




2013 TAGLaw International Conference

Legal Project Management : A New Model for Enhancing Profitability & Competitive Edge

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1



Background

- LawVision history
- Work in project and practice management
 - 2000 + trained in LPM
 - Over one hundred firms assisted with change management for practice or project management
 - Chair of largest, most prestigious conference on this subject
- Approach to / philosophy about legal project management – not PM “lite”
 - Input of academic institutions and PMPs
- LPM - just a “fad” or the “new normal”?

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2

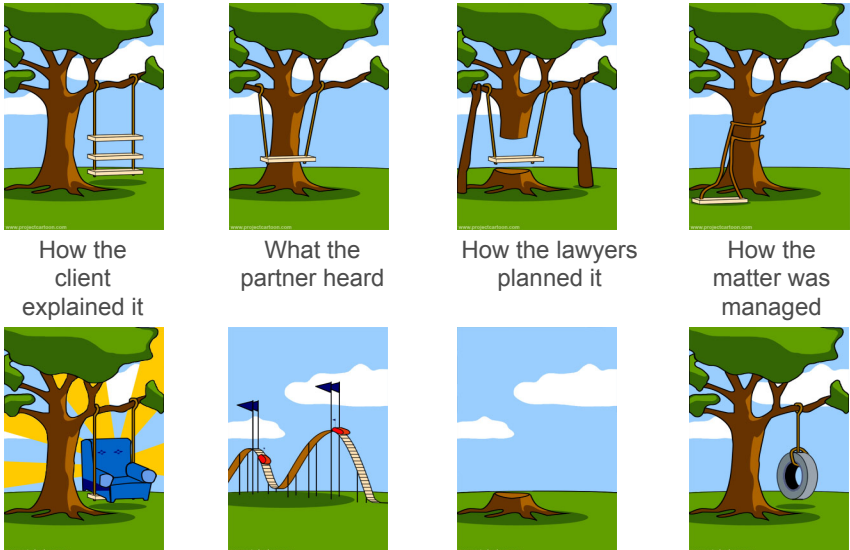



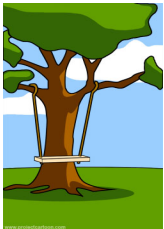

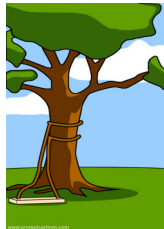

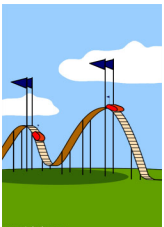
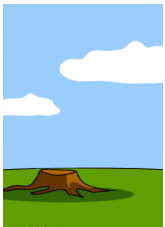

What is Legal Project Management?

- A process for defining, planning, executing and evaluating matters / projects
- A more proactive, disciplined approach to the management of legal matters which includes application of specific knowledge, skills, tools, and techniques to achieve project objectives
- Underlying principle: effective communication and setting and meeting of expectations

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How the client explained it	What the partner heard	How the lawyers planned it	How the matter was managed
			
How partner envisioned it	How it was billed	Lawyer & client communications	What the client really wanted

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Key Elements

- Upfront discussion of client's objectives / expectations
- Detailed "scoping" of the work – whether on an AFA or to align with project budget
- Breaking down the work into component parts to develop more accurate budgets
- Development of budgets and management of the matter to the budgets
- More active management of the matter throughout
 - Enhanced project team communication
 - Enhanced client communications
- Dealing with scope changes throughout a matter
- End of matter debriefing / lessons learned

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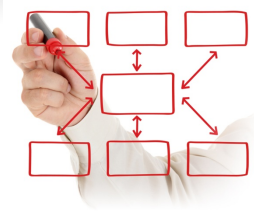
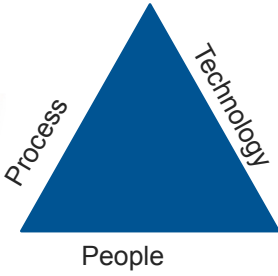

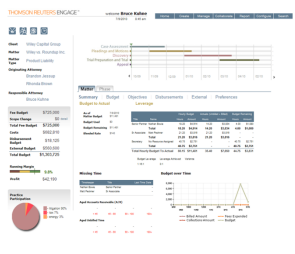
What is Legal Process Improvement?

- Legal process improvement is a methodology for refining legal processes to improve efficiency and effectiveness to the benefit of the firm and / or clients
 - An approach by which you identify, analyze, and improve existing processes within the organization to meet new goals and objectives
- Underlying principle: identifying waste to streamline processes and / or make them more consistent in quality

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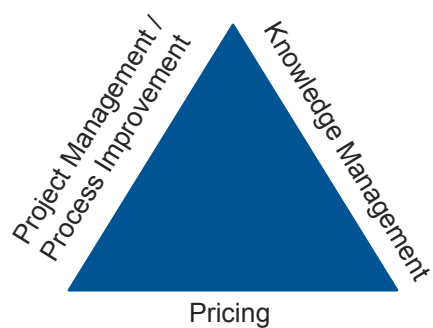
Project Management: Key Elements

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An Intersection of Disciplines



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Trends Driving Law Firms to Use Project Management Approaches

- Changing client demands and expectations
 - Segmentation / disaggregation of work
- Increasing competition for legal work
- Changing profit equation in law firms
- Project management use in almost every industry / company



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Trends Driving Law Firms To Use Project Management Approaches (cont.)

