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EBOOK ONE

How to Build a

Board-Level Legal Scorecard

One page. Five questions. Eight numbers.

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WHAT'S INSIDE

Seven short chapters, one designed page.

CHAPTER 1

Volume Isn't Value

I have spent my career around two rooms.

Leading sales, I was in the boardroom often, presenting to the board and the executive team, showing them where we stood. I know what a room does with a slide full of metrics, and I know the moment it quietly stops listening.

The other room is legal. For years I sold the systems legal teams run on. In one role I ran a business unit where the contract team reported to me, close enough to watch how a legal function measures itself, and to run our own work past the lawyers next door. Put the two rooms together and the problem is easy to see.

Picture legal's slot on the board agenda. Someone shows a slide. Matters opened, up. Requests received, up. Spend under management, up. Every arrow points the right way. And somewhere around the second bullet, the room drifts. Nobody says it, but the question hanging over the slide is the one question the numbers do not answer: is any of this good?

That is the problem this book fixes.

The number that means two opposite things

Take the one everybody reports: requests received, up thirty percent.

Read it one way, it is a win. The business trusts legal more, brings you in earlier, stops signing things without you. Read it the other way, it is a warning. Work is arriving faster than you can clear it, the queue is growing, and the business is quietly slowing down because of it.

Same number. Opposite stories. Opposite moves. The count on the slide cannot tell you which, or what to do about it.

> ***Same number. Opposite stories. Opposite moves.***

Activity reporting measures motion and calls it performance. Motion is easy to count, so it is what gets counted. Legal walks into the most important room in the company with a slide that shows how busy the team is, and that slide answers none of the questions the board is asking.

> ***Volume is not value.***

What a Scorecard does instead

A Scorecard does not count more things. It answers the question behind the count. It takes “requests received, up thirty percent” and turns it into something a board can act on: are we keeping pace, or falling behind? It moves you off the easy question, how much are we doing, and onto the one that matters, how well are we doing, and what do we do next.

That shift, from activity to answers, is the whole idea. Everything else in this book is how you build it.

Three ideas hold it up

- **Data is King.** A Scorecard is only as good as the data behind it, and no software hands you that data ready to use. Even directionally correct takes a deliberate choice about how your data is captured and stored. That is why a full chapter of this short book is about the data, not the metrics. Get the data wrong and the best-designed number on the page is a confident lie.
- **AI is Queen.** The most powerful piece on the board. AI reads the numbers, connects them, and tells you where to look first. But a Queen's power comes from her position, and on this board the position is the data. Strong data, strong play. Thin data, and even the Queen can do little. The two work together: the data sets what is true, the Queen makes the most of it. She never claims more certainty than the data can support.
- **Execution wins the game.** Data and AI are pieces. Pieces do not win games. Moves do. So every number on this Scorecard comes paired with the move it triggers. A number that does not change what you do next did not earn its place on the page.

Hold onto that last sentence. It is the rule the whole Scorecard is built on, and it is what separates a Scorecard from one more report nobody acts on.

Five questions, not fifty numbers

The questions do not really change from one board to the next. Underneath every “is this good?” is a short list of things the business needs to know about legal. Five of them. No activity slide answers any.

Those five are the backbone of the Scorecard, so here they are:

- **Are we on top of the whole workload?**
- **Is the business unblocked, and are matters moving?**
- **Are we protected?**
- **Are we growing capacity faster than headcount?**
- **Is spend under control?**

Chapter 4 earns each one, with the number that answers it and the move to make when the answer is bad.

What you will have by the end

By the end you will be able to build the one page you take to your board or CEO. One page that covers the whole department: the requests coming in, the matters moving through, the outside counsel dollars going out. Plain enough that the CFO reads it without a translator. Honest enough that you can stand behind every line.

I will not pretend it is easy. The thinking is simple. The doing takes a deliberate structure for how your data is captured and stored, the integrations to bring it together, and the discipline to act on what the page tells you. No tool does that part for you. This book gives you the thinking. The work is yours. Let's get to it.

