The legal QBR guide.

Build your own

INSIDE THIS GUIDE

The guide, in five parts.

01 What to measure — Three numbers, then the framework.

02 How work was handled — Zero, one or substantial touch.

03 Measure it in Wordsmith — Set it up once, and let it run.

04 Where the numbers come from — Every template slide, mapped to its source.

05 Before it goes to your CEO — Five checks.

Report what changed.

Not how busy Legal was.

Contract counts and turnaround are the easiest numbers to collect. On their own, they reward the wrong behaviour.

Try three numbers for one quarter.

01

Cycle time. Days from the first request to the signed agreement.

02

Revenue waiting on Legal. The value of deals in the queue today.

03

Deviation from standard terms. Speed means little if you accepted every change.

Then build out the framework.

READ WITH CARE

Fast can just mean every change was accepted.

01

End-to-end cycle time

Separate Legal's time from time waiting on others.

02

Revenue waiting on Legal

Not revenue lost, and not revenue Legal created.

03

Deviation from standard terms

Not every deviation matters equally. Report by clause.

04

How work was handled

Define zero, one and substantial touch once.

05

Escalations and risk calls

Escalation isn't failure. Deal value is a poor risk filter.

06

Rework and repeat questions

A fast first answer isn't a resolved request.

07

Agent performance and cost

Include supervision, maintenance and correction time.

08

External counsel spend

Lower isn't always better. One deal can distort a quarter.

Define the levels before you show a percentage.

Avoid “self-serve”. It sounds as if Legal let go.

01 · ZERO TOUCH

None.

Runs inside Legal’s guardrails. No lawyer intervenes.

02 · ONE TOUCH

Once.

A lawyer reviews or approves once, then the work carries on

03 · SUBSTANTIAL

Led.

Negotiation, advice or drafting that needs a lawyer throughout

04 · EVERY LEVEL

Owned.

Legal designs the guardrails and owns the outcome

SHOW IT AS

Share of requests at each level

NOT AS

Work Legal no longer touches

Measure as you work. Your next QBR builds itself.

Usage and Value classifies every session by type of legal work and values it at your rates.

ASK WORDSMITH

Compare this quarter with last: hours and cost saved, by team and type of work.

01

Set up once.

In Settings, open Company Usage and Value. Set your currency, in-house and external rates, and job titles. Connect Slack, Teams and email to Intake.

02

Let it run.

Each session is classified by type of legal work. Hours and cost saved are recorded by person, team and agent. A monthly digest keeps you on track.

03

Export and ask.

Set the quarter as the date range and export the workbook. Ask Wordsmith for cycle time and work waiting on Legal from Tasks.

04

Save it as a Skill.

Next quarter, run the same Skill for the new dates. Same definitions, every time.

Where each slide’s number comes from.

TEMPLATE SLIDE	IN WORDSMITH
Quarter in four numbers	Tasks, a deviation Report, and the Overview figures
Demand and capacity	Teams and Insights tabs; touch levels from Tasks
Speed and service	Tasks, through Ask Wordsmith
Business moments	Legal Intelligence for that agent, and export tab 1c
Spend and value	The Money tab. An estimate: label it, and ask Finance to check it
Quality and learning	A Report on signed contracts, and Legal Intelligence

Give every number a source, an owner and a denominator.

01 Same period, same definitions, every time.

02 Label results, estimates and targets.

03 Keep capacity separate from cash saved.

04 Pair the numbers with two or three real requests.

05 End with the decision you need.

Your next QBR builds itself.

The template and our own QBR deck are at wordsmith.ai/qbr.