- Changing client demands and expectations – pressure to lower costs
 - Critical for their companies to compete
 - **Pressure on in-house counsel to reduce legal costs – just like in every other part of their business**
 - **Role of procurement and finance personnel**
 - **Expectation for increased efficiency without loss of quality**
 - Increased emphasis on non-hourly pricing (AFAs) and budgets
 - Clients trying to drive more predictability for their legal spend



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The Clients' Perspective

- *90% of General Counsel said they were under internal pressure from their Finance Directors or equivalent to provide better value, efficiency and cost reductions*
- Corporate legal budgets are flat or shrinking.
- Many industries experience a continual downward pressure on price of their products and now expect law firms to do the same.
- With demand for legal services essentially flat and an abundance of legal services providers, clients are driving law firms to change the way they do business and reduce costs.
- In one survey, 83% of general counsel indicated that the way legal services are provided has changed forever, not simply a temporary change during the recession.

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In-house Counsel, Global Power Company

“There is pressure on in-house legal departments to show that they: (1) add value (are not a cost center) and (2) can budget and control costs (like all the other parts of a business).

The day that outside counsel can say ‘it will cost what it will cost [based on how long the matter takes]’ is over.”

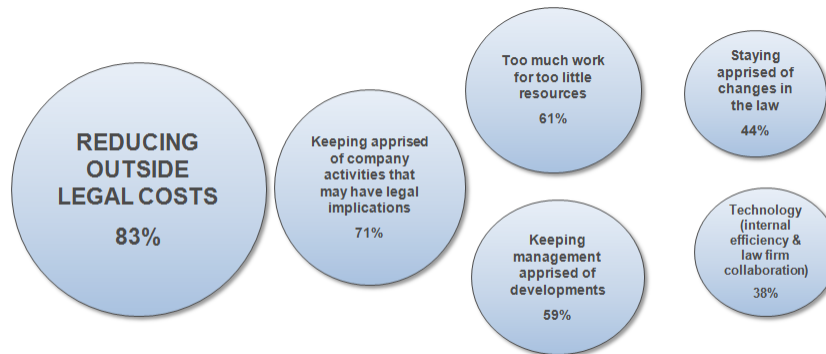
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In-House Stresses: What Keeps You Up at Night?

"Reducing Outside Legal Costs" is one of the most pressing issues facing legal departments.



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* ACC/Serengeti Managing Outside Counsel Survey (10th ed)

15

COMPARING RESULTS

Home > Reports

My Reports Matter Info Spending Budgeting Counsel

Matter Resolution Detail with No Grouping

Report Criteria

Report

Print Report... Export CSV...

Matter Name	Lead Co. Person	Lead Firm Lead OC	Duration Estimated	Fees & Exp % Budget	Paid % Estimate	Received % Estimate	Total Outlay Estimated
Totals: 3 matter(s)			1925	\$582,765	\$1,865,000	\$0	\$2,447,765
Averages:			1937	107%	101%	0%	\$2,395,500
Show details / Hide details			641	\$194,255	\$621,667	\$0	\$815,922
Covote v. Acme	Admin. Acme	Shriber Handy Lawyer Greg	644	\$77,812	\$830,000	\$0	\$907,812
Custer v. Acme	Casemanager Jeff	Harper & McCord Lawyer Robert	1053	\$351,219	\$660,000	\$0	\$1,011,219
Sprat v. Acme	Casemanager Don	Coleridge & Keats Lawyer Samuel	228	\$153,734	\$375,000	\$0	\$528,734
			237	133%	100%	--	\$490,500

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Comparing Results (Detail)

Matter Resolution Detail with No Grouping

Report Criteria

Report

Print Report...

Export CSV...

