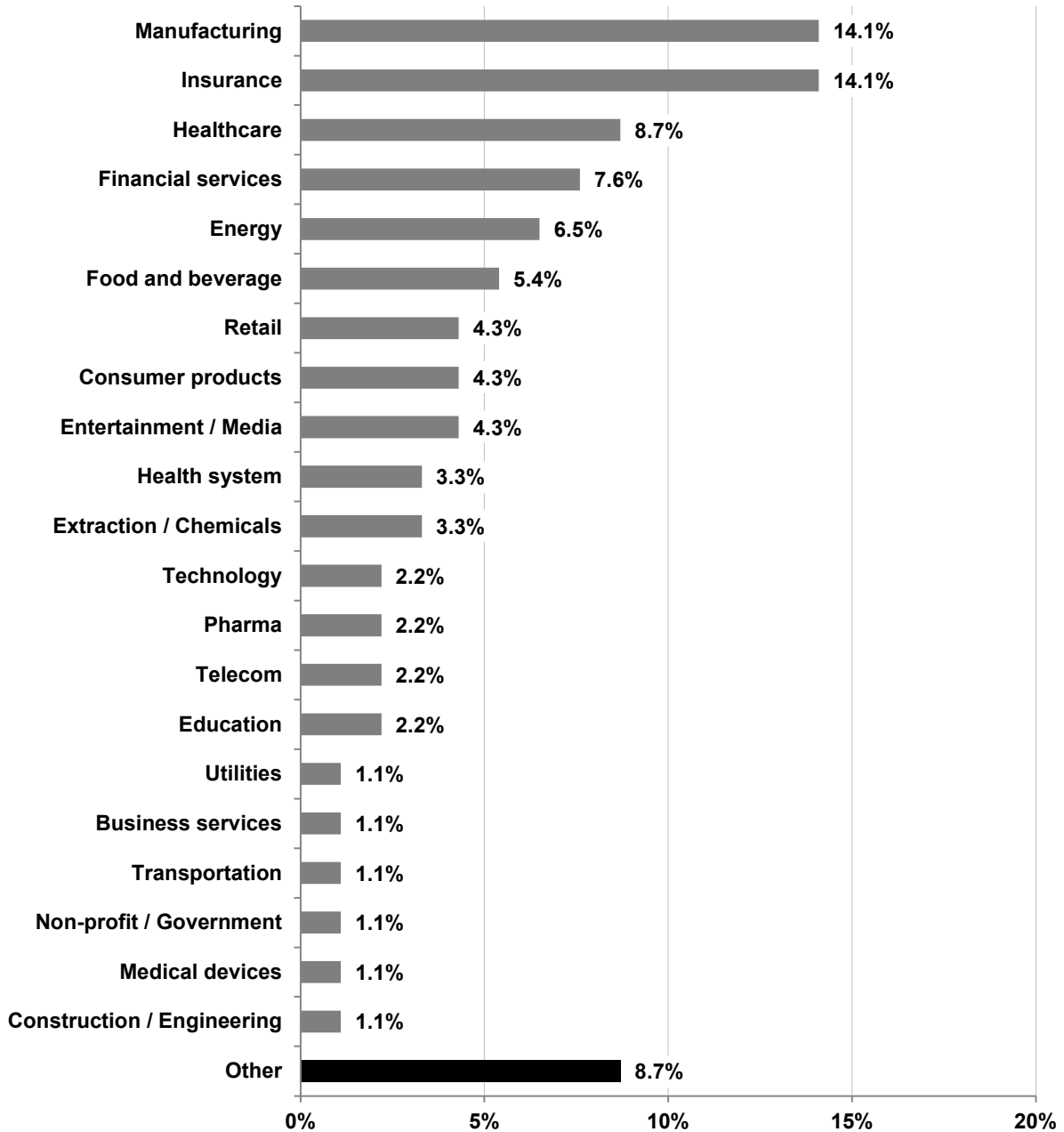
Law Department Demographics – Lawyers

How many lawyers are in your department (in all locations)?