CHAPTER 2

What a Board Scorecard Actually Is

I presented numbers to boards and executive teams for years, and one lesson stuck: a room reads a page before it listens to a word about it. The best pages did their work in the first ten seconds. Show where things stand and what is being handled, and you have the room. Make the room hunt for the point, and you have lost them.

Chapter 1 made the case that activity is not value. This chapter is about what replaces the activity slide.

One page you own

A Scorecard is one page. Not a binder, not a stack of reports, not a dashboard someone babysits. One page that covers the whole legal department and tells the reader, at a glance, where the function stands and what needs attention.

The word that carries the weight is own. This is not a report you produce for someone else and hand off. It is the page you run the function by. You look at it before the board does, so when a line is off you already know why and what you are doing about it. By the time it reaches the board, they are seeing what you have been managing all along.

A word on the word board. Most boards see legal through material matters, governance, and the audit committee's view of reserves and disclosures. This page is board-level in a different sense: fit to hand to a director cold, with nobody there to explain it. Day to day it is the CEO's page and the CFO's page, and the executive team runs the function off it. The audit committee will see a subset. Build it to the director standard and it holds up in every one of those rooms.

The whole department, three streams

One page, but it holds everything legal is responsible for. That comes down to three streams:

- **The requests coming in.** The front door: every legal service request the business brings to legal.
- **The matters moving through.** The active work across every practice area: contracts, litigation, IP, employment, all of it.
- **The outside counsel dollars going out.** What you spend with your firms.

Work in, work moving, money out. Leave one off and the page has a blind spot the board will eventually find. A team can be quick at the front door and bleeding money at the firms. It can be under budget and quietly buried in stalled work. Putting all three on one page is what lets you see the function whole instead of one slice at a time.

> ***Start at the front door. It is the one stream you can see cleanly today, and the truest early read on whether the business trusts legal.***

Of the three, the requests coming in are the fastest stream to stand up. Spend is usually the cleanest data you already hold. Start with those two and build out. The front door is the foundation the rest of the page stands on.

A report is read. A Scorecard is run.

A report tells you what happened. It is a record: backward-looking, complete, mostly inert. You read it, file it, and nothing about tomorrow changes.

A Scorecard tells you where you stand and what to do next. Every line is a live reading of the function, paired with the move to make when it slips. You do not file it. You run the function by it.

That is also why it is not a dashboard. A dashboard is built to be watched. It shows everything, all the time, and leaves the reader to decide what matters. That is an operating tool, and a good one, but it is not the board's tool. A Scorecard surfaces the few things that need a decision and stays quiet about the rest.

> ***You read a report. You watch a dashboard. You run a Scorecard.***

The thirty-second read

Here is the test the page has to pass. A board member or your CEO picks it up cold, you are not in the room, and in about thirty seconds they come away with three things:

- **Where the function stands.** On top of the work, or falling behind.
- **What is off.** The one or two lines that need attention right now.
- **What is being done about it.** That the problem is owned and a move is underway.

And the one decision the page is asking for: back the plan, fund the gap, or leave it alone because it is under control. If the reader needs you to walk them through it, the page has not done its job, no matter how good the numbers underneath.

What makes it work

One page. Three streams. Run, not read. Clear in thirty seconds. Three things make each line hold up, and each has a chapter ahead: a single rule that keeps every line honest, the five questions those lines answer, and the data underneath them, where the real work lives. A page this clean does not come out of a tool ready to read. But the shape is simple, and simple is where we start. Next is the one rule that makes every line work.

CHAPTER 3

The Rule That Makes It Work

Sit through enough board meetings and you learn to tell two kinds of numbers apart. One makes the room lean in and act. The other gets a nod and a page turn. The difference was never how clever the number was. The ones that moved a room had two things in common: they could be read cold, with nobody there to explain them, and each came with a move.

That is the rule the page is built on. Two halves, and a number earns its place on your Scorecard only when it clears both. In Chapter 1 I asked you to hold onto one idea, that a number which does not change what you do next did not earn its place. This is where that becomes the rule you build by.

Plain enough to read cold

Every line makes sense to someone outside legal, with no decoding and no footnote. Picture the CFO reading it without you in the room. If the number needs a lawyer to explain it, it is not a board line. It might be a fine operating detail for your team, one that earns a place on the team's own dashboard, but it does not belong on the page the board sees.