Matter Name ▲	Lead Co. Person	Lead Firm Lead OC	Duration Estimated	Fees & Exp % Budget	Paid % Estimate	Received % Estimate	Total Outlay Estimated
Totals: 3 matter(s)			1925	\$582,765	\$1,865,000	\$0	\$2,447,765
			1937	107%	101%	0%	\$2,395,500
Averages:			641	\$194,255	\$621,667	\$0	\$815,922
Show details / Hide details			645	107%	101%	0%	\$798,000
Coyote v. Acme	Admin. Acme	Shriber Handy Lawyer, Greg	644	\$77,812	\$830,000	\$0	\$907,812
			689	141%	104%	0%	\$855,000
Substantive Law: Liability - Products							
Matter Description: Premature explosion (due to defective short fuse) propelled plaintiff over cliff, and ended cartoon.							
Form of Resolution: Jury Trial							
Description of Resolution: Court awarded plaintiff \$830,000 in special and general damages.							
Timing of Resolution: Trial Decision (Estimated: Trial Decision)							
Date Resolved: 05/12/2006 (Estimated: 06/06/2006)							
Matter Complexity: Moderate							
Lessons Learned: Jurors in this jurisdiction seem to have an affinity for toons, and are inclined to punish corporations.							
Hours Billed by Firm: 214.2							
Blended Hourly Rate: \$243.56							
Number of Invoices: LEDES: 9 - Non-LEDES: 3							
Lead OC Evaluation: 3.5 - Good choice of outside counsel							
Custer v. Acme	Casemanager, Jeff	Harper & McCord Lawyer, Robert	1053	\$351,219	\$660,000	\$0	\$1,011,219
			1031	94%	98%	0%	\$1,050,000
Substantive Law: Liability - Products							
Matter Description: Dynamite exploded as worker was making final preparations due to defective short fuse. Significant injuries to hands.							
Form of Resolution: Jury Trial							
Description of Resolution: Court awarded plaintiff \$623,000 in actual and special damages.							
Timing of Resolution: Trial Decision (Estimated: Trial Decision)							
Date Resolved: 06/23/2006 (Estimated: 06/01/2006)							
Matter Complexity: Moderate							
Lessons Learned: Judge's sympathy elicited during Christmas season--seek continuances of such trials until after years end.							
Hours Billed by Firm: 175.4							
Blended Hourly Rate: \$266.93							
Number of Invoices: LEDES: 8 - Non-LEDES: 4							
Lead OC Evaluation: 3.0 - Not bad outcome for this lawyer/firm.							

17

17

CEO, Technology Company

We don't have patience anymore for law firms that act like their old ways of doing business are sufficient today. We would be out of business if we still operated the same way as 2 years ago, much less 10 or 20 years like many law firms. There are so many good lawyers and firms to choose from – why would we choose a less efficient or progressive one?

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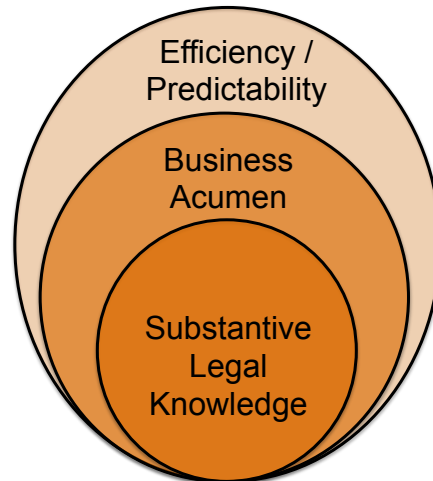
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What Do Clients Want?

“Old Normal”



“New Normal”



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19

Examples – What Are Clients Really Doing?

- Pushing law firms to provide more for less \$\$ because they are being measured by how much they can bring down costs of outside counsel
- Expecting law firms to assume more of the risks – after all they hired you for your expertise in similar matters
- Expecting law firms to create economies of scale or efficiencies through handling of similar matters – understanding that while some matters may be “first impression”, most matters have many replicable pieces that can be quantified and better managed
- Expecting firms to pitch them using substance (case strategy and process), not simply marketing like bios and websites (that is the entry point)

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20

20



Language from a RFP from Major Financial Institution

- Indicate the number of dedicated legal project managers employed by your firm.
- Indicate the number of dedicated legal project managers that your firm will commit to providing on our matters.
- Describe the key tasks performed by your firm's legal project managers.
- What were the quantifiable benefits achieved by utilizing legal project managers on these matters?

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Language from a RFP from Major Corporation

“If the Responsible Attorney and appropriate Practice Group Head have determined that a project manager shall be utilized on a matter, only a project manager certified as a PMP from the Project Management Institute or other reputable certifying body, as determined by Legal & Compliance, may serve in such capacity. Project managers may bill on an alternative fee basis or an hourly rate basis, subject to any volume discount agreements then in effect with [Name of Organization] and Outside Counsel, if Outside Counsel is a Sourced Law Firm. Approved project management tasks shall be billed to the appropriate ABA Code series L600.”

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22



In-house Counsel, Global Pharmaceutical Company

“Law firms have always insisted that if you cut costs, you cut quality. But, if they invested in knowledge management and better technology and training, and their partners adapted, we believe they could increase their quality and cut costs. Maybe every firm can't be that innovative or progressive but if a few are, the rest will have to wake up.”

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23 23



Trends Driving Law Firms To Use Project Management Approaches (cont.)

- Increasing Competition for Legal Work
 - Increasing use of non-law firm suppliers (outsourcing)
 - **Aggressive price competition from law firms at all levels of the market**
 - Some leading law firms pushing clients and competitors toward LPM
 - RFPs asking project management and process improvement or other efficiency initiatives
 - Increased need for real differentiation in a flat market
 - Opportunity for competitive advantage – short- or long-term?
 - Grading of law firms by clients



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24




Trends Driving Law Firms To Use Project Management Approaches (cont.)

