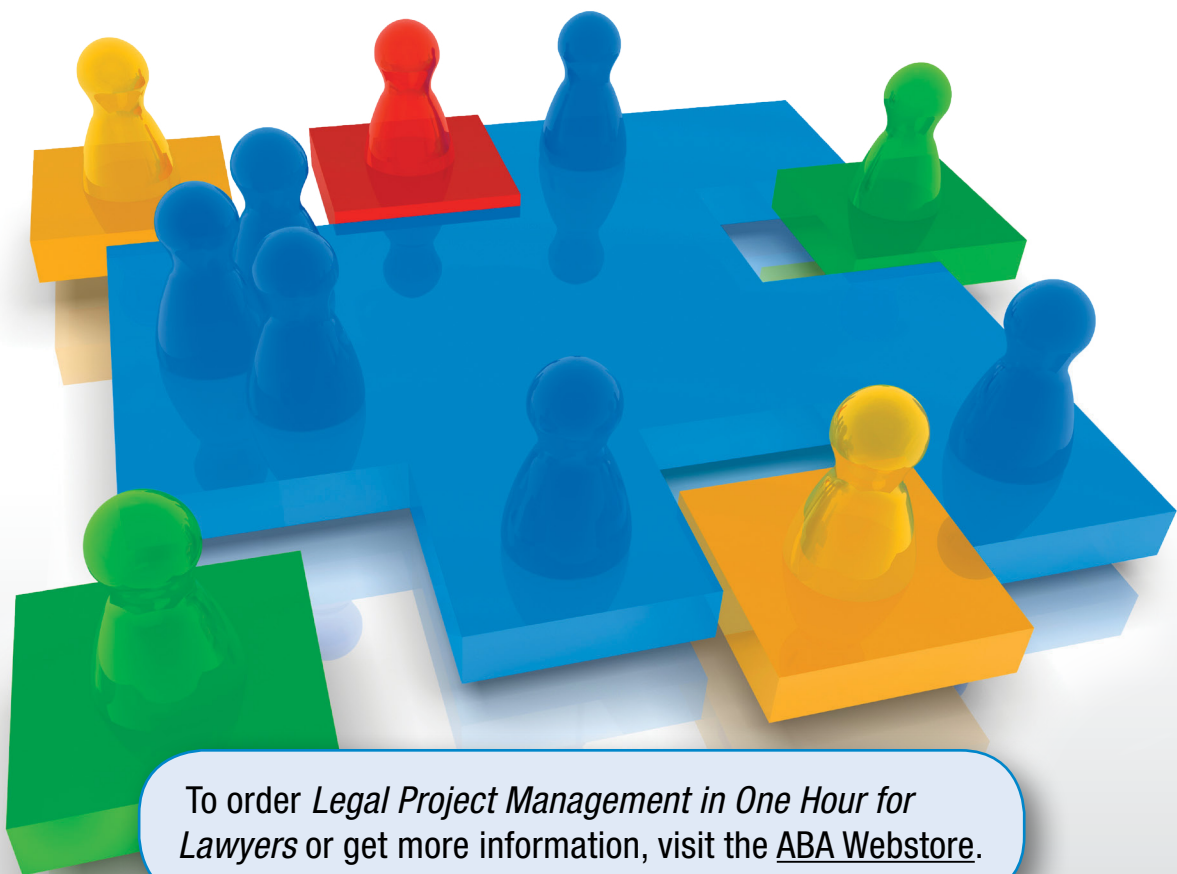


Legal Project Management

in One Hour
FOR LAWYERS

PAMELA H. WOLDOW AND DOUGLAS B. RICHARDSON



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Flyover at Thirty Thousand Feet

To put all that follows in perspective, let's start with a basic working definition of legal project management. It is...

- a systematic approach
- for scoping, planning, managing, and controlling legal work
- within clearly understood—by both law firm and client—time, budget, and performance requirements
- that also captures lessons learned after a project is complete in order to enhance future performance.

Managing Uncertainty

At its core, legal project management (LPM) is about two things:

- performing legal work more efficiently and
- managing uncertainty.