This is not dumbing anything down. A line a director takes in cold keeps them on the decision. A line they puzzle over spends the one thing you cannot get back in that room: their attention. Say it the way you would to a smart person who does not do your job.

Every number carries its move

Every line comes in the same shape:

- **The metric.** What you are measuring, in plain words.
- **What good looks like.** The mark that shows at a glance whether the number is healthy.
- **If it's off, the move.** The specific thing you do when it slips.

That last part is the test. If you cannot name the move, the line does not belong. A number with no move is trivia. It fills space and trains the room to treat the page as something to discuss instead of act on. Name the move or cut the line.

> THE FUEL GAUGE TEST
>
> *The metric is how much fuel is left. Good is anything above a quarter tank. If it's off, you fill up. That is the move. Then you go back to driving. Nobody stares at a fuel gauge for its own sake. Every line on your Scorecard should work that way.*

The column that reads the page

A page built on that rule is already better than most. But it still leaves one job to the reader: connecting the lines to each other. One line can look fine alone and mean something different next to another. That connecting is what the assessment column does. Next to each line, the Scorecard carries three things:

- **A status.** On track, watch, or off.
- **A trend.** Which way it is moving, because a number that is off but improving is a different story than one quietly sliding.
- **A short read.** A few plain sentences that interpret the number, connect it to the others, flag what is coming, and point to the move.

Back to the fuel gauge. On its own it says quarter tank. The read sees the quarter tank, sees how far you still have to drive, and tells you to fill up at the next exit rather than the one after. The number reports. The read thinks. This is the Queen from Chapter 1, made real on the page.

On the page, a short read looks like this: “9% of project matters stalled, up from 6% last quarter. Three matters account for the rise, all in commercial leasing, where two lawyers are out. Reassigning them this month brings it back under our 7% target.” The Queen drafts that from the numbers. A person edits it and owns it before it reaches the board. On a page built by hand, a person simply writes it.

One hard limit, and everything depends on it. The read is only as good as the data underneath. When the data is thin, the read says so, gives you a direction instead of a false decimal, and flags how far to trust it. It never makes the call for you. Oversold, it is the fastest way to lose the room, because the first time the read is confidently wrong, nobody trusts the page again.

Hold every number you are tempted to report to that standard and most fall away, which is the point. What is left is a short page you can run the function by and put in front of the board. Next we put the rule to work on the five questions, and the eight numbers that answer them.

CHAPTER 4

The Questions the Board Is Really Asking

I spent years presenting to boards and executive teams, and years since listening to what directors and senior leaders say they want from legal. The pattern never changed. The board does not want more metrics. It wants answers to a handful of questions.

Everything on the page exists to answer one of those questions. Get the questions right and the Scorecard almost builds itself. Get them wrong and you are back to reporting activity and calling it performance.

For each question: the number or two that belong on the page, what good looks like, the move when it is off, the data it takes to build, and, where there is one, the input that is hardest to get.

One note first. What “good” looks like is not fixed. It shifts with your stage and strategy. A fast-growing company expects some lines to run hot; a steady one does not. I will flag where the target moves with you.

1 Are we on top of the whole workload?

Pillar: Demand and Workload. Two numbers. One is the work you can see. One is the work you can't.

Work in vs. work cleared

PLAIN ENGLISH: Is work coming in faster than we clear it?

GOOD LOOKS LIKE: Flat or shrinking. Work in and work out roughly matched. Scaling fast, expect intake to run ahead for a while; the read is whether the gap is widening or closing, not that a gap exists.

IF IT'S OFF: Triage harder, reprioritize, or open the capacity conversation, which returns in question 4.

DATA: Matter open and close events, scoped by the matter-category tag. Count matters in and matters out, using the same unit on both sides. The requests that never became a matter are measured by the front-door lines, response time and self-serve rate, so nothing is counted twice.

Matter category note: *Scope this to project and advisory work. Leave portfolio matters out. A trademark portfolio is open for years by design; count it as backlog and the number climbs forever and tells you nothing.*

Hardest input: *A clean, consistent definition of "cleared" across every practice area, because each one closes work in its own language.*

Shadow demand (trust and coverage)

PLAIN ENGLISH: How much legal work is happening without legal?

