

Audit your approach:

An overview for assessing your current metrics program to identify strengths, gaps, and opportunities for improvement

What it is

The Audit Your Approach process is a structured evaluation of your legal department's current approach to metrics against the [Best Practice Metrics Framework](#). This comprehensive review examines five key areas: what you measure, how you collect data, how metrics are used, how results are reported, and how you review them. This is a forward-looking assessment designed to help you build a metrics program that tells the complete story of your legal department's strategic value.

Why it matters

Most legal departments collect some data, but few have a comprehensive, strategic approach to measurement. Without a clear understanding of your current state, it's difficult to know which improvements will have the greatest impact on demonstrating your department's value. An audit provides that clarity.

This audit helps you ask:

- Will this format enable us to track progress over time?
- Can we benchmark this against industry standards or peers?
- Does this format make it clear when we're succeeding or falling short?
- Is this realistic to collect and calculate with our current systems?
- Will stakeholders understand what this measurement means?
- Does this format align with how the business measures success?

The audit serves as both a diagnostic tool and a planning foundation. It gives you a clear, honest assessment of where you are today and a practical path forward to where you want to be.

When to conduct an audit

Consider conducting an audit when:

- **You're starting from scratch.** You have minimal or no formal metrics program and want to build one from the ground up with best practices in mind.
- **Leadership is asking for better reporting.** Stakeholders want to see evidence of legal department value, but your current metrics don't tell the complete story.
- **Your metrics focus mainly on cost.** If your measurement approach emphasizes efficiency and spend but doesn't capture effectiveness, protection, or enablement, an audit can help balance your portfolio.
- **There's been significant change.** New leadership, organizational restructuring, or strategic shifts create an opportunity to reset your measurement approach.
- **You're preparing for AI implementation.** Understanding your baseline measurement capability is essential before introducing AI tools, so you can demonstrate their impact.

What the process involves

The audit process follows a structured, collaborative approach:



Depending on your needs and the complexity of your current program, the entire process can be completed as a quick assessment in a few hours or as a comprehensive audit over several weeks. The approach is adaptable to meet you where you are.

Time investment

You can choose the depth of audit that fits your situation:

Quick assessment	4-6 hours	Focus on high-level review of existing metrics and major gaps. Best for legal departments with minimal current measurement who want to establish priorities quickly.
Standard audit	2-3 weeks	Comprehensive review including stakeholder interviews, detailed documentation review, and thorough gap analysis. Best for established departments looking to enhance existing programs.
Deep-dive audit	4-6 weeks	Extensive assessment including data quality evaluation, system reviews, and detailed recommendations for each area. Best for complex, multi-jurisdictional departments or those preparing for major transformation initiatives.

The level of investment should match your current situation and improvement goals. A quick assessment can deliver significant value and establish momentum, while a comprehensive audit provides the detailed foundation needed for major program development.

Who should be involved

An effective audit requires input from multiple stakeholders:

- **General Counsel or legal department leader:** Provides strategic context, articulates departmental goals, and makes final prioritization decisions.
- **Legal Operations (if applicable):** Offers detailed knowledge of current systems, data sources, and reporting processes. Essential for understanding technical capabilities and constraints.
- **Practice group leads:** Provide insight into what metrics matter for specific practice areas and what data is currently tracked informally.
- **Team members:** Share practical perspective on data collection burden and what information would actually be useful for their work.
- **Key business stakeholders (optional but valuable):** Help validate which metrics would be most meaningful for demonstrating value to the broader organization.

Including diverse perspectives ensures the audit captures the full picture and that recommendations will have buy-in across the team.

What you'll get

At the completion of your audit, you'll have:

- **Current state summary:** A clear, documented picture of your existing metrics program including what you measure, how you collect data, and how you report.
- **Gap analysis results:** A side-by-side comparison of your current approach against best practice across all five framework dimensions, highlighting specific areas of strength and opportunity.
- **Actionable recommendations:** Specific, practical suggestions for improving your metrics program, organized by theme and level of effort required.
- **Prioritized roadmap:** A collaborative plan identifying which improvements to tackle first, second, and third based on strategic alignment and practical feasibility.
- **Implementation foundation:** The groundwork needed to begin building or enhancing your metrics program with confidence and stakeholder support.

The goal of an audit isn't to find everything that's wrong; it's to establish a clear, honest starting point for making strategic improvement decisions. Most legal departments have real strengths to build on, even if their measurement approach isn't comprehensive. The audit helps you identify those strengths, understand the gaps, and define a practical path forward aligned with your priorities and resources.

Remember: You don't need to fix everything at once. The audit allows you to be strategic, focusing on the improvements that will have the greatest impact on demonstrating your department's value to the organization.

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Value Alignment Toolkit

Access toolkit