LPM focuses attention on driving greater consistency and efficiency into decisions and judgments that lawyers make in response to widely varying situations. LPM recognizes that legal issues are not always precisely controllable and that a client's legal goals may not always be

attainable, no matter how skilled the lawyers. The forms of project management that are common in the industrial sector—particularly manufacturing, technology, and research—focus on delivering invariant results and producing identical, repeatable outcomes. LPM is different. It focuses on delivering *value* as efficiently as possible *under the circumstances*.

Why This? Why Now?

The crux of the rapidly escalating LPM trend is this: today, in the face of unprecedented financial and budget pressures, legal clients are demanding greater control, predictability, accountability, and responsiveness from their outside legal service providers. They are sending their business to those who can demonstrate these qualities, and they are withdrawing business from those who can't or won't.

ANECDOTAL EVIDENCE # 1: The Headline Says It All

“Balfour Beatty to Slash Legal Spend by 30 Percent in Panel Review: Construction giant Balfour Beatty is looking to save up to a third of its external legal spend by packaging certain areas of work and tendering out to the lowest bidder.” (The Lawyer, November 7, 2012)

Having already trimmed internal expenses to the bone, general counsel now are looking for ways to reduce outside legal spend, which typically eats up approximately 55 to 60 percent of all corporate legal budgets. All types of rate squeezes are now common, with clients pressing for discounted rates, capped fees and budgets, or various kinds of alternative fee arrangements built around project-based or value-based fees rather than time-based (hourly) billings.

What Do Clients Want, Anyway?

LPM's growth has been fueled in particular by increasing client pressure for changes in the way legal services are priced and billed. LPM is developing a solid track record for providing what clients want from their lawyers:

- **value conferred** as viewed through the eyes of the clients
- **efficiency:** managing to budget, lean and efficient staffing, lower outside legal spend
- **predictability:** no costly surprises, fewer unexpected events
- **communication** that is timely, responsive, accurate, and complete
- **understanding** all aspects of their businesses, not just their legal needs
- **alignment** between the client's interests and the firm's behaviors

For first-adopter and first-follower law firms, the LPM train has left the station and is fully up to speed. Large firms may have been pioneers in adopting LPM best practices, but these practices are trickling down to mid-size and smaller firms,¹ who are adapting LPM precepts to fit their clients and their firm's resources.

The Proactive Firm: Building a Collaborative Alliance with Clients

The fact that clients have assumed a more dominant role in shaping legal service delivery does not mean that firms should just sit idly by, waiting

¹ LPM benefits obviously are of great relevance to legal departments, as well as law firms, and some legal departments have commenced internal LPM initiatives. While this book is targeted primarily to lawyers in law firms of various sizes, its basic precepts are generally equally applicable to any legal setting.

There is a major distinction between law firm and legal department LPM initiatives, however. Legal department LPM efforts are intended to generate greater efficiency and consistency within a corporate cost center, certainly a laudable goal. To that goal, law firm LPM adds the crucial driver of profitability. In today's legal climate, firms that cannot perform efficiently cannot perform profitably. Hence this book's strong emphasis on implementing LPM within law firms.

for the clients to call the shots. Taking a proactive posture has become very important. Law's "new normal" offers extraordinary potential benefits to firms that take the initiative and reach out to clients in order to build joint, LPM-related processes and protocols.

ANECDOTAL EVIDENCE #2: Orrick and Levi Strauss

In 2009, at a point when global clothing giant Levi Strauss was using the services of several hundred law firms, *The Wall Street Journal* reported that the company's legal department was suffering a huge and immediate budget cut. Obviously, this represented a daunting challenge to Hilary Krane, Levi Strauss's general counsel. Certainly this also was an opportunity for the outside firms to render assistance, to brainstorm and collaborate about ways to accommodate the budget squeeze.