GOOD LOOKS LIKE: Low and falling. When legal is fast and easy to work with, people come to you. The business routes around you when you are slow, hard to reach, or seen as the place work goes to die.

IF IT'S OFF: Rising shadow demand is not a staffing problem first, it is a trust problem. Find out why people are going around legal and fix that. The count is the symptom.

DATA: No clean feed. You build it from proxies: contracts executed with no matching legal matter and no approved self-serve path, purchases over a threshold with no legal touch, agreements sitting in an inbox that never came through intake. You are counting what never reached you, so you report a direction, not a decimal.

Putting this number on the board page takes some courage, and that is the point. It is easier for a new GC, who inherits the department. For a leader who has held the seat, choosing to show that the business sometimes routes around legal is a bold and honest move: it names a problem that grew on your watch and puts it on the page anyway. **That is leadership, not exposure.** The strongest operators are the ones who see they have drifted out of touch and close the gap in the open. Shadow demand is the truest read on whether the business trusts the function, and running it well is how you drive the number down.

2 Is the business unblocked, and are matters moving?

Pillar: Responsiveness and Progress. Two numbers. One is the front door. One is everything already inside.

Time to first response

PLAIN ENGLISH: When someone asks legal for help, how long until they actually get helped?

GOOD LOOKS LIKE: Inside the response time you have promised the business, and consistent, not just fast on average. If you have not set that promise, setting one is step one.

IF IT'S OFF: A slow first response is a front-door problem. Add intake capacity, or route the simple requests to self-serve so your lawyers see the work that actually needs their judgment.

DATA: Intake first-touch timestamps.

Hardest input: *Defining "response" so an automated acknowledgment does not count as help. The clock stops when a person touches the work and moves it forward, not when the system says "we got it."*

Stalled-matter rate

PLAIN ENGLISH: How much of our open work has gone quiet?

GOOD LOOKS LIKE: Low and steady.

IF IT'S OFF: Work is sitting. Name the stalled matters, find out why, reassign or unstick them.

DATA: Matter status and last-activity date.

Matter category note: *This is why "average cycle time" is not on this page. Average a three-day question with an eighteen-month lawsuit and a twenty-year patent, and the number is noise. Stalled-matter rate never averages across categories; it asks what has stopped moving that should be moving.*

Hardest input: *The normalized status layer (Chapter 5) that lets "no movement" mean the same thing in litigation, IP, or contracts.*

The rate is the board number. Which specific matters stalled, and why, is the operating view underneath, and that is the next book, not this page.

3 Are we protected?

Pillar: Risk and Control. One number, on purpose. Risk tempts you to build a wall of indicators. The board needs the one that matters most: are the deadlines that could hurt the business owned and on track?

This is the line that carries the most fear. A missed date can cost real money or a legal position you cannot get back. Treated as a control, the fear turns useful. The number stops being a threat and becomes proof you are covered.

Exposure, what could hurt us and how much, is not on this page on purpose. It reaches the board through finance and the audit committee as a reserves and disclosure question, not an operating one. The operating question is whether the dates that create exposure are owned and on track.

Critical-date coverage

PLAIN ENGLISH: Are the deadlines that can really hurt us owned and on track?

GOOD LOOKS LIKE: Every critical date has an owner and a status. Zero missed. The at-risk count low and shrinking.

IF IT'S OFF: An at-risk critical date is not next quarter's problem. Escalate it and staff it now.

DATA: Docketing systems, court dockets, regulatory calendars, and contract renewal and termination dates.

Hardest input: *The fragmentation problem in one line. Your critical dates do not live in one place. Pulling them into one view is the hard part, and for most teams it is the honest answer to "why can't we see this yet?"*

You do not need to risk-rank every matter for the board. You need the critical dates identified, owned, and tracked. A blown filing, a missed response date, a lapsed maintenance fee: each is material on its own. You need to know these are covered.

4 Are we growing capacity faster than headcount?

Pillar: Efficiency, People and Tech. Two numbers. One shows whether the tech is carrying load. One shows whether the people are underwater.

