Contents

E	oreword	
B	reface	vii
		viii
-	knowledgements	ix
1	Introduction	IX
	1.1 Aims of the book	1
	1.2 Common themes	-1
	1.3 How can I apply it?	2
2	Strategy: sourcing and allocating external legal services	2
	Annex 2A: 'Make or buy' model checklist	3
	Annex 2B: Legal strategy framework	5
3		8
	External sourcing: briefing, tendering and evaluation of panels Annex 3A: Procurement brief	15
	. Tocarchicht bilei	17
	. This tation to telluer framework	20
	Annex 3C: Bid preparation responsibility matrix Annex 3D: Bid evaluation scoresheet	23
	Annex 3E: Model consultancy checklist	25
4		27
	Leveraging value from external providers Annex 4A: Fee models	29
	Annex 4B: Added value framework	30
	Annex 4C: Examining the value concept	32
-	the value concept	35
,	Managing the relationship	37
	Annex 5A: Protocol framework Annex 5B: Service level agreement in All	38
	Annex 5B: Service level agreement – internal legal team Annex 5C: Panel survey framework	46
	Annex 5D: Key performance indicators	49
	Annex 5E: Agenda for individual relationship management review	51
	Annex 5G: All firm panel conference template	56
	Annex 5G: All-firm partner meeting agenda template	58
	Reviewing the panel	59
	Annex 6A: Panel review questions	61
	raniex ob: Panel review interview from 1 (62
	Annex 6C: Re-tender request letter – existing firms	65
	Ending the relation of the	66
	Annex 7A: Termination checklist	69
	Tellimation checklist	70

vi CONTENTS

8	Alternative legal service providers Annex 8A: Provider review checklist Annex 8B: Managed legal services checklist Annex 8C: Letter of engagement Annex 8D: Instructions pro-forma	72 73 75 77 81
9	Anney 91: Feedback	82 83 84 86 89 91 94 98 101 103
10	Demonstrating value from the in-house team Annex 10A: Benchmarking Annex 10B: Post-transaction review form Annex 10C: Reporting framework Annex 10D: Dashboard report Annex 10E: Annual fees spreadsheet Annex 10F: Trends spreadsheet Annex 10G: Annual report framework	107 108 109 111 113 114 116 118
11	Law Society procurement protocol 11.1 Signing up to the protocol 11.2 Protocol statement of commitment and supporting tools Annex 11A: Procurement protocol Annex 11B: Procurement checklist Annex 11C: Guidance and information on implementing the protocol for purchasers of legal services Annex 11D: Model tender questionnaire Annex 11E: The Law Society supplier scorecard – equality and diversity	120 120 121 122 123 126 128 136
12	Where to find out more 12.1 Further reading 12.2 Useful websites 12.3 Law Society resources 12.4 Contact organisations	141 141 141 142 142

As reversed to a leaned over ewa questions

To see a leaned of sew distoryies framework for the organisation.

Forewo

The in-house secreter, the in-house services to your regulation and to effectively than e

We are here to be guidance and km in-house function what services yo your team and d

Our members tel we hope this is t

In our drive to it targeted communorg.uk/communiguidance and ne queries or sugge

We have a dediporting general

May I also encoor This service offer Our current sup compliance: see

This toolkit is air ole within an or tools to manage

Andrew Caplen President of the August 2014