So how many firms did so? Only one. A young partner at Orrick, Herrington & Sutcliffe saw this situation as an incredible opportunity, and she contacted Krane. She said that if Levi Strauss was willing to share detailed information about all its legal needs, legal services, and legal spend—confidentially, of course—Orrick would develop an omnibus service proposal for providing all needed legal support for an all-inclusive, flat fee. Kane appreciated this novel approach and supplied all the information Orrick needed to develop a comprehensive service proposal—not an easy task because alternative fee arrangements were new to the firm, too, and because it was essential for profitability that the firm deliver all services efficiently.

Levi Strauss accepted the novel proposal, and Orrick went from being just one of many providers to handling all Levi Strauss legal work worldwide (except for some intellectual property work sent to a second firm). Clearly creativity and the willingness to break new ground, coupled with a proactive approach, had produced an extraordinary success. For Orrick, working efficiently, managing work carefully, and incorporating learnings from its innovative role proved essential to bolstering firm profitability.

Clients' Personal Perspectives

Law firm lawyers too often forget that general counsel and chief legal officers have skin in the game as well. That is, senior in-house legal leaders are evaluated, compensated, and bonused—even sometimes punished—based on the performance of the departments they manage. More than one general counsel has been terminated because of a persistent failure to rein in legal spend.

During the depths of the recession that started in 2008, salaries for many general counsel were frozen or even reduced, and their annual bonuses decreased dramatically—by an average of 40 percent, according to one study. This added dimension of personal pain meant that law department leaders were bound to respond enthusiastically and gratefully to anything that would help them reduce their legal spend and stretch ever-tightening budgets.

Another Benefit: Getting Laterals in the Loop and Up to Speed

LPM also has another notable virtue: it speeds and smooths the assimilation of lateral hires. In an era where firm-jumping is now very common, partners and associates who join a firm laterally often struggle to get on board, get up to speed, and adjust their working style to accommodate “the way we do things around here.” Historically, law firms have not done a terrific job with taking on lateral hires, which results in a striking number of them failing to take root and later moving on. A firm with a clear set of LPM best practices, however, presents lateral hires with a stable and transparent performance platform during those first crucial months of trying to fit in, collaborate with colleagues, and contribute rapidly to the profitability of the firm.

What LPM Means to You

One of the key objectives of this book is to make LPM less daunting. As we'll discuss in greater detail, it is understandable that the average lawyer worries about LPM's transformative implications: it's likely to make big differences in almost every lawyer's life. But putting your head in the sand simply is not an option.

Regardless of the size of your firm or the nature of your clients, these days you really do need to know about LPM: understand its basic mechanics and appreciate how it will impact your firm's marketing, service delivery, and profitability, in both the near and long term.

For those only now coming to understand and accept LPM's implications, it is certainly not too late to catch up. Some firms still hope that the legal service infrastructure will revert to "the old days," but that simply is not going to happen. Firms that fail to adapt stand to lose market share to those who assertively embrace more efficient and predictable service delivery methods.

If you think your clients somehow escaped the financial pressures of recent years or are indifferent to the efficiency and cost-effectiveness of their outside counsel, you are not talking to your clients enough. Some may feel the pinch more than others, but the vast majority report intense pressure from management to pare down outside legal spend and avoid costly surprises. They may not all know what legal project management is, but they all want what it provides.

WHAT YOU SHOULD DO

Do some intensive fact finding and reality testing.

First, **compare your initial fee estimates or your project budgets with the actual fees** you ended up charging for various engagements. You are likely to find that these numbers do not align very consistently.

Second, if you think your firm already has systematic approaches for scoping, planning, managing and controlling legal work, **talk to your associates**. They will tell you there are as many different ways of doing a deal or handling a piece of litigation as there are partners responsible for them.

Third, **have a heart-to-heart talk with your clients**. They will tell you that no matter how excellent your legal firm's legal expertise, they continue to be frustrated by your ever-escalating rates, budget overruns, spotty communication, and tendency to use their matters as training grounds for your associates.

