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.

Choose Your Path

Call for Proposals

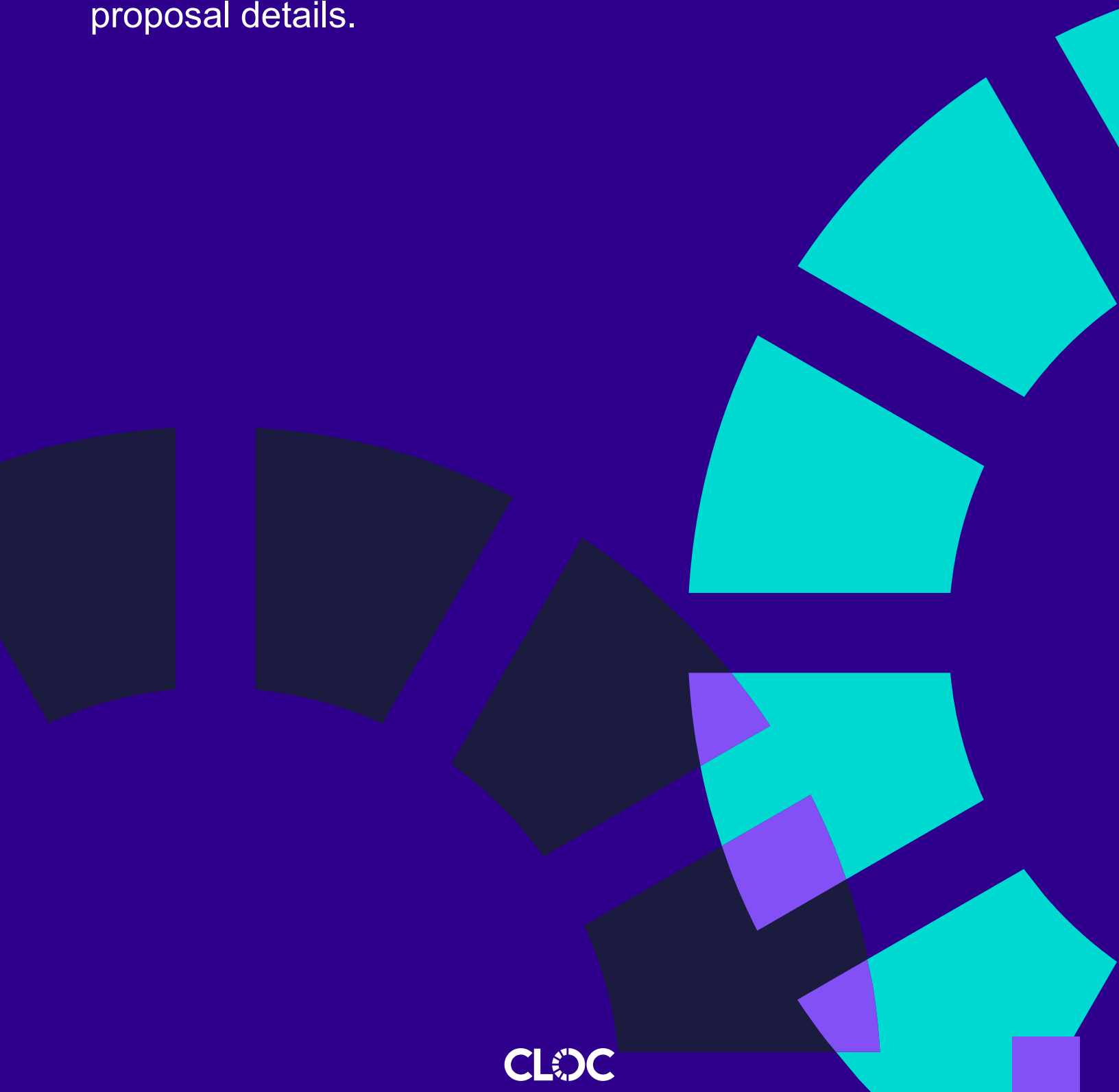
Submit original session ideas that reflect your unique insights, innovations, and experiences. Whether proposing a solo talk, panel, or workshop, you shape the content from the ground up. You design the format, define the learning objectives, and build an engagement style that resonates with the audience.

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

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



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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. *Not necessary for the Curated Topic pathway.*

- **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 200 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 Global Institute Speaker Agreement.

Make note of these important dates.

November 3, 2026: Submission deadline

January 15, 2027: Proposal decision notification sent to all applicants.