- Changing profit equation in law firms
 - Lower demand for traditional legal services
 - Inability to rely on rate increases to maintain profitability
 - Loss of the “mid-sized firm” advantage
 - Need for greater productivity from firm resources to maintain or enhance profitability
 - Shift in clients’ perceived value of legal work
 - Recognition that the firm must be managed at the practice group and matter level to be profitable long-term

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It Can Happen to You... An Illustration

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Matters Evaluated at One Firm

- Analysis of matters in 2009-2011 with poor financial results.
- Primarily hourly billed matters, not AFA's.
- Matters not industry specific.
- Warning signs / red flags happen throughout the matter.

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27




Warning Signs – Prior to Being Hired

- Client fired prior attorneys or is suing prior attorneys
- Client did not pay prior attorney invoices
- Client informs firm that they expect to pay them out of the successful results of the case
- Key client personnel have little experience working with outside counsel.

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Warning Signs – Fees and Budgets

- Client demands significant hourly discounted rates (20 -30%) but also demands seasoned attorneys be assigned
- Client does not request up front budget and no price expectations set with client.
- Internal estimate exceeds the amount the lawyers believe client will accept and so do not communicate
- Budget is prepared but is not used to manage actual time incurred on the matter.

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Warning Signs – Communications

- Lack of internal communications
- Lead firm partner is unclear who the ultimate buyer / decision maker is in the client organization
- Limited communications with client at the outset of the matter (do not understand client objectives)

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Warning Signs – Payment

- Monthly bills are held – reluctance to communicate bad news
- Client goes several months without making any payment
- Client makes monthly payments that are significantly less than the monthly bills
- Client informs firm they cannot pay the invoices but they are in the process of obtaining financing

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What did these cases cost this firm?

- During 2008 – July 2011 – 28 matters with pre-bill write downs (not discounts) and / or invoice write offs exceeding \$300,000 individually and amounted to \$16 million in total.
- Average write down / off = \$571,000 per case
- \$16 million in lost revenue potential

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Discussion

What matter and client management disciplines and tools could be employed to help prevent the poor financial outcomes and client relationship disasters in matters like these?

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Common Reasons for Write-offs / downs – Often Insufficient Project Management

- Communication
 - Lack of communication at outset of matter to clarify expectations
 - Assumptions not defined for scope of work
 - Lack of communication among project team to ensure no unnecessary work done
- Scope Changes
 - Lawyer does not discuss scope changes and impact on budget when they occur
 - Client assumed work was in the original budget because scope not clearly defined
- Budget is prepared but is not used to manage actual time incurred on the matter / not seen as a “cap” the way the client viewed it

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Benefits of Legal Project Management


<u>Benefits to Firm / Team</u>	<u>Benefits to Client</u>
<ul style="list-style-type: none"> Improved profitability of matters Greater client satisfaction Increased revenues from clients Enhanced risk management Greater differentiation from competitors Greater consistency across offices 	<ul style="list-style-type: none"> Greater predictability Improved communication / "no surprises" A more managed approach to legal work On budget / on time Greater efficiencies Enhanced quality of the work / greater consistency



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Bottom Line

- Clients want decreased legal spend and / or predictability
- Law firms want to maintain or increase profit margins in the new marketplace
- Matters need to be managed more actively to achieve both.



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Table Discussion

What trends do you see driving legal project management in your area of practice?

How can LPM help your firm provide value to clients?

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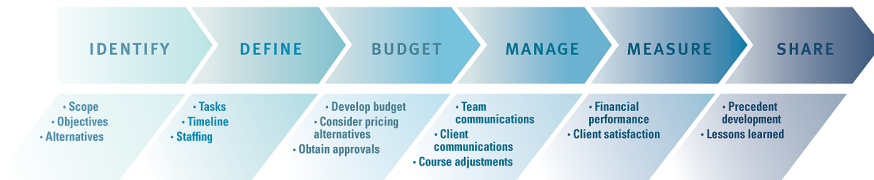


Using LPM Approaches

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An Example Several Firms Are Using Based on Project Management Institute (PMI) –
PROJECT MANAGEMENT: Discipline involved in delivering a task or assignment on budget, on time and at the desired level of quality



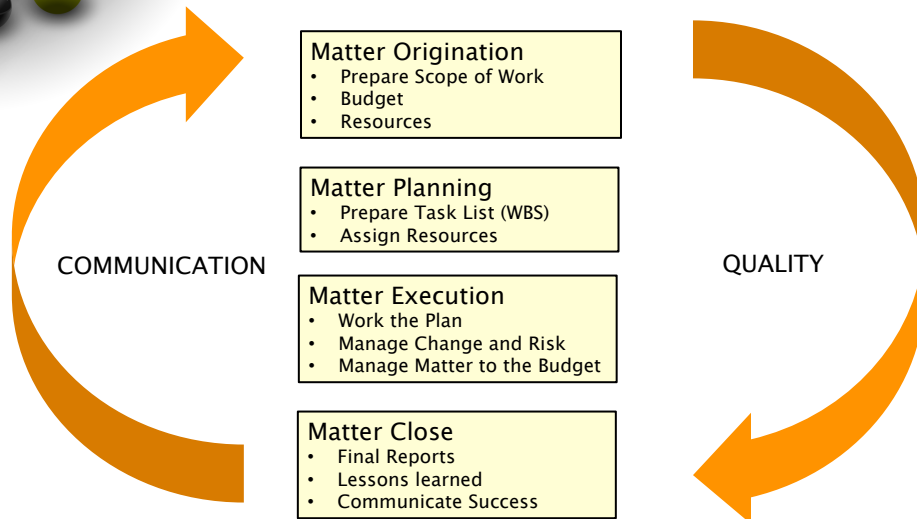
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Project Management Framework