What We Can Accomplish in an Hour

You will not become a proficient LPM expert simply by reading this book. You won't acquire all the hands-on skills and master all the techniques you need to be an LPM superstar. However, by the time you finish reading, you will be conversant in the basic language of LPM and be able to apply some basic LPM principles to your practice and your relationships with clients. Specifically, you will come away with:

- a general understanding of LPM features and benefits,
- approaches for negotiating project scope and budget with clients,
- ability to better align your legal work with client needs and priorities,
- tools for improving communications, both with internal team members and with external clients and constituents,
- tools and techniques for developing accurate cost estimates and managing to budget,

- familiarity with LPM technology—software, tools, and templates,
- a sense of how to integrate LPM tools and techniques to leverage time and effort,
- the ability to tie LPM to improved business development, client trust, and knowledge management.

Making the Implicit Explicit

This book also can help you break some inefficient habits in your management style. Each of you has your own unique way of doing things. Unfortunately, your idiosyncratic preferences and style also are breeding grounds for collaboration disconnects when you are trying to work interdependently with other lawyers—which these days is most of the time.

It's common for lawyers responsible for legal engagements to use a centralized “hub-and-spokes” approach to planning and managing. Other performers and stakeholders are, so to speak, positioned around the rim of the wheel, connected to the “hub lawyer” by direct manager-subordinate spokes—but not necessarily connected with each other.

Such centralized control and communication often produces project team members who can't see the big picture, don't know each other, aren't familiar with each other's areas of expertise, don't know how their roles relate to those of others, and aren't clear about their responsibilities or limits of authority.

These gaps and lapses result in expensive inefficiencies: redundant work, dropped balls, gaps in accountability, do-overs, write-downs, write-offs... and, most important, frustrated clients.

As author Jim Benson writes in his book *Personal Kanban*, “We are told to do work, but we don't understand why. We crave and deserve context. Without context, just being told what to do is a communication failure.”

WHAT YOU SHOULD DO

Take a moment to reflect on your own management style. Focus on whether it fosters or discourages collaboration and communication. Ask a few partners how they would describe your management style. If you realize that you are regarded as highly autonomous, overcontrolling, overcautious, turfey, overemotional, pusillanimous, or undercommunicative, consider engaging the services of a qualified legal coach who can help you cultivate more collaborative management skills.

LPM provides a different approach for planning and managing work and a different model for legal working relationships: *LPM makes implicit things explicit*; that is, *open, clear, accessible, and repeatable*. We're going to talk about this a lot more in coming pages.

Dealing with Resistance— Yours and Your Colleagues'

Maybe you're turned off to the whole idea of legal project management, perhaps because you are incorrectly analogizing it with other kinds of project management that are common in industry, manufacturing, or research settings.²

2 Industrial project management disciplines, such as Six Sigma, CPM (critical path method), PERT (project evaluation and review technique), Lean, Lean Six Sigma, PROMPT, PRINCE2, PRISM, or Kaizen, all can be plodding, highly quantitative, fiendishly complex, strongly IT-driven, and designed, above all, to impose absolute uniformity and precision on the task of producing identical things—razor blades, widgets, or stealth bombers. They're valuable, but ponderous.

These disciplines are not intended to foster creativity and innovation. 3M, for example, introduced Six Sigma in the late 1990s and found that “the Six Sigma process killed innovation at 3M,” as one 3M “Ambassador,” put it. When the internal 3M Six Sigma champion was queried about its damping effect on creativity, he said it was never designed for to foster creativity; it was simply designed for manufacturing control when the company was starting to scale up a product.

We do admit some admiration for a different project management methodology called Agile, a dynam-

In fact, the discipline of LPM—*legal* project management—is most assuredly *not* the same as industrial project management transplanted into a professional services environment. Perhaps industrial project management’s focus on producing identical and repeatable outcomes has led you to think that LPM will cramp your style or impair your creativity.

In any event, it’s not uncommon for many lawyers, particularly senior partners, to resist or dismiss LPM because they worry that it:

- will impose a steep learning curve and require them to master a whole new vocabulary, suite of IT tools, and procedural protocols;
- represents an inflexible, mechanistic approach that will devalue their experience and judgment, curtail their discretion, reduce their authority, and negatively impact their compensation;
- will add an additional layer of work to their already over-taxed schedules;
- will diminish firm profitability by limiting the time and tasks that can be billed to the client;
- will reveal how inefficiently the firm has managed work before;
- won’t really work—with their practices, their colleagues, and their clients.