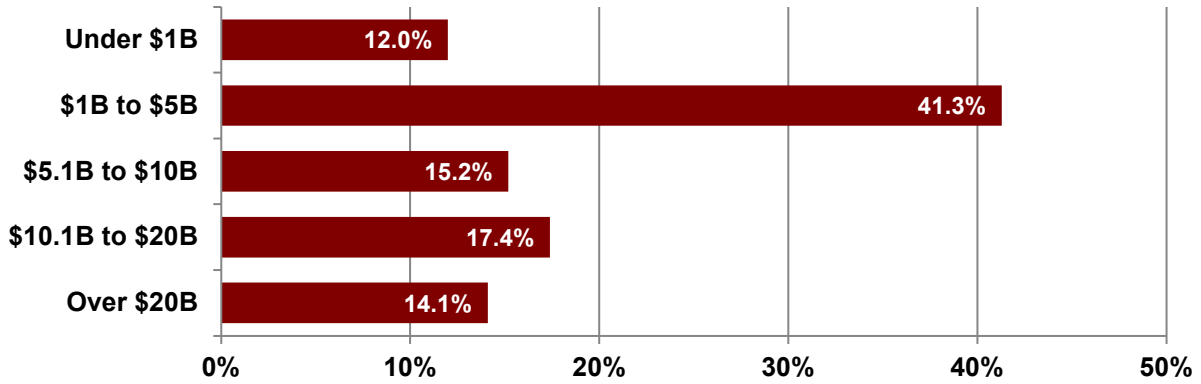
Law Department Demographics – Industry

What is your organization’s primary industry?

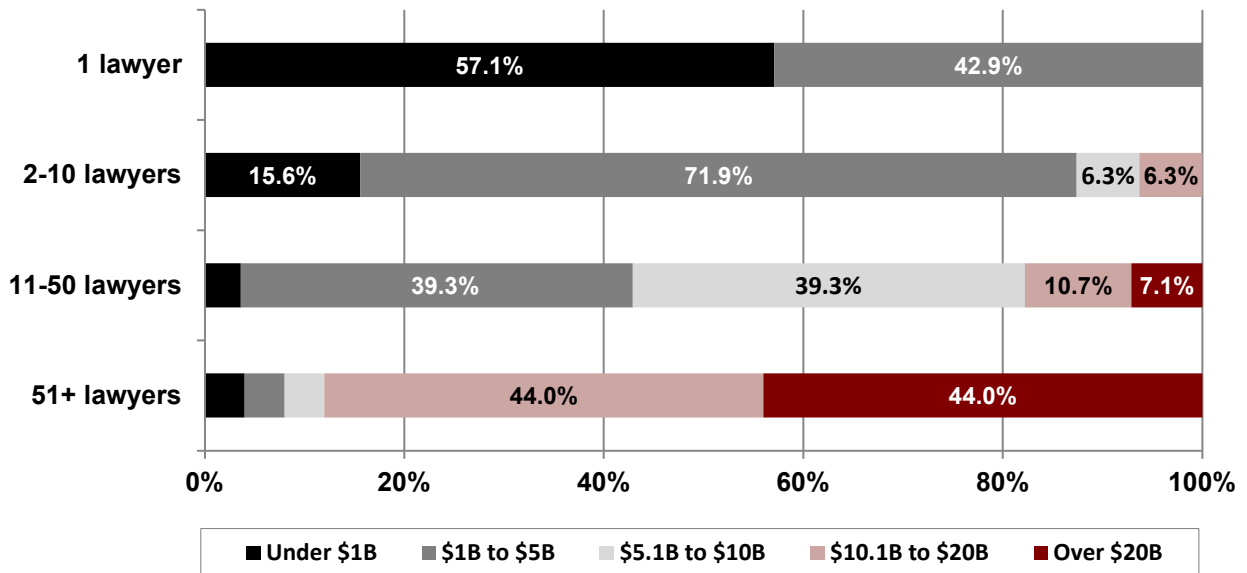


Law Department Demographics – Organization Revenue

What were your organization’s annual revenues in fiscal year 2019?



ANNUAL REVENUE BY DEPARTMENT SIZE:



Law Department Demographics – Average Total Legal Spend

What was your law department's total legal spend in 2019 (inside and outside, including all legal costs borne by the department)?