Self-serve rate

PLAIN ENGLISH: How much demand gets handled without a lawyer opening a matter or touching the request?

GOOD LOOKS LIKE: Rising over time. More of the routine handled by the system, more lawyer time on the work that needs a lawyer.

IF IT'S OFF: Flat or falling self-serve means the tech is not carrying its share. Find the repetitive, low-risk work that should be self-serve and move it there.

DATA: Intake resolution paths, how each request was closed.

Gaming watch: *"Self-served" has to mean "resolved," not "quietly dropped," and not "handed to a lawyer." Watch the re-submission rate. If self-served requests keep coming back, they were not handled.*

Risk guard: Self-serve is bounded to the categories a lawyer has pre-approved with a playbook. Anything outside them routes to a person, every time. The board should hear that boundary in the same breath as the number.

Load per lawyer

PLAIN ENGLISH: How much is each lawyer carrying?

GOOD LOOKS LIKE: Stable and manageable. A scaling team runs hotter by choice; the question is whether it is sustainable.

IF IT'S OFF: A sharp rise is the early signal of the headcount-versus-tech decision. It is also how you build the case for the right headcount: before you add, show what self-serve is absorbing and what it is not.

DATA: Active matter counts and headcount, with the roster marking which matters an outside provider carries.

Honesty flag: *Legal rarely tracks its own time, so treat this as a proxy and label it on the page. Use it as a trend and a flag, not a precise workload measure.*

5 Is spend under control?

Pillar: Spend and Financial Management. One number. It is the CFO's number, and the one line on this page the CFO will personally check.

Outside counsel spend vs budget, with a forecast to year-end

PLAIN ENGLISH: Are we on plan, and where will we land?

GOOD LOOKS LIKE: On or under plan, forecast holding.

IF IT'S OFF: Over plan is a real choice: reallocate, renegotiate rates, settle what should be settled, or pull work in-house. The Scorecard flags it early enough to make that choice on time instead of at year-end.

DATA: eBilling, invoices, the department budget, and accruals.

Hardest input: *Accruals, work your firms have done but not yet billed. Leave them out and spend looks lower than it is and the forecast is wrong, which is exactly the number the CFO will hold you to. The fix is to get accruals from the source: have your firms submit their own estimates each month, through a portal or as a condition of the engagement, instead of guessing them internally.*

Watch flags: *Open matters with outside counsel assigned but no invoices yet, and open matters with activity but nothing billed in months. Both are spend that is coming and not showing up in the number.*

That is the page

Five questions, eight numbers:

- **Work in vs. work cleared, and shadow demand,** for whether you are on top of the work.
- **Time to first response and stalled-matter rate,** for whether the business is unblocked and work is moving.
- **Critical-date coverage,** for whether you are protected.
- **Self-serve rate and load per lawyer,** for whether capacity is growing faster than headcount.
- **Outside counsel spend vs budget,** for whether spend is under control.

Every line is plain enough for the board and the executive team to read without a translator, and every line is tied to a move. A number that does not change what you do next did not make this page.

None of this is one-click. Notice how many of these lines came with the same warning: the data underneath is the hard part. That is where the next chapter goes, building these on the data you actually have, gaps and all.

CHAPTER 5

Data Is King

I have spent about thirty years in legal tech, most of it inside the data this chapter is about, from years in eBilling and matter management to building the systems legal teams run on. I am not a lawyer. What I know is where this data lives, and where it quietly goes wrong.

Bad data does not announce itself. It shows up clean and precise on a slide, someone makes a real decision on it, and only later does the gap surface. A budget reported on plan because the unbilled work was invisible, then blown a quarter later when the invoices land. A workload that looked manageable because a third of it never entered a system. The number was not wrong so much as incomplete, and nobody said so. Closing that gap, between what the data shows and what is true, is what this chapter is about.

Data is King. That was true in every one of those thirty years, and it is still true now that there is a Queen on the board. The Scorecard is only as good as the data it can see and trust. AI can read the numbers and connect them, but it reads what the data holds and nothing more. Get this layer right and the rest of the book works. Skip it and you have built a confident-looking page on sand.