These apprehensions are not entirely unfounded. Some legal firms’ attempts to apply industrial project management approaches and technology to planning and managing legal work have resulted in considerable frustration, a lot of wasted time and money, and a frequent lack either of

ic departure from the slow, step-by-step “waterfall” architecture of traditional industrial project management systems. Agile emphasizes constant team collaboration, rapid feedback, and continuous adaptation as events unfold. For this reason, it can be quite effective in professional services settings. It works well for small-scale projects (even leaderless projects in which team members assume various management/supervision responsibilities) and situations where rapid delivery time is imperative. Agile methodology calls for constant “team scrums” in which team members detail their activity to their colleagues, running quickly through “yesterday, today, and what’s in my way?”

increased efficiencies or lawyer buy-in. But overall, the trend is clear: LPM works, and more and more firms and lawyers are trying it—and liking it.

Expanding Out, Trickling Down

LPM now has an accepted set of best practices, a rapidly evolving set of IT providers and tools, ardent internal advocates, and sophisticated practitioners in diverse practice areas. Law schools are installing LPM courses alongside other core courses. As LPM has gone global, it has proved its worth as a way of integrating the cultures and operations of firms with offices in various countries and cultures. Australia's eight-hundred-lawyer Mallesons Stephen Jaques, for example, built out a sophisticated internal LPM function even as it completed its merger with a one-thousand-lawyer Chinese firm to become King & Wood Mallesons.

Perhaps more relevant, in the United States the trickle down has reached many smaller firms and smaller clients. Midsize, regional, and local firms find that implementing LPM is a great equalizer and an excellent marketing tool for competing effectively with larger competitors on both price *and* efficiency.

Yes, some lawyers in smaller markets claim, in effect, that “our clients don't know about LPM and don't care about LPM. For us, it's business as usual.” At this point, it may still be true that some in-house counsel are as ignorant of LPM constructs as their outside law firms are.

Yet whether they know about LPM or not, virtually all of them say they want what well-implemented LPM delivers: greater predictability of legal spend, better budget management, fewer surprises, and better communication with outside counsel.

WHAT YOU SHOULD DO

Get with the program. Accept the reality that LPM represents the new face of legal service delivery and the best approach for optimizing client relationships in law's "new normal."¹

1 Master blogger Paul Lippe, founder and CEO of Legal OnRamp and one of the very few people named as a Legal Rebel by the ABA, now writes a column for the ABA called The New Normal. It should be required reading for lawyers fighting to stay ahead of the curve. See http://www.abajournal.com/legalrebels/article/welcome_to_the_new_normal.

A Disclaimer

You will note in the following pages, there will be some anecdotes and examples where we identify the firms and clients involved. We know this adds interest and real-life immediacy.

There are others where we cannot disclose the identity of the participants, for a number of reasons: Perhaps some have been clients, and we have worked with them pursuant to nondisclosure agreements. Perhaps some have provided us with proprietary information but asked that we disguise it to protect confidentiality. In some cases, we want to avoid the implication that we are advocating or recommending certain firms, products, or services. In any case, when identities are revealed, it is either because the information has been reported in the public domain or because we have been granted explicit permission to use names.

LPM 101

Basic LPM Building Blocks

Regardless of its form, complexity, or application, legal project management is predicated on three core principles:

- **Front-end planning is better than damage control.**
- **Keep all crucial stakeholders in the loop all of the time.**
- **If it can't be measured, it can't be managed.**

These axioms express themselves in a cascading sequence of stages and action steps, none of which can be done well unless all antecedent steps have been done well.

In the following chapters, we will break LPM methodology into five sequenced steps.