March 2027: Meet with the CLOC Team to discuss session development and content.

March 31, 2027: First draft of session content due.

April 16, 2027: CLOC Team provides feedback on session content.

May 3, 2027: Final version of content due.

Call for Proposals Application Questions

Must Have
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 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 Program Theme

This year's program is organized around four subject areas. You will be asked to select which theme your session aligns with.

Practical: AI, Automation & Human Judgment

Share practical approaches to using AI, agents, and automation in legal operations. We're looking for real workflows, implementation lessons, prompting, adoption, oversight, and examples that show where technology creates value and where human judgment remains essential.

Strategic: Connecting Legal Ops to the Business

Explore how legal ops can contribute beyond execution and play a more strategic role in the business. We're looking for real-world examples that connect legal ops to business priorities, executive decision-making, operating models, budgets, M&A, pricing, and measurable value.

Adaptive: Navigating Change & Complexity

Share practical approaches for navigating the uncertainty and complexity that come with changing technology, leadership, budgets, organizational structures, and responsibilities. We're looking for real experiences and useful strategies for keeping teams focused, influencing without authority, and working through change.

Connected: Influence, Communication & Career

Explore the skills that help legal ops professionals communicate effectively, build trust, navigate challenging conversations, and grow their careers. We're looking for practical approaches to executive communication, storytelling, influence, personal effectiveness, career development, and peer learning.

Application 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.

Practical: AI, Automation & Human Judgment

- AI Prompt Libraries & Reusable Workflow Prompts
- Deploying, Supervising & Governing AI Agents
- Signal vs. Noise: AI & Tech Trend Briefings
- Practical In-House LLM Case Studies

Strategic: Connecting Legal Ops to the Business

- Legal Operations Playbooks & Operating Models
- Industry Benchmarking Dashboards & Demonstrating ROI
- The Pricing Reset & Vendor/Outside Counsel Governance
- General Counsel Priorities & Executive Alignment

Adaptive: Navigating Change & Complexity

- Change Management & Organizational Transformation
- Operational Pivoting & Budget Agility
- Right-Sizing Legal Ops for Small & Resource-Constrained Teams
- Tech Stack Governance & Contract Cycle Volatility
- Scenario-Based Disruption Case Studies (M&A, IPOs, Leadership Turnover)

Connected: Influence, Communication & Career

- Executive Communication
- Data Storytelling
- Career Pathway Navigation
- Interpersonal Dynamics & Influence Without Authority

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 Workshop
- Best Practices Presentation
- Case-Study
- Legal Hack
- Fishbowl Discussion
- 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 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.

