Legal Project Management: Leveraging Your Resources

ACC NCR Summer Series

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What Sets Us Apart: Service & Innovation

Legal Project Management (LPM)

- Greater predictability and transparency with matters
- Efficiency and cost management
- Fewer write-downs and write-offs
- Software to develop work and staffing plans, as well as budget and budget tracking/reporting
- Full-time Chief Practice Innovation Officer guides implementation of LPM in client matters; partners with clients to foster LPM procedures in their organizations

Process Efficiency

- Tools and metrics to effect continual process improvement
- Examples include hardware and software standards, data security, eBinders and eBriefs, e-discovery and a robust extranet
- Myriad support systems and technology options shared with clients to enhance our work on their behalf
- Efficiencies derived through use of LPM

SmartPaTH®

A Smarter Way to Work – predictable, efficient and aligned with client goals

Legal Project Management | Process Efficiency

Value-Based Pricing | Flexible Staffing

Value-Based Pricing

- Pricing arrangements tailored to client needs
- Growing central repository of alternative fee arrangements to use as a guide
- Firmwide uniform task codes provide a central repository for financial analyses and budget modeling
- Software to develop work and staffing plans, as well as budget and budget tracking/reporting
- Full-time pricing manager helps model value-based pricing options and tracks performance against budget

Flexible Staffing

- Staff efficiently, optimizing costs while maintaining targeted results
- Balance options including associate/partner staffing, contract lawyers, use of nonlawyers and outsourcing capabilities via legal staffing providers
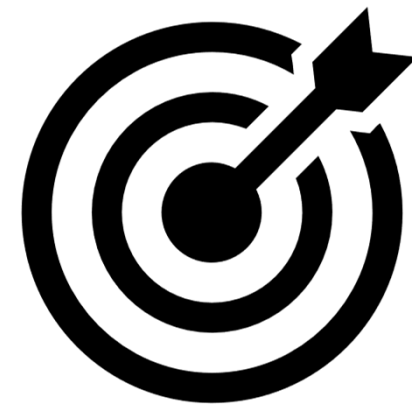
THOMPSON HINE

A Smarter Way to Work

MANAGING PROJECTS

Legal Project Management Objectives

- Manage Expense

- Improve Predictability of Cost

- Improve Outcomes

- Improve Perception of Value of In-House Law Department

LPM & Thinking Strategically

Find the ROI in every deal, project or task by answering a few simple questions

- What does it accomplish (i.e., why are you doing it)?

- Does it make money for the company?

- Does it save money or resources? How much?

- How much personnel time will it require?

- Does it create an important connection that benefits the company?

- What will it cost?

Legal Project Management in Smaller, Entrepreneurial Company

- "Process" viewed as bureaucracy; pick battles

- Focus on pain points/areas of confusion:

  - Who is decision-maker?

  - Big picture legal cost

  - Role of lawyer (often not consensus)

 - "Risk" analysis - broad term

  - Example – acquisitions

Legal Project Management in Large, Highly Matrixed Organization

- Law Departments' role is to help the business achieve strategic objectives while minimizing legal risk and complying with legal obligations

- Legal must offer consistent and reliable support through the use of effective LPM solutions

- Focus upon high value, high profile legal activities / elimination or redirection of low value activities (e.g., contract thresholds)

- Review of processes to eliminate inefficient steps and to confirm the use of proper resources

- Use of technology to automate processes and control costs (e.g., LexisNexis® CounselLink e-Billing and Matter Management)

80-20 Rule for LPM

- Communication Protocol

- Project Description

- Project Risk Analysis

- Scope Change Procedures

- After Action Review