The Five Steps of Legal Project Management

1. Defining Project Objectives and Scope

- information gathering to understand the client's business, needs, and expectations
- discussions with the client to agree upon project phases, deliverables, and desired outcomes
- discussing project scope, time, and cost
- agreeing on billing arrangements
- discussing possible events or risks that may impact the engagement

2. Project Planning

- defining project phases, tasks, and performance standards
- developing timelines and milestones
- selecting the project team (firm side and client side)
- budgeting
- getting appropriate tools in place
- planning communications
- planning approaches for handling unexpected events and risks

3. Executing the Plan: Doing the Legal Work

- deploying the right lawyers to the right tasks
- making task assignments and delegating authority effectively
- giving timely, objective, and specific feedback
- managing team performance, dynamics, and morale
- ensuring collaborative team and client communication

4. Monitoring and Measuring Progress

- tracking progress of phases and tasks
- avoiding scope creep, bottlenecks, redundancies, or other inefficiencies
- tracking budget-to-actual
- making project adjustments when unexpected events occur

5. Post-Project Review

- evaluating outcomes in terms of agreed project scope
- identifying what went well and what needs improvement next time
- discussions with client to give and get real-time feedback
- identifying lessons learned, resources needed, and surprises that can be avoided
- aligning post-project review with the firm's knowledge management function to aggregate cumulative learning and put it in a form accessible to all in the future

Experienced lawyers are bound to assert that they already do all these things in some way, shape, or form. That last phrase is often the efficiency killer and budget buster, because it reflects the vagueness, subjectivity, personal preferences, and lack of transparency that often mark how legal projects are scoped, planned, managed, and measured.

LPM is designed to provide a clear and consistent context for lawyer performance and client communication. As one converted skeptic exclaimed to the colleagues on his highly specialized client team, “Try it! You’ll like it. C’mon in, the water’s fine.”

Defining Some Important Terms

Before we dig more deeply into LPM methods and processes, we should clarify a few essential terms, concepts, and acronyms useful in understanding LPM.

What Is a Project?

For LPM purposes, think of a project as any single—and singular—endeavor that has a distinct beginning, middle, and end and that produces agreed-upon deliverables and objectively measurable outcomes. (This may seem obvious, but this definition distinguishes projects from continuous or indefinitely continuing activity, such as processing claims or bottling soft drinks.)

A legal project may take the form of any kind of client mandate: an entire engagement, a single matter, a particular transaction, a piece of litigation, or a group of cases. It may be complex or straightforward, short or protracted, but at some point it *is over*.

Projects generally are made up of a sequence of component **phases**. To the people working on a complex phase (such as document review in an antitrust matter or due diligence in a financial transaction), each phase may seem like a project—something that's done when their contribution to it is done. Overall, however, LPM's job is to bring order and control to the big picture—to an end result as envisioned and desired *by the client*, not as perceived by those doing legal work.

Phases, in turn, are made up of a variety and aggregation of **tasks**; that is, discrete activities assigned or delegated to specific performers. The job of LPM is to bring many interrelated tasks together to produce an efficient and coherent whole.

What Is a Project Manager?

In LPM, this can be something of a trick question. For one thing, lawyers and law firms tend not to use the term *project manager*, because it did not originate in the legal profession. Lawyers have their own functional labels—and often they don't have any labels at all that bear on their roles in LPM.

In law firms, the allocation of power and responsibility for a project often flows in markedly different channels. In other words, the *finders* (rainmakers) and the *minders* (client-relationship partners) may be entirely different from the *grinders*—that is, the people responsible for actual execution of legal work.

Therefore, sometimes the project manager role is automatically assumed by the senior client-relationship partner. Or it can end up being assigned to an up-and-coming junior partner, a precocious senior associate, or even a seasoned senior paralegal, if the project manager role focuses mainly on administrative oversight and “herding the cats” once a matter is under way. In firms with a cadre of professional LPM staff riding shotgun and lawyers performing the legal tasks, the project manager title may even be given to a non-lawyer. And, unfortunately, all too often, project management responsibility is assigned to...nobody.³

Frankly, who—if anyone—carries the project manager *title* is probably not all that important. What is absolutely crucial, however, is that every engagement or matter has one or more clearly designated *owners* who bear accountability for 1) successful completion of all project phases and tasks on time and on budget, 2) keeping the team fully informed and up to speed, and 3) the quality of the project team's legal work.