Workshop

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

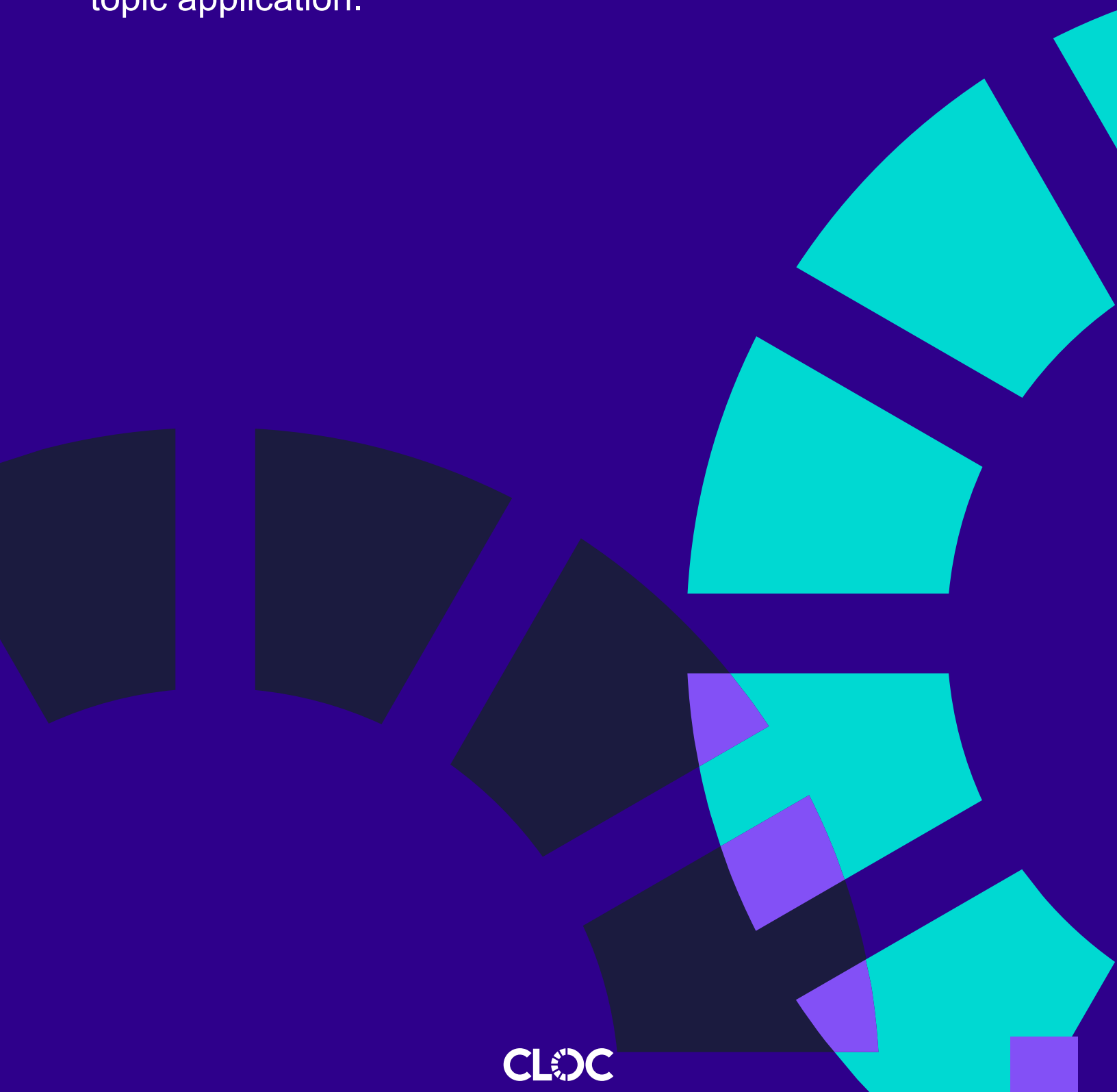
Application
Speaker Experience

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.



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Application Session Topic

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

Practical and Timely 35 Minute Breakout Session Topics:

- **PRACTICAL**: AI Field Guide & Demystifying AI Law Firms: Provides decision frameworks to navigate PE-backed AI law firms vs. traditional law firms and ALSPs, detailing procurement guidance and internal tool usage.
- **STRATEGIC**: General Counsel (GC) Priorities: Annual flagship session tracking shifting GC concerns, strategic leadership goals, and aligning legal ops deliverables directly with GC expectations.
- **ADAPTIVE**: Operational Pivoting & Organizational Resilience: Practical frameworks for legal ops teams to adapt when facing sudden budget cuts, GC/executive transitions, M&A integrations, or rapid role expansions without losing strategic focus
- **CONNECTED**: Executive Communication & Influence Without Authority - Mastering data storytelling, executive presence, and interpersonal dynamics to navigate difficult conversations, manage competing working styles, build cross-functional trust, and translate operational data into executive value

Topics continue on the next page….

Application Session Topic (cont.)

30 – 45 Minute Breakout Sessions

- **Keeping Up with AI & Technology**
  Practical approaches for tracking rapid technology developments, cutting through the noise, and helping legal teams understand what matters and what is worth exploring.
- **AI ROI & Real-World Use Cases**
  Examples, data, and approaches for evaluating AI investments, measuring productivity and business impact, and separating meaningful results from hype.
- **Legal Tech Adoption, Vendor Management & ROI**
  Practical lessons for getting lasting value from legal technology, including adoption challenges, underused tools, vendor management, contract decisions, and pressure to adopt based on what peers are doing.
- **Legal Ops in the Real World**
  Grounded, day-to-day legal operations work, including the challenges, decisions, processes, and problem-solving that keep legal teams running effectively.
- **Navigating High-Stakes Business Events**
  Scenario-based sessions focused on how legal ops teams prepare for and respond to events such as M&A, IPOs, leadership transitions, major organizational changes, or unexpected budget cuts.

Interactive 90 Minute Workshops

- **Legal Engineering & Role Specialization**
  Emerging roles, technical skill sets, and career paths within legal operations, with practical examples of how teams are defining and developing specialized capabilities.
- **Working Styles & Interpersonal Dynamics**
  Practical approaches for navigating different working styles, difficult conversations, competing priorities, and cross-functional collaboration, particularly when you need to influence without direct authority.

