

Call for Proposal Toolkit

This document highlights best practices and tips on how to submit a strong and well-informed session proposal for the CLOC Global Institute.



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Please review all information in this toolkit before submitting a proposal.

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Submission Paths

We are excited to offer two distinct opportunities for members of the legal ecosystem to submit a proposal for the event. You may choose to submit a new session proposal or express interest in leading one of our curated topics. Below is information on both submission options so you can decide which path best fits your expertise and goals.

Prepare and Plan

Before getting started, review event information, and pull together your proposal details.

Choose Your Path

Call for Proposals

Submit original session ideas that reflect your unique insights, innovations, and experiences. Whether proposing a solo talk, panel, or workshop, you shape the content from the ground up. You design the format, define the learning objectives, and build an engagement style that resonates with the audience.

Proposal for Curated Topic

This option invites contributors to lead sessions based on pre-selected topics developed by the CLOC Education Advisory Council. Presenters collaborate to refine the structure and delivery, bringing their expertise and facilitation skills to ensure the content is engaging, inclusive, and aligned with audience needs.

Prepare and Plan

- **Determine your proposal path** – Review the 2 submission options (Open Call for Proposals vs. Curated Topic Proposal) and determine which you would like to submit. You can choose both.
- **Consider the event theme, focus areas and targeted topics** - Align your content. Review the [CLOC Global Institute website](#).
- **Know the audience** – Review the attendee segmentation information and how your content would appeal to these segmentations.
- **Focus on relevance** - Address current trends, challenges, or innovations relevant to the legal ecosystem. Demonstrate why this topic matters now and how it will be valuable for attendees.
- **Consider unique and innovative angles** - Propose something fresh and innovative. Unique formats or angles on familiar topics can help your proposal stand out.

Prepare and Plan

- **Select and confirm speakers** – You must have all speakers confirmed when submitting your proposal information.
- **Obtain necessary approvals from your organization** – If applicable, please ensure you have permission from your company to speak and present. Particularly if you plan to share any information, data, and/or resources from the company.
- **Follow instructions and guidelines** - Adhere to all guidelines, word limits, and formatting requirements. Pay close attention to submission deadlines and required documentation.
- **Quality over quantity** – Focus on building a strong proposal instead of submitting several different proposals. CLOC receives over 300 proposals each year. We ask that lead speakers and organizations limit their total number of proposals to 3.

Timeline

An outline of the session review, selection, and development timeline for the event. If your proposal is selected, you will be expected to adhere to this timeline and policies outlined in the [CLOC Speaking Agreement](#).

Make note of these important dates.

November 3, 2025: Submission deadline

January 9, 2026: Proposal decision notification sent to all applicants.

March 2026: Meet with the CLOC Team to discuss session development and content.

March 31, 2026: First draft of session content due.

April 17, 2026: CLOC Team provides feedback on session content.

May 1, 2026: Final version of content due.

Call for Proposals

Application Questions

Must Know

Please ensure you are prepared with these key items that you'll be asked for during the proposal submission process.

- ☐ Information on all confirmed co-presenters. All of your presenters must be confirmed at the time of application.
- ☐ A video of the lead presenter giving a presentation and/or presentation materials from a past-presentation.
- ☐ Permission from your organization to present at the event.

Application Session Information

Session Title (limit of 100 characters)

Ensure the title clearly communicates the session's topic. Avoid vague or overly broad language so attendees know exactly what to expect.

Aim for a short, punchy title. Generally, 5-10 words work best for capturing attention without overwhelming readers.

Session Description (2,000 Character limit)

Keep your description clear and concise but provide enough detail to demonstrate the depth of the content.

List up to 3 learning objectives or takeaways.

Define clear learning objectives. Outline what attendees will learn or take away from the session. Make sure the outcomes are actionable, practical, and applicable in their roles.

Application Session Focus

This year's program is organized around five subject areas that reflect the most pressing challenges and opportunities in legal operations. You'll be asked to identify which area your session covers.

AI Training, Implementation & Governance

Explores how legal operations teams are adapting to the growing influence of artificial intelligence. It emphasizes practical approaches to integrating AI into their day-to-day work.

Resource Optimization & Spend Management

Examines how legal departments can make smarter use of their resources while maintaining high-quality service delivery. It emphasizes practical approaches to managing spend and improving operational efficiency.

Career Pathways & Professional Growth

Highlights the evolving career journeys within legal operations, emphasizing growth, mobility, and leadership development. It offers skills and experiences that shape long-term success.

Skills Development (Soft + Technical)

Supports the growth of both interpersonal and technical capabilities essential to legal operations. It encourages continuous learning across communication, leadership, and tool proficiency.

Organizational Design & Future of Legal Departments

Considers how legal departments are evolving in response to shifting leadership expectations and emerging technologies.