³ The Agile methodology previously mentioned sometimes does not appoint a single project manager; instead, it has a highly collaborative “leaderless team” that spreads responsibility and accountability among various team members. In Agile leaderless teams, however, it's not accurate to say that no one serves as project manager; everybody serves as project manager.

These different accountabilities may or may not all vest in the same person, and that can create problems. If it is not clear to all team players and stakeholders who the appropriate go-to people are for each phase and task, obviously the quality and consistency of legal service are put at risk.

Just Who Is the Client?

This question is more a warning than a definition. Lawyers at all levels often refer indiscriminately to “the client,” a sloppiness that produces frequent gaps in communication. For example, when someone in the firm asks, “What did the client say about our bill?” or says, “Hey, call the client!” Does the term refer to:

- the name of the business entity that has engaged the firm,
- the general counsel or perhaps the chief financial officer (to whom many general counsel report these days),
- a business unit head for whom a project is being performed,
- a lower-level member of the corporate legal staff with whom law firm lawyers or paralegals may interact (perhaps without the knowledge of their superiors)?

As we’ve said, LPM can serve as a powerful communication engine that can bridge the traditional communication gap between law firms and their clients. As described more fully in Chapter 4, LPM takes great pains to assure that the right types of communications are directed to the right recipients at the right times.

What Is LPI and How Is It Different from LPM?

LPM sometimes is confused with LPI, or **legal process improvement**. They sound a lot alike, and the line between the two disciplines often blurs because both are instrumental in the quality and efficiency of legal

service delivery. But the substance of each is quite different. The main components of LPM are the planning and organization of project phases, tasks, and teams, and the mechanisms for monitoring progress against project performance standards, particularly those relating to project scope, time, and cost. LPI, on the other hand, describes a discipline devoted less to how legal tasks are planned and managed, and more to improving the efficiency with which particular legal tasks are performed, including reducing the time it takes to do them and the number of steps a particular task takes to complete.⁴

What Are AFAs?

LPM owes at least part of its momentum to the emergence of various kinds of **alternative fee arrangements** (AFAs). AFAs are assuming increasing importance in the legal marketplace because more and more clients are insisting on them as a lever to lower outside legal spend by imposing billing approaches based on the *value* (to the client) of the work performed, rather than on the *time spent* performing it.

In place of time-based billing, value-based billing puts a negotiated value on project outcomes and deliverables, sometimes with a bonus or kicker for exceptional results. The most common AFAs are flat or fixed fees negotiated either on specific matters or whole tranches of legal work. In several extraordinary cases, firms have won all of a client's legal work by proposing AFAs for any and all client work.

These days, a great many clients demand significant fee discounts or mandate capped, not-to-exceed fees. Strictly speaking, these are not AFAs, since fees remain pegged to time-based billing. Nonetheless, they do reflect clients' need for predictive accuracy and budget certainty, as well as

⁴ See, for example, *The Legal Process Improvement Handbook*, by Chris Bull, Ark Group/Wilmington Publishing & Information, 2012.

clients' increasing impatience with annual law firm billing rate increases that exceed the rate of inflation and are what clients perceive as overbilling or "overlawyering."⁵

There obviously is a direct nexus between the trend toward AFAs and client demands that legal work be done efficiently. Those demands, in turn, are fueling the LPM trend and are exerting pressure for greater efficiency even in engagements not conducted under alternative billing arrangements.

Scalability

LPM is **scalable**. That is, it is a flexible, common-sense framework whose design and application can be adjusted to fit projects of widely differing sizes, complexities, and durations. Its basic precepts and phases, however, provide a consistent foundation for efficient performance, regardless of application.

Many uninitiated to LPM think its methods and procedures are valuable only for showing unskilled and inexperienced performers how to follow the simple steps in simple, repetitive projects with similar tasks and outcomes.

Not so. Obviously, in simple projects LPM's scale should be kept simple, lest its application cost more in time and effort than it provides in benefits by assuring quality, consistency, and timeliness.