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- ## How Do You Implement These Key Elements?
- Upfront discussion of client's objectives / expectations
 - Detailed "scoping" of the work – whether on an AFA or to align with project budget
 - Breaking down the work into component parts to develop more accurate budgets
 - Development of budgets and management of the matter to the budgets
 - More active management of the matter throughout
 - Enhanced project team communication
 - Enhanced client communications
 - Dealing with scope changes throughout a matter
 - End of matter debriefing / lessons learned
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Metrics

Steps to success

Overview

	Actual	Target	Variance
▲ Lit Scope	0000000	0000000	0000000
▼ N-Lit Scope	0000000	0000000	0000000
● Lit N-Scope	0000000	0000000	0000000
● N-Lit N-Scope	0000000	0000000	0000000

Exposure Top 10 Matters

Forecast value	Title	Jurisdiction	Prob of success	% of Work Complete
\$999,999	Jones	Italy	60%	45%
\$876,543	Smith	Germany	70%	80%
\$675,452		Germany	30%	90%



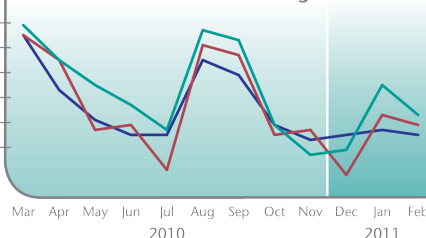
\$ Exposure



\$ Legal spend vs budget

Monthly legal spend

Rolling 12+ Accruals



— Costs approved
— GRAS estimates phasing
— Legal department budget

43

BAKER DONELSON
BEARMAN, CALDWELL & BERKOWITZ, PC

Develop a Project Plan – Identify Stakeholders

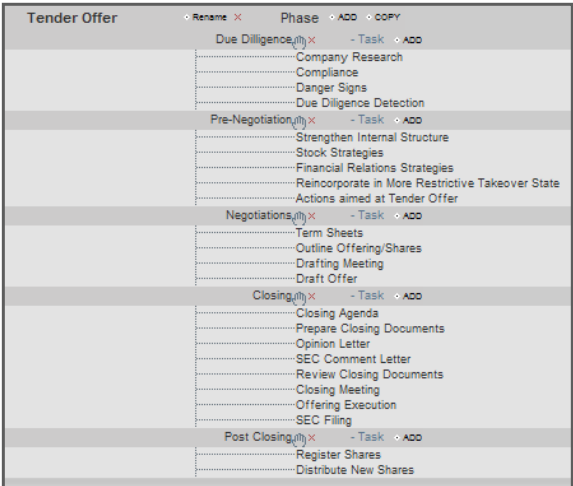
BakerManage captures and makes this information available to inside and outside counsel through the SharePoint collaboration site.

- The Stakeholder list serves as a contact list and a clarification of roles
- Evaluation of all Stakeholders presents opportunities to identify potential cost savings through shared responsibilities or vendors

Name	Position	Contact Information	Contact Type	Expertise	Responsibility	CC on all Correspondence	Project Role/Authority
Jerry Oakes	LPM - TSM	601-979-3630	BORCB		No		
Stuart David	Shareholder	Extension: 2488 sdavid@bakerdonelson.com Office: 601.381.2889 Fax: 601.381.2488	BORCB		No		
Smith, Alan	Shareholder	Extension: 2022 asmith@bakerdonelson.com Office: 601.381.2822 Fax: 601.374.8932	BORCB		No		
ONE John	Client	Shopping Center, LLC Office: 601-777-4114 Cell: 601-509-3920 johnd@shoppingcenterllc.com	Client	Designated as representative for TIC issues by SO management letter	No		
Sample	Miscellaneous (Vendors, etc.)		Miscellaneous (Vendors, etc.)		No		

44

M&A: Tender Offer – Beginning of a Work Breakdown Structure



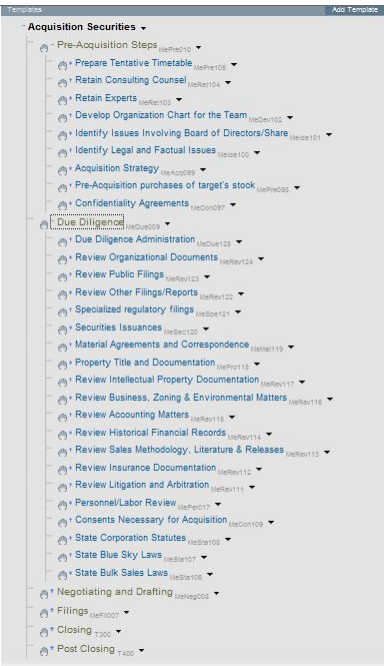
The screenshot displays the 'Tender Offer' phase in the LawVision software. The interface is organized into a hierarchical tree structure with phases and tasks. The phases shown are:

- Due Diligence**
 - Company Research
 - Compliance
 - Danger Signs
 - Due Diligence Detection
- Pre-Negotiation**
 - Strengthen Internal Structure
 - Stock Strategies
 - Financial Relations Strategies
 - Reincorporate in More Restrictive Takeover State
 - Actions aimed at Tender Offer
- Negotiations**
 - Term Sheets
 - Outline Offering/Shares
 - Drafting Meeting
 - Draft Offer
- Closing**
 - Closing Agenda
 - Prepare Closing Documents
 - Opinion Letter
 - SEC Comment Letter
 - Review Closing Documents
 - Closing Meeting
 - Offering Execution
 - SEC Filing
- Post Closing**
 - Register Shares
 - Distribute New Shares

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M&A: Tender Offer – Beginning of a Work Breakdown Structure




The screenshot displays the 'Acquisition Securities' phase in the LawVision software. The interface is organized into a hierarchical tree structure with phases and tasks. The phases shown are:

- Pre-Acquisition Steps**
 - Prepare Tentative Timetable
 - Retain Consulting Counsel
 - Retain Experts
 - Develop Organization Chart for the Team
 - Identify Issues Involving Board of Directors/Share
 - Identify Legal and Factual Issues
 - Acquisition Strategy
 - Pre-Acquisition purchases of target's stock
 - Confidentiality Agreements
- Due Diligence**
 - Due Diligence Administration
 - Review Organizational Documents
 - Review Public Filings
 - Review Other Filings/Reports
 - Specialized regulatory filings
 - Securities Issuances
 - Material Agreements and Correspondence
 - Property Title and Documentation
 - Review Intellectual Property Documentation
 - Review Business, Zoning & Environmental Matters
 - Review Accounting Matters
 - Review Historical Financial Records
 - Review Sales Methodology, Literature & Releases
 - Review Insurance Documentation
 - Review Litigation and Arbitration
 - Personnel/Labor Review
 - Consents Necessary for Acquisition
 - State Corporation Statutes
 - State Blue Sky Laws
 - State Bulk Sales Laws
 - Negotiating and Drafting
 - Filings
 - Closing
 - Post Closing

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M&A: Tender Offer –

Beginning of a Work Breakdown Structure to Task Level


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Acquisition Securities

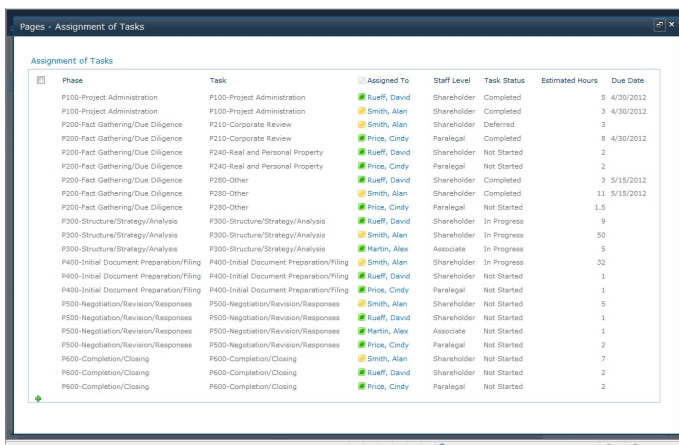
- Pre-Acquisition Steps
 - + Prepare Tentative Timetable
 - + Retain Consulting Counsel
 - Retain antitrust counsel
 - Retain environmental counsel
 - Retain intellectual property counsel
 - Retain labor and employment counsel
 - Retain real estate counsel
 - Retain securities counsel
 - Retain tax counsel
 - + Retain Experts
 - + Develop Organization Chart for the Team
 - + Identify Issues Involving Board of Directors/Share
 - + Identify Legal and Factual Issues
 - + Acquisition Strategy
 - + Pre-Acquisition purchases of target's stock
 - + Confidentiality Agreements
- + Due Diligence
- + Negotiating and Drafting
- + Filings
- + Closing
- + Post Closing

47



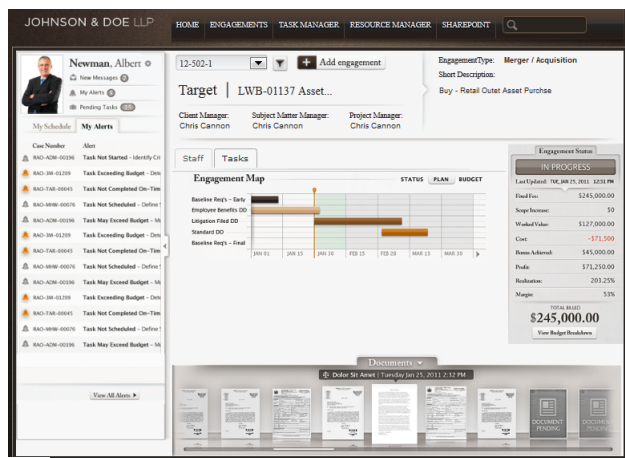
Develop a Project Plan – Assignments and Schedule

BakerManage provides a simple assignment tracking tool to monitor completion of work. This includes the ability to monitor task status, due dates and recommended hours for completion.