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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- Legal service provider
- Legal technology provider
- Academic

Application
Speaker Experience

Highlight your qualifications and experience related to the topic. Explain why you or your co-presenters 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 Examples

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

2026 CGI Session

Session Title: The CFO's Love Language: Financial Fluency for the Modern Legal Leaders

Session Duration: 45 Minutes

Session Description: Are you are a senior legal operations leader? Do you want to move horizontally into leading business operations within your firm or other firms? Do you want to deep dive into the world of financial metrics and learn about what metrics matter for your company to your CEO, CFO and hence the CLO/GC? If yes, we have got an interactive, fun, TED styled panel talk for you! As we take the attendees through the fascinating world of key financial metrics (think beyond ARR, Rule of 40 and more) in discussions with panelists, we will deep dive on why a metric is considered important, for which kind of companies, and how these metrics change through the lifecycle of a company- whether a start up, mid level company, recently listed company or a larger organization. We will then also look at AI prompts that attendees can use to find/understand/learn these metrics for their organizations and other public companies.

Practical takeaways you plan to provide the audience:

1. Financial metrics for Executives
2. How Financial metrics change through lifecycle of company along with any industry/sector specific key metrics.
3. How can we use Gen AI prompts to find/understand/learn more about these metrics

Confirmed Presenters (actual names have been removed)
Director of Legal Operations at In-House Organization
President and CEO of a Legal Talent Organization
Legal Technology and Operations Leader at Large Technology Company

Main Topic: Legal operations leaders moving into borader business roles
CLOC Core 12 Covered in Session: Financial Management and Business Intelligence
Audience's Proficiency: Advanced
Format: Panel Discussion

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:

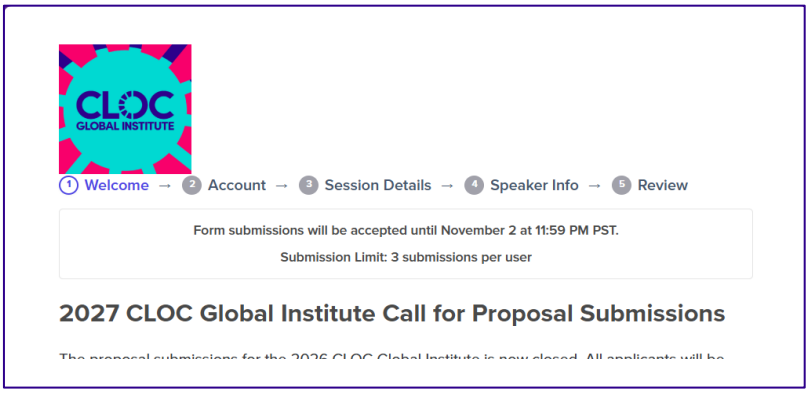
CLO's and Heads of Legal Operations need to point lawyers' energies in the right places to ensure they're getting the most return on their efforts. From this session, the audience will:

- 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

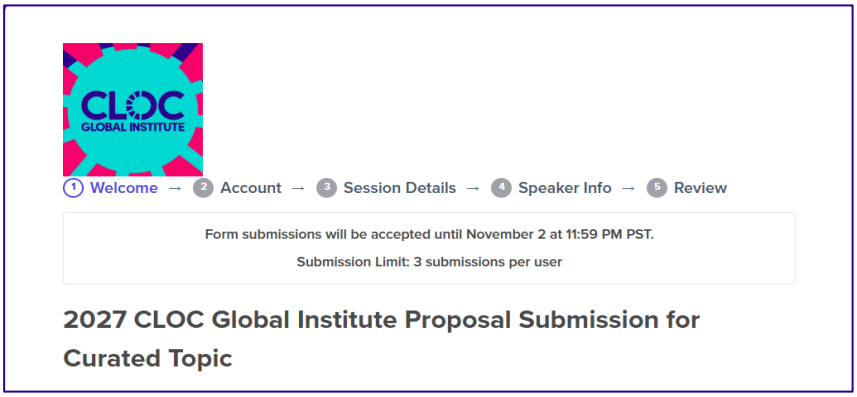
Main Topic: Generative AI: How it is being leveraged across professions
CLOC Core 12 Covered in Session: Practice Operations, Technology
Audience's Proficiency: Intermediate
Format: Presentation

The 2027 CLOC Global Institute Call for Proposal Submission Sites



Submit a Proposal

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



Submit a Proposal for a Curated Topic

Questions?

Contact:

Nicole Zafian, VP Learning & Engagement

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