Application Session Topic

Main Session Topic

You can find a list of potential main topics below. These are topics that our community has expressed interest in or have been identified by the CLOC Education Advisory Council as pertinent to the community. We also welcome other topic ideas. The topic should be focused and specific.

- Addressing lateral mobility and skills gaps within legal ops
- AI: Building a chat
- AI: Cost-benefit analysis of AI and new tech investments.
- AI: Prompt engineering
- AI: How to demo, test, and select tools
- AI: Impact on legal department roles, structures, and future staffing
- AI: Leveraging LLMs for coding and automation.
- AI: Noise in the marketplace and sustainability of vendors
- AI: Practical application & skills
- AI: Practical tools in daily use (Microsoft Copilot, ChatGPT, etc.)
- AI: Real-world implementation case studies
- Belonging & inclusion
- Building financial acumen
- Comparative models for structuring legal ops teams
- Crisis simulations for high-level executives
- Creating transparency around legal spend for executive stakeholders

Application Session Topic (cont.)

Additional Main Session Topics

- Executive communication and presentation storytelling.
- Evolving expectations of GCs and cross-functional leadership
- Governance, ownership, and risk management
- How legal departments are reshaping work in response to GenAI and workforce shifts
- Legal ops leaders moving into broader business roles
- Legal operations in law firms
- Optimizing internal resource allocation before hiring or outsourcing
- Perspectives from adjacent functions (marketing ops, finance, data)
- Personal career stories (vulnerability, unique journeys)
- Staffing the legal department of the future with fewer resources
- Strategic planning: Aligning with the business strategy
- Technical upskilling in daily technology (Excel, Python, VBA, Power BI)
- Technology: Leveraging your existing tech stack
- Use of ALSPs, shared service centers, and tech to optimize spend
- Using historical matter data to inform future spend decisions
- What legal ops professionals must know about navigating AI governance
- What legal ops professionals must know about partnering with finance
- Other (type in response):

Application Session Format & Duration

Preferred session format

Please review the format descriptions on the following pages. We are always open to new ways of presenting and welcoming new and innovative formats.

- Panel Discussion
- 90 Minute Hour Workshop
- Best Practices Presentation
- Case-Study
- Community Conversation
- Legal Hack
- Fishbowl Discussion
- Role-playing scenarios
- Other (type in response)

Preferred Session duration

Consider the content and objectives of the session when choosing your session timing.

- 10 Minutes (Legal Hack format only)
- 30 Minutes
- 45 Minutes
- Open to 30- or 45-minute duration
- 90 Minute Workshop

Session Format Information

STANDARD SESSION FORMATS

These are the typical session formats you will find at most events.

- **Panel Discussion**
- **Best Practices Presentation**
- **Case-Study Presentation**

UNIQUE SESSION FORMAT DETAILS

These are unique session formats we plan to offer for our highly engaged and innovative audience.

Legal Hacks

Duration: 10 Minutes

Description: Insightful and fast-paced talks featuring innovators in legal operations. In these unique series of short informal conversations, you'll discover the hacks and breakthroughs that have sparked personal and professional growth over the past year.

Format: Informal and intimate talks from a mix of rising stars and thought leaders.

Fishbowl Discussions

Duration: 45 Minutes

Description: A dynamic and interactive discussion format designed to foster engagement and collaboration among participants.

Format: A small group of 3-5 participants will start a discussion. An empty chair will be available for attendees to join the discussion.

Session Format Information (cont.)

Community Conversations

Duration: 30 Minutes

Description: A relaxed, peer-driven format designed to spark meaningful dialogue and connection among participants.

Format: Attendees will gather in small groups of 4 to 6 around roundtables. Each group will be given a central topic to explore together. There will be no presentations. Just open conversation. Participants are encouraged to share experiences, ask questions, and build on each other's insights in an informal setting.

Interactive Role-Playing Session

Duration: 45 Minutes

Description: A hands on, problem-solving format that immerses participants in realistic situations drawn from professional life.

Format: Attendees will be divided into small groups and presented with a scenario that reflects a common challenge or decision point. Each group will work collaboratively to analyze the situation and propose solutions. Active participation, critical thinking and peer learning are the focus.

Workshop (aka Skill Builders)

Duration: 90 Minutes

Description: A focused, hands-on format designed to help participants build and refine specific skills through active learning and practice.

Format: These sessions prioritize interaction and application.

Facilitators will guide attendees through structured exercises, real-world scenarios, and collaborative problem-solving. Participants will leave with tangible tools, techniques, and insights they can immediately apply in their professional roles.

Application

CLOC Core 12

CLOC Core 12 Covered in Session

Legal operations is a multi-functional practice focused on designing, managing, and executing faster, more effectively, and with improved accountability for legal services. The CLOC Core 12 cover the key areas within the legal operations function.