Two things make it work. Sort your matters by the kind of work they are, because a patent and a lawsuit are not measured the same way. Then get every system to describe where a matter stands in the same words, so "stuck" means the same thing everywhere. Sort the work, then make it speak one language.

Sort by matter category, not status

I call this category on purpose. Most systems already have a matter type, usually a sub-type under practice area, and someone worked hard on those. This is a different field, one level up, and it leaves your matter types alone. By category I do not mean the practice area, and I do not mean the type your system files a matter under. I mean the kind of life the work leads. Three categories cover most of a legal department.

- **Project matters.** They begin and end. A contract negotiation, a piece of litigation, a deal. They run on a clock, even if a lawsuit and a deal keep very different clocks, so "how long" and "stuck" mean something.
- **Portfolio matters.** Open for years, by design. A patent, a trademark, a standing compliance program. Cycle time is meaningless; deadline coverage is the point, not speed.
- **Advisory and quick-turn work.** A question answered in a day, a fast review, the standing advice matter a business unit keeps open all year. Much of it never becomes a formal matter, and most of it is invisible to your systems.

Here is why the sort comes first. Two matters, both marked open, both quiet this month. One is a trademark resting between filing deadlines, exactly where it should be. The other is a project matter that has genuinely stalled, work the business is waiting on. On a status field they look identical. They mean opposite things. Sort by category first and the trap goes away.

> **A NOTE ON ADVICE**
>
> *Some departments will want a fourth category: Advice. The guidance that never becomes a matter at all, or that lives in a standing matter kept open all year to collect it. If that is a big share of your work, or your Legal Ops team is already asking for it, split it out. The three categories above still hold. Advice gets its own bucket, and it stays out of the moving-and-progress lines the same way portfolio does.*

Speak one language: normalize the statuses

Sorting by category tells you which matters to measure how. Normalizing status lets you measure them together at all. This is the real deliverable of the chapter.

Every practice area speaks its own lifecycle dialect. IP moves through filed, office action, allowance, issued. Litigation runs off the court's docket. Contracts go drafting, in review, executed, expired. Each is right in its own world, and none line up. Ask how much of our work is stuck across all of them and you are comparing words that do not match.

The fix is a small set of universal board states that every matter maps into, whatever tool it lives in:

- **Intake.** It has arrived, but work has not started.
- **Active.** Someone is working it now.
- **Waiting.** Open but blocked, on a court, a counterparty, a signature, someone else's desk.
- **Closed.** Done.
- **Dormant.** Open by design and resting between deadlines: a registered mark in maintenance, a standing agreement, a standing advice matter between questions, an entity in good standing. Never mistaken for stuck, and never counted as cleared.

Underneath, nothing changes in the source systems. You add one translated layer on top that maps each native status into these few. Build it once and half the board page starts to work.

The gaps you count on purpose

Even with category and status sorted, parts of the picture are missing, and if you do not count them on purpose you quietly report as if they are zero. Three gaps trip up almost every team.

- **Shadow demand.** Work that never entered a system. You triangulate: contracts executed with no matching matter, purchases over a threshold that never came through legal, signed agreements sitting in a business team's inbox, and a simple pulse, asking a few business leaders what they handled without legal last quarter. None is exact. Together they give you a direction you can trust.

- **Effort and capacity.** Legal rarely tracks its time, so you do not have real hours. The honest stand-in is active matters per lawyer, using the Active state above, counted internally, separating matters your team runs itself from ones an outside provider is working. Treat it as a management number, not a measure of hours.
- **Request-to-matter loss.** Requests come in the front door; some become tracked matters and some do not. Decide, in plain terms, what becomes a matter, and apply it the same way every time. A workable default: a tracked deliverable, an owner, and more than a quick answer makes it a matter; a quick question resolved the same day is a request, logged but not opened.

Living with the gaps

You will never have all of it. That is the condition you build in, not a reason to wait. Three principles keep an incomplete Scorecard honest.

