



Scaling Legal

A Practical Guide for Lean Legal Teams

Smart strategies and repeatable processes to
help small legal teams deliver large-scale impact



Time and capacity are often in short supply for lean legal teams.

Yet with the right systems, processes, and partnerships, even small legal departments can operate with the efficiency and impact of much larger organizations.

This guide highlights practical strategies for managing the details that often drain valuable bandwidth and slow progress. By automating renewals, tracking compliance deadlines and leveraging outside counsel strategically for overflow or specialty matters, lean legal departments can stay focused on high-value work while maintaining long-term strategic readiness.

You don't need to tackle everything at once. Choose the focus areas most relevant to your business right now and build from there.

10 Ways to Expand Legal Bandwidth

1

Corporate Governance & Board Alignment

Objective: Keep your governance framework current, consistent, and defensible.

Focus Areas:

- Document approvals for major contracts, M&A, and compensation.
- Verify that minutes and resolutions reflect actual actions taken.
- Review your cap table for consistency with equity compensation and investments.
- Ensure state filings, annual reports, and officer/director updates are current.
- Prepare officer certifications required by lenders or auditors.

Pro Tip: Maintain a single “Governance Binder” (digital or physical) to help streamline audits and board reporting.

2

Contracts & Vendor Management

Objective: Minimize renewal surprises and manage risk proactively.

Focus Areas:

- Track renewal dates, notice periods, and key obligations— even a simple spreadsheet works if you don’t have a contracts management tool.
- Audit high-value customer and vendor agreements.
- Centralize contract templates and retire outdated versions.

Pro Tip: Tag your contract repository with renewal alerts using tools like Google Drive or Ironclad— the ROI can be immediate.

3

Compliance & Regulatory Readiness

Objective: Align your compliance posture with operations and regulation.

Focus Areas:

- Maintain a list of business licenses and registrations and renewal dates.
- Map out annual compliance deadlines.
- Audit marketing claims and website disclosures.
- Conduct short virtual policy refreshers for key stakeholders (Code of Conduct, Anti-Bribery, Cybersecurity, Harassment).
- Flag emerging legal issues for leadership.

Pro Tip: Regulators value documentation of compliance — keep compliance files up to date.

4

Litigation & Dispute Oversight

Objective: Reduce surprises in budgets, disclosures, or open matters.

Focus Areas:

- Reconcile open matters (claims, subpoenas, and investigations) and confirm related budget reserves with Finance.
- Update litigation holds and ensure new employees understand their obligations.
- Close dormant disputes where possible and archive settlements for confidential access.

Pro Tip: Summarize all active matters in one executive-level slide—concise visuals carry more impact than dense memos.

5

Employment, HR & Equity Alignment

Objective: Ensure policies and records are accurate and current.

Focus Areas:

- Update employee handbooks annually.
- Review compliance with relevant pay transparency, equity and privacy law.
- Confirm equity grants and option exercises are documented, board approved and reflected on the cap table.
- Review bonus plan documentation and eligibility terms.
- Audit employee classification (W2 or 1099) for remote or multi-state workers.

Pro Tip: Treat policy updates as opportunities to strengthen culture, not just check compliance boxes.

6

Insurance & Risk Management

Objective: Confirm coverage aligns with current operations and exposures.

Focus Areas:

- Review D&O, EPLI, cyber, and general liability policies.
- Confirm vendor certificates of insurance are current.
- Compare coverage limits to business growth.
- Calendar renewal dates at least 60 days ahead.

Pro Tip: Use renewal season to realign risk protection with business strategy.

7

Privacy & Cybersecurity

Objective: Align privacy and cybersecurity programs with current legal and operational standards.

Focus Areas:

- Review new state data privacy laws.
- Audit vendor DPAs, HRIS systems, and employee data flows.
- Confirm HRIS and benefits vendors are contractually required to meet company security standards.
- Test data breach response readiness by running tabletop exercises.

Pro Tip: Integrate privacy and security into daily operations to promote a culture of compliance.

8

Intellectual Property

Objective: Protect core IP assets and align with your business roadmap.

Focus Areas:

- Audit trademarks and renew registrations.
- Confirm new product/service names are protected.
- Confirm IP assignments are executed to protect company ownership.
- Review NDAs and access controls for trade secret protection.
- Identify new assets to protect and obsolete ones to retire.

Pro Tip: Regular IP reviews turn compliance into strategic value creation.

9

Metrics & Budgeting

Objective: Demonstrate legal's value and plan for the year ahead.

Focus Areas:

- Categorize legal spend by its business value (e.g., revenue enablement, risk reduction) to show ROI.
- Prepare a summary by matter type or business unit and highlight cost savings achieved (renegotiations, disputes avoided, insourced work).
- Review outside counsel engagements, comparing rates and performance.
- Evaluate legal tech investments (DocuSign, Monday.com, or similar) for bandwidth efficiency.

Pro Tip: Translate legal output into business outcomes — that's the language leadership remembers.

10

Cross-Functional Planning & Communication

Objective: Align legal priorities with business goals and demonstrate leadership.

Focus Areas:

- Meet with key departments (Finance, HR, IT, Sales) to identify shared legal dependencies and pain points.
- Update OKRs/KPIs (contract turnaround time, policy refreshes, disputes closed).
- Prepare a concise "State of Legal" snapshot (memo or slide deck) for leadership updates.
- Update the Board on litigation, compliance risks, and the regulatory horizon.
- Create an internal FAQ or intranet summary key upcoming legal changes.

Pro Tip: Tell a story of progress — how legal made the business stronger through risks reduced and deals delivered.



Structure Creates Scale

Lean legal teams succeed through focus and structure — not headcount. By automating routine tasks and partnering strategically, you can free up bandwidth for high-value work and deliver the same efficiency and impact as a large-scale department.

About OGC

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With a deep bench of talent, OGC serves companies of all sizes either as a fractional general counsel or as a seamless extension to an existing legal department. OGC's approach is simple: We offer practical legal advice with less over-lawyering.



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