If applicable, please indicate up to 2 CLOC Core 12 that will be covered in your session proposal.



Application Session Audience

Audience Competency

Please indicate the audience's expected proficiency and experience with the subject matter of your proposal.

- **Foundational** – Designed to introduce the audience to the subject matter by providing a fundamental base of knowledge.
- **Intermediate** – Builds on foundational knowledge and goes in-depth with new ideas and methods for application.
- **Advanced** – Builds on established experience and knowledge and encourages the learner to implement ideas, solutions, and processes related to the subject matter.

Target Attendee Segments

Audience segmentation ensures that content is tailored to the specific needs, interests, and expertise of different CGI attendee groups. By dividing the audience into segments based on factors such as industry role, experience level, or areas of interest, CLOC strives to offer sessions that are more relevant, engaging, and impactful. Please indicate which attendee type(s) this session would be tailored to. You can select up to 2.

- Legal operations professional working in a small legal department
- Legal operations professional working in a large legal department
- Legal operations professional working in a law firm
- Legal operations professional working in a non-profit, government, or higher-education role
- Law firm professionals
- Senior level legal professionals
- Entry level legal professionals
- Legal service providers
- Other (type in response)

Application Speaker Guidelines

Having all speakers confirmed when submitting a session proposal for a conference is crucial because it demonstrates thorough planning, ensures the credibility of the session, and allows organizers to evaluate the expertise and relevance of the session to the conference's objectives.

Guidelines

- Submissions without confirmed speakers' details will not be considered.
- Once a session is selected, no additional speakers can be added to the session

Speaker Quantity

- 10 Minute Legal Hacks can have up to 2 speakers
- 30 Minute Sessions can have up to 3 speakers
- 45 Minute Sessions can have up to 4 speakers
- 90 Minute Workshops can have up to 5 speakers/facilitators.

Speaker Registration

Speaker passes are determined by the type of session being presented. The breakdown below outlines the registration benefits associated with each session format. Please note that all speakers are responsible for covering their own travel expenses.

- **Legal Hacks & Community Conversations** – 30% discount on registration fees for speakers.
- **30-45 Minute Breakouts** – Complimentary All-Access event registration for each speaker
- **90-Minute Workshop** - Complimentary All-Access event registration for each speaker

Application Speaker Information

Speaker Information

Below is the information that is collected for each speaker on the session.

- Full Name
- Email Address
- Job title
- Company
- City/State/Country
- Are you currently a CLOC Member?
- Are you currently serving in a volunteer leadership position for CLOC? (e.g., Regional Leader, Committee Co-Leader, Inclusion & Social Impact Council, Education Advisory Council, Board Member, etc.)
- Headshot (not required)
- Biography
- LinkedIn URL
- Demographic Information
 - Gender
 - Ethnicity
 - Race

Industry Role

- Legal operations professional working in a corporate legal department
- Legal operations professional working in a law firm
- Law firm professional
- Legal service provider
- Legal technology provider
- Academic

Application Speaker Experience

Highlight your qualifications and experience related to the topic. Explain why you or your panelists are the right people to present this session.

- Please summarize your experience presenting and/or facilitating.
- Have you presented at the CLOC Global Institute in the past? If yes, please list the year(s).
- Please share a link to a video of you speaking or presentation materials you have previously created.
- Years of experience working in the legal ecosystem
- Do you currently manage a team?

Proposal for Curated Topic Application Questions

Information that is collected in the proposal for a curated topic application.

Application Session Topic

Select the session format and topic from the curated list below:

Practical and Timely 35 Minute Breakout Session Topics:

- What Legal Ops Professionals Must Know About Partnering with Finance
- What Legal Ops Professionals Must Know About Navigating AI Governance
- How Legal Departments are Reshaping Work in Response to GenAI and Workforce Shifts
- Using Historical Matter Data to Inform Future Spend Decisions

30 – 45 Minute Breakout Sessions

- Regional Trends in Legal Operations
- Evolving expectations of GC's and cross-functional leadership
- Perspectives from adjacent functions (marketing, finance, sales, data, etc.)
- Practical AI tools in daily use (Copilot, ChatGPT, etc.)

Interactive 90 Minute Workshops

- Prompt engineering
- Executive communication and presentation storytelling
- Leveraging LLMs for coding and automation
- Finance & budgeting skills
- Crisis simulations for high-level executives

Application Session Information

Session Title (limit of 100 characters)

Ensure the title clearly communicates the session's topic. Avoid vague or overly broad language so attendees know exactly what to expect.

Aim for a short, punchy title. Generally, 5-10 words work best for capturing attention without overwhelming readers.