48

Engagement Manager Dashboard



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Communications Plan

Stakeholder Role	Communication Deliverable	Frequency / Deadline	Method	Resp.	Receipt Response
GC & In-House Attorneys	Status Report	Weekly & as needed	<ul style="list-style-type: none"> Conference call once a week Email 	Partner	Interactive
Firm Attorneys	Meetings	Weekly & as needed	Conference call / meeting	Sr. Assoc.	Interactive
CFO & In-house lawyers VP of Bus. Development	Status Report	Weekly	Conf. Call	Sr. Assoc.	Interactive
Board of Wiley Capital	Status Report	As needed	Face to face meeting	G.C.	As needed
Regulator SEC	APP	As needed	Mail-	Sr. Assoc.	Approval
Blackner CFO	Update Budget	Monthly	Email	Partner	Approval

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50

What Does Implementing LPM Require?

- Development of tools for budgeting, management of matters and monitoring
- Firm management support from the outset for firm-wide initiatives or pilots driven from firm level or more grass roots
- Training lawyers and other professionals and staff in LPM approaches
- Behavioral shifts by lawyers and professionals
- Alignment of compensation incentives for profitable management of work
- Development of templates for different types of matters – reusable assets for similar matters
- Integration of the matter management with practice group management, financial analysis and lawyer development

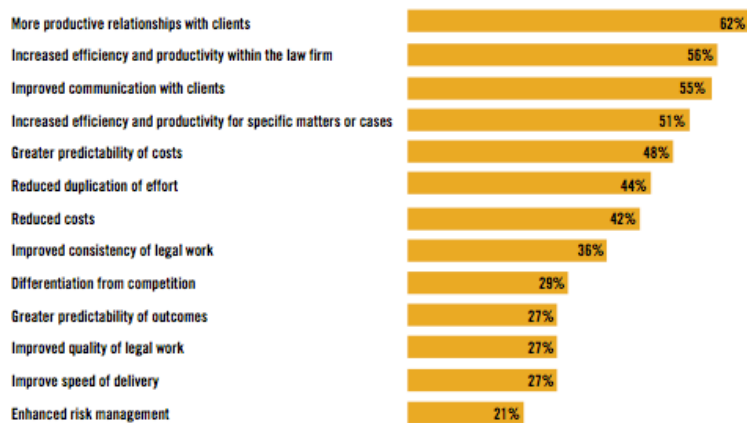
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Which of the following benefits has your firm realized from its project management efforts? Check all that apply.



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Source: Legal Project Management, Much Promise, Many Hurdles, Aug 2012, ALM

52



Using LPM For Competitive Advantage

- Time spent developing budget, scoping and project plan – expectation simply to win work
- “Service Delivery” as a method of differentiation
 - Process for more efficiently handling the work
 - Better understanding of client objectives and expectations
 - Delivery of work on time and on budget
 - Transparency to client of project course and outcomes
- Better budgeting and management of the work and project team
= reduced write-offs / downs and greater profitability

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53



What's Different from A Year Ago?

- Continued lower demand for legal services has law firms increasingly aggressive in competing for work
- Law firms have tapped most of the easy areas of cost reduction / revenue enhancement – without major changes to their business model.
- Clients are increasingly asking about project management when hiring law firms
- Law firms that are implementing project management or other alternative delivery of services are winning business from law firms that are not
- Larger firms have been adopting changes more quickly than mid-sized firms and are competing on price with smaller firms

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54

Integration: Like a Puzzle, All the Pieces Must Fit Together to Make Project Management Work

Positioning and Marketing

Management Commitment/Alignment

Partner Buy-in and Accountability

Training, support and implementation

Tools and Resources – Budgeting, Project Planning and KM, Project Managers

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55

Leading Firms Implementing LPM

Firm	Buy-in	Management Commitment/Alignment	Training/Implement	Tools	Positioning/Marketing
A	●	●	●	●	●
B	●	●	●	●	●
C	●	●	●	●	○
D	●	●	●	●	○
E	●	●	○	●	○
F	●	●	●	●	●
G	●	●	●	●	●

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56




Thank you!