5 Law firm lawyers offended by the suggestion that overbilling is rampant, accepted, and even encouraged should consider a *New York Law Journal* article from March 26, 2013, that reported on a recent counterclaim by an energy industry client that DLA Piper had sued for payment of \$675,000 in unpaid legal bills. The counterclaim alleged a "sweeping practice of overbilling," and discovery disclosed some damning intra-firm e-mails. "I hear we are already \$200K over our estimate," wrote one firm lawyer. "That's team DLA Piper!" Another partner responded that a third colleague had now been brought in to work on the matter. "Now Vince has random people working full time on random search projects in standard 'churn that bill, Baby' mode. *That bill shall know no limits.*" [emphasis added]

LPM really comes into its own in planning and executing highly complicated projects, those involving many distinct moving parts and players. Its job is not to impart legal knowledge to the unknowledgeable; it is to impart *order* to the various activities of already knowledgeable performers.

A Few Words on LPM Technology

Please, don't get freaked out about technology. In the following pages, we will indeed discuss the role of emerging technology in supporting LPM and provide some screen shots that show what state-of-the-present-art technology looks like. And yes, a lot of tech-savvy IT experts, vendors, and practicing lawyers are making great strides in developing effective and user-friendly LPM tools and platforms.

However, because LPM is a common-sense approach to managing work that primarily involves how people communicate with other people to get projects done, it is not necessarily technology-dependent, nor does it require technological tools. The great pyramids—a pretty decent project management accomplishment—managed to get built without software support.

Smaller firms that don't have large IT budgets certainly can cultivate some or all LPM skills without state-of-the-art software support. For small or fast-breaking projects, LPM planning can be done on the backs of envelopes or can employ hand-drafted checklists and flow charts—anything that will impose order and manageability on project phases, tasks, and budgets.

That said, it is true that LPM can benefit greatly from a project team's collective access to technological support tools that aggregate, organize, and permit open access to all relevant forms of project information. These tools have come a long way in a short time.

The first-generation stand-alone tools developed between 2005 and 2008—often by internal law firm IT staffs—generally earned lawyers’ disdain as being overly complex, hard to learn, and too time consuming to use.

Newer efforts have produced tools that are far more user-friendly. Some come from external vendors, either as off-the-shelf offerings or as customized platforms keyed to firms’ legacy IT systems. Others are built internally, the products of effective collaboration among lawyers, internal financial staff, and IT experts.

However the technology is created, today’s best tools are

- easy to learn and use without extensive training;
- readily accessible in real time by all team members (including, with some firm-only information blocked, client-side stakeholders);
- capable of tying together in real time all relevant scoping, planning, communication, and monitoring information;
- capable of providing internal team members and clients with customized dashboards that allow easy review of task status, budget-to-actual, and changes to the original plan;
- linked to the firm’s existing time entry and financial reporting systems;
- good for tracking current activity and for accessing historical data.

Templates and Checklists

Templates, checklists, and other “job aids” have undergone a parallel evolution in LPM. In the past, these tools often were created by individuals for their own use or generated ad hoc for a particular transaction or piece of litigation. The result was that they were idiosyncratic and often not widely shared, even among members of the same team.

Because LPM encourages consistent activity and vocabulary, part of its maturation has included efforts by practice groups and client teams to break recurring projects into consistent phases and tasks and to embody collective and conventional wisdom into consistent templates and checklists.

Rather than reinventing the wheel for each engagement, practice groups can develop an ever-expanding and ever-improving set of tested and validated templates, checklists, or action steps. This can be time-consuming, but it only has to be done once for each type of deliverable. Savvy lawyers use these templates both for initial project scoping and for subsequent detailed project planning. This supports project continuity, and it also ties all legal activity back to the client's original objectives and priorities. These checklists can be keyed to specific project phase codes and task codes, allowing automated tracking. This will be discussed in more detail in Chapter 5.

Want to read more?

To order *Legal Project Management in One Hour for Lawyers* or get more information, visit the [ABA Webstore](#).