- **Integrity over completeness.** Report what you can trust, and show how much of the picture it covers.
- **The read never outruns the data.** When the data underneath is thin, the read gives a direction, not a false decimal, and says how far to trust it.
- **Progressive, not perfect.** A Scorecard you can stand up and trust in a few weeks beats the perfect one you never ship.

> ***Fake precision is worse than an honest gap.***

Because the first time someone catches it, they stop trusting the whole page. An honest caveat keeps its credibility. A confident number that turns out to be hollow loses it for everything.

Put your resources where the work is

This is the part I feel strongest about, from years inside these systems. The technology to do all of this already exists. The hard part was never the software. It is the integrations, getting the systems where your data lives to talk to each other, and the people and design work that turn a pile of feeds into a page you can trust.

- **The integrations are the key.** Your data is spread across intake, matter management, IP docketing, contract systems, litigation dockets, and eBilling. The value is in connecting what you already have. Integration-friendly, never rip-and-replace.
- **The data and design work is what makes it real.** Someone has to own how the data is captured, mapped, and kept clean, and design the states and proxies this chapter described. It belongs to people who know both the data and how legal

runs: your Legal Ops team, engaged people in Legal, or a specialist who has done it before.

Expect your software to do more for less, and put what that frees up into the expertise that turns feeds into a page you can trust. And a line I hold to on the AI: it helps only as much as the data allows. It can speed the capture, suggest the mappings, flag the gaps. It cannot invent trustworthy data you never collected.

One more thing to build toward

There is a control that does not belong on the board page yet, but is worth naming: traceability to approved sources. The difference between an answer grounded in an approved, current source and one that is stale or quietly guessed.

That is a governance question sitting on top of a data one: keep a trusted library of approved sources and have the system answer from that library. It is not lawyer work; it belongs to Legal Ops, IT, and your knowledge people, with a lawyer only blessing what counts as approved. Most teams reach this a step later, once the board page is standing and trusted. Set it aside for now, and know it is manageable.

Where this leaves you

Sort the work by category. Get your systems describing that work in the same words. Be straight about what you cannot yet see, and put your effort where the real work is. Do that, and every number in the last chapter has something solid underneath. The page does not need to be perfect to start. It needs to be honest, and it needs to be moving. The next chapter takes these pieces and builds the one page.

CHAPTER 6

Design Your One Page

A board digests a page in the order it is laid out, not the order you built it. Group the eight lines under the five questions, put status and trend where the eye lands first, set each read beside the number it explains, and a director takes in the whole function in one pass and lands on the line that needs them. That is not cosmetic. A page that reads clean gets acted on. A cluttered one gets debated, or set aside.

Design also comes before building. A page built before it is drawn becomes a spreadsheet someone rebuilds by hand every month until the work gets too heavy and it quietly dies. So this chapter is the design: what goes on the page, where each number comes from, and what it takes to feed it. The actual build is its own job, and a companion Build Blueprint walks through it, including what to do if you have no system that can assemble it yet. You cannot build what you have not drawn.

The design is not the layout

Laying the page out takes ten minutes. Eight lines under five questions, status and trend on the right, the read beside each. The design is underneath it: deciding, for every line, where its number lives and what it takes to feed it without someone re-keying it each month. Do that, and you have a page that can fill itself over time. Skip it, and you have a spreadsheet. Here is the design, line by line.

Line	On the page (illustrative)	Where the number comes from	When it lands
Work in vs. work cleared	104 in, 96 cleared. Watch, slightly worse	Matter management. Needs the normalized closed state and the matter-category tag.	After the data layer
Shadow demand	Rising. Watch, worsening. Directional, low confidence	No system of record. A periodic reconciliation: contracts and purchases with no matching legal matter.	Proxy. Estimate now
Time to first response	1.2 days (target 1.0). Watch, flat	Intake timestamps. A clean definition of the first human touch.	Now
Stalled-matter rate	9% of project matters. On track, improving	Matter management, status and last activity. The normalized states.	After the data layer
Critical-date coverage	100% owned, 2 at risk. Watch, flat	IP docketing, court dockets, contract renewals, regulatory calendars.	After the data layer
Self-serve	38% of requests. On	Intake resolution paths, plus the re-	Now

Line	On the page (illustrative)	Where the number comes from	When it lands
rate	track, rising	submission rate.	
Load per lawyer	~22 active matters each. Watch, rising. Proxy	Matter counts and your roster, split by work you run vs. an outside provider.	Proxy now. Refined after the data layer
Outside counsel spend vs budget	68% used, forecast 4% over. Off, worsening	eBilling, budgets, accruals, so the forecast is not short by unbilled work.	Once eBilling connects

Illustrative values, not benchmarks. The design is in the last two columns: where each number comes from, and when it can land.