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57




Examples of LPM Techniques

- Instead of just using Excel spreadsheets and yellow pads to make lists and map out costs, using tools for budgeting and project planning to:
 - Capture budgets created and manage to the budget (not just create it and put it in a file)
 - Re-use budgets for similar matters instead of starting from scratch
 - Know the costs of a “typical” deposition, expert witness preparation, draft of MSJ, etc.
 - Manage the cost and the profitability of the matter throughout the engagement – not just evaluate it at the end
 - Provide clients 24 / 7 access to the budget and status of the matter
- Instead of hunting around the firm for prior work product, having it imbedded into the intranet / extranet site for a matter / client / project type
 - Where all members of a project team or practice group can access (unless password protected)

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58




Examples of LPM Techniques (cont.)

- Doing process “maps” of all the steps in a matter so that everyone on the team knows where matter stands, what their role is, what is next, etc.
 - Enables firms to cut steps or change staffing quickly to meet client’s efficiency expectations or to manage to a fixed fee or cap
 - Helps ensure project team is on same page and reduces likelihood of redundancy, wasted work and miscommunication
 - Provides a way to educate clients about where a matter’s costs arise, what can affect meeting the client’s objectives, why changes in scope, schedule or timing affect budget or other results, etc.
 - Helps firms compete for work by showing their efficiencies

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Examples of LPM Techniques (cont.)

- Meeting with the client at the onset of a matter to present the project plan.
- Using extranets and similar tools that clients may consult for project status and information.
- Planning for regular updates with the project team, with the client and with both the project team and the client.
- Advising clients about issues or delays as they arise to permit client participation in course corrections.

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60



PLI Survey Results: 2011 - 2012

- 55% (47%) of firms responding have a budgeting tool that compares budget to actual throughout a matter and 20% (9%) are developing one.
- 31% of respondents use project management software to manage projects (other than budgeting and financial software) – 2011.
- Approximately 30% of respondents require task codes for all matters and 35% for matters in certain practices (2011).
- 48% are requiring more detailed Engagement Agreements than in the past and, in more than 60%, they include a scope statement (2011).
- 45% require a budget for all major matters (2011).

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Litigation – Beginning of a Work Breakdown Structure



Template Name: ADD

Litigation

- Case Assessment
 - Fact Investigation/Development
 - Analysis/Strategy
 - Experts/Consultants
 - Document/File Management
 - Budgeting
 - Settlement/Non Binding ADR
 - Other Case Assessment, Development and Admin.
- Pleadings and Motions
 - Pleadings
 - Preliminary Injunction/Provisional Remedies
 - Court Mandated Conferences
 - Dispositive Motions
 - Class Action Certification and Notice
- Discovery
 - Written Discovery
 - Document Production
 - Depositions
 - Expert Discovery
 - Discovery Motions
 - Other Discovery
- Pre Trial and Trial
 - Fact Witnesses
 - Expert Witnesses
 - Written Motions and Submissions
 - Other Trial Preparation and Support
 - Trial and Hearing Attendance
 - Post-Trial Motions and Submissions
 - Enforcement
- Appeal
 - Appellate Briefs
 - Appellate Motions and Submissions
 - Oral Argument

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Litigation – Beginning of a Work Breakdown Structure

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63

Litigation – Beginning of a Work Breakdown Structure to Task Level

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64




Firm A – AmLaw 100 Firm

- Training of all lawyers in some basic PM and PI concepts
- In-depth training of a large group of selected legal professionals in PM and PI skills
- Buy in from a significant number of partners but still probably 25% not using in any meaningful way
- Basic tools for budgeting but sophisticated approaches to process mapping
- Strong links with knowledge management
- Some alignment with compensation incentives
- Strong market position as a leader in this area

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Firm D – AmLaw 100 Firm (focused practice)

- Piloting of PM in several practice groups
- In-depth training of almost all partners and all senior associates in PM skills
- Very good tools for budgeting
- Terrific knowledge management support for leading edge model documents
- Beginning alignment with compensation incentives
- A little publicity in this area

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Firm G – Global Firm

- Piloting of PM in several practice groups
- In-depth training of new income partners in PM skills
- Beginning to get real buy in with the firm task force driving it, the pilot projects over past two years and a recent partner retreat with messages from firm chair and clients
- Very basic tools for budgeting
- Developing links with knowledge management
- Beginning alignment with compensation incentives
- Beginning to get publicity as a leader in this area

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67



A Mid-sized Firm

- Piloting of PM in several practice groups
- Very sophisticated tools for workflow and project management / advanced tools for budgeting
- Beginning to get real buy in with the roll out of the tools – increasing percentage of matters using the tools
- Process mapping in selected practice areas
- Developing links with knowledge management
- Beginning alignment with compensation incentives
- Beginning to get publicity as a leader in this area

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68



Concerns / Challenges in Implementing Project Management in Law Firms

- Natural cynicism of lawyers
- Time spent on project management – who will pay for it? Who will do it?
- Making legal work too mechanical or rote
- Getting lawyers to work in teams
- Getting buy-in from people in the firm, especially senior partners
- Lawyer discomfort with client communication
- Perceptions of compensation incentives
 - Keeping billable hours high vs. increasing efficiencies
 - Individual production vs. matter profitability
- Investing in new approaches – training, project managers, systems, etc.

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69