Session Description (2,000 Character limit)

Keep your description clear and concise but provide enough detail to demonstrate the depth of the content.

List up to 3 learning objectives.

Define clear learning objectives. Outline what attendees will learn or take away from the session. Make sure the outcomes are actionable, practical, and applicable in their roles.

Session Outline

Explain the structure and flow of your proposed session, including key topics, activities, and timing. This helps our reviewers understand how the session will be delivered.

Application Speaker Guidelines

At least one main speaker must be identified in the application. If you do not have other confirmed speakers, please list the planned roles and expertise you plan to select for the session.

If your proposal is selected, all speakers will be expected to be available to travel to the event.

Speaker Quantity

- 10 Minute Legal Hacks can have up to 2 speakers
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- 45 Minute Sessions can have up to 4 speakers
- 90 Minute Workshops can have up to 5 speakers/facilitators.

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- Please summarize your experience presenting and/or facilitating.
- Have you presented at the CLOC Global Institute in the past? If yes, please list the year(s).
- Please share a link to a video of you speaking or presentation materials you have previously created.
- Years of experience working in the legal ecosystem
- Do you currently manage a team?

Proposal Examples

Following are 2 examples of proposals that have previously been selected for the CLOC Global Institute programming.



2025 CGI Session

Session Title: The Return on Effort Framework: Automate, Delegate, Eliminate, Elevate

Session Duration: 45 mins

Session Description: Legal Operations directors are navigating cost management pressures, an evolving legal technology landscape, and the need for workload management tools to prioritize tasks effectively. The presenters will lead a discussion on advancing legal operations with Gen AI and present a framework for corporate legal departments to categorize tasks, identify the right solutions, and maximize their return on efforts. The Return on Effort Framework leverages Gen AI and other technologies to help legal departments:

- Automate repetitive, time-consuming workflows.
- Delegate work and decision-making to the appropriate individuals and teams.
- Eliminate low-value work that is better served by technology.
- Elevate lawyers to operate at the top of their licenses and add greater value to their organizations.

Practical takeaways you plan to provide the audience:

CLO's and Heads of Legal Operations need to point lawyers' energies in the right places to ensure they're getting the most return on their efforts. From this session, the audience will:

- Receive a framework that supports workflow analysis and guides the allocation of people, technology, and services against the total work demands of the legal department.
- Learn about the latest Gen AI technologies that can enhance efficiency and effectiveness.
- Gain insights and examples of how to implement this framework in medium to large legal departments to maximize the value of legal teams.

Confirmed Presenters (actual names have been removed)

Managing Director of Legal Business for a Legal Services Provider

Professor of Law at a Private Research University

Main Topic: Generative AI: How it is being leveraged across professions

CLOC Core 12 Covered in Session: Practice Operations, Technology

Audience's Proficiency: Intermediate

Format: Presentation

2024 CGI Session

Session Title: Building a Ladder to the Stars: Creating a Legal Services Vision and Implementing It

Session Duration: 50 Minutes

Session Description:

A discussion on how CLOs/GCs and Legal Operations can partner to develop a future legal services vision and implement that vision. Chief Legal Officer and Head of Global Legal Operations, will share their journey, including:

- How and why the CLO vision was created
- Their services model to implement the vision
- The essential, but challenging, role of Legal Operations in delivering the vision
- Successes, challenges, learnings from their journey
- The importance of the CLO and Head of Global Legal Operations relationship.

Practical takeaway you plan to provide the audience: You can and should dream big, but you need a clear plan of how to get there. Implementing the plan is hard: the CLO and Head of Legal Operations need to be aligned; you must learn from your failures and celebrate your successes; and always keep moving forward.

Confirmed Presenters (actual names have been removed)

Head of Global CLO Operations & Innovation in Corporate Legal Department

Chief Legal Officer in Corporate Legal Department

Main Topic: Perspectives from GCs & CLOs

Audience's Proficiency: Foundational

Format: Case Study

The 2026 CLOC Global Institute Call for Proposal Submission Sites



• [Welcome](#) > • [Login](#) > • [Session Details](#) > • [Speaker Info](#)

Submissions will be accepted until Tue November 4, 2025, 2:00 AM CST
Submission Limit: 3 submissions per user

2026 CLOC Global Institute Call for Proposal Submissions

[Submit a Proposal](#)



• [Welcome](#) > • [Login](#) > • [Session Details](#) > • [Speaker Info](#)

Submissions will be accepted until Tue November 4, 2025, 2:00 AM CST
Submission Limit: 3 submissions per user

2026 CLOC Global Institute Proposal Submission for Curated Topic

[Submit a Proposal for a Curated Topic](#)

Please note, there are two different submission websites. One for a standard proposal submission and one for the curated topic proposal submission.

Questions?

Contact:

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