Design for the data you have

Your page will not light up all at once, and the map tells you the order. Start at the front door. Feed the lines from one clean source first: response time and self-serve rate from intake, and spend once eBilling is connected. The three that wait on the data layer, work in vs. work cleared, stalled-matter, and critical-date coverage, come online together once that work is done. Load per lawyer runs as a labeled proxy from your matter counts until the roster split is in. Shadow demand has no feed and stays a proxy. Design the page whole, and let it fill in as each source comes online. A page that fills itself, even a partial one, beats a complete page you rebuild by hand until the month you stop.

No system that can assemble it yet? Build it by hand, on purpose.

You do not need a platform to start. A page built in a spreadsheet can be trustworthy if you treat it like a system instead of a one-off.

- **One workbook is your model.** A tab for each source, and one tab that rolls up to the page.
- **A written pull routine.** Same reports from each system, same day each month, same steps, so anyone can run it and it comes out the same.
- **One owner, one cadence, marked gaps.** The page is only as current as its slowest pull. Pick a rhythm, hold it, and flag any line you cannot yet trust.
- **Design so it migrates.** When a real feed becomes available, it replaces a tab, not the page.

A line you cannot fully feed yet still belongs on the page, as long as you mark it. A coverage note or a confidence flag tells the board exactly how far to trust it. A gap you show says you know where your data ends, which is the opposite of a weakness.

That is your Scorecard, designed. One page, every line mapped to its source, honest where the data is thin. The next step is to build it. The companion Build Blueprint walks the wiring each line needs, the order to do it in, and the path for a team with no system that can assemble the page yet, so you can start by hand and migrate later without redrawing a thing.

Want the wiring, line by line? The Build Blueprint is free at legaloperator.ai/resources: the step-by-step for turning this design into a page that fills itself, whatever systems you have.

CHAPTER 7

What's Next

You have a designed page now. Eight lines under five questions, each mapped to where its number lives, honest where the data is still thin. That page is the top of a stack: what the board sees, sitting on everything your team runs day to day. Two things sit ahead, and neither is a reason to wait to start.

Build it

The design is done. Building it is its own job, and the companion Build Blueprint walks it line by line, with three tracks depending on how connected your systems are today. Start where you can see clearly. The front door, the requests coming in, is the one stream most teams can stand up first, and spend is usually the cleanest data you already hold. Get a page you trust in front of your board, and let the rest fill in behind it.

The operating views beneath it

The board page is one page on purpose. Beneath it are the operating views your team runs the work by, the detailed reports under each board line: cycle time by matter category, the named stalled matters, spend by firm and practice area, and the significant matters report most boards already get and most teams dread compiling. That is where the next book in this series goes. Its anchor is an idea this book only set up: traceability to approved sources. The board page tells you where you stand. The operating views tell you how far to trust every number under it.

What to carry with you

The technology to do all of this already exists. The hard part was never the software. It is the integrations and the people, connecting the systems your data already lives in and doing the design work that turns feeds into a page you trust. Build on what you have rather than tearing it out, and never let the page, or the AI reading it, promise more than the data can back up.

That is the whole idea. Data is King, AI is Queen, and execution wins the game. The page is built to be run, not filed, and the moves it points to are what change the function.

You do not need the perfect version to begin. You need one honest page you can stand behind, and you can start drawing it today. Begin at the front door, where you can see clearly and where the pressure is. The rest of the stack will be here when you are ready for it.

TWO WAYS TO START TODAY

Download the Build Blueprint at legaloperator.ai/resources and build your first page.

Or email hello@legaloperator.ai with the one line on your current board slide you trust the least, and I'll tell you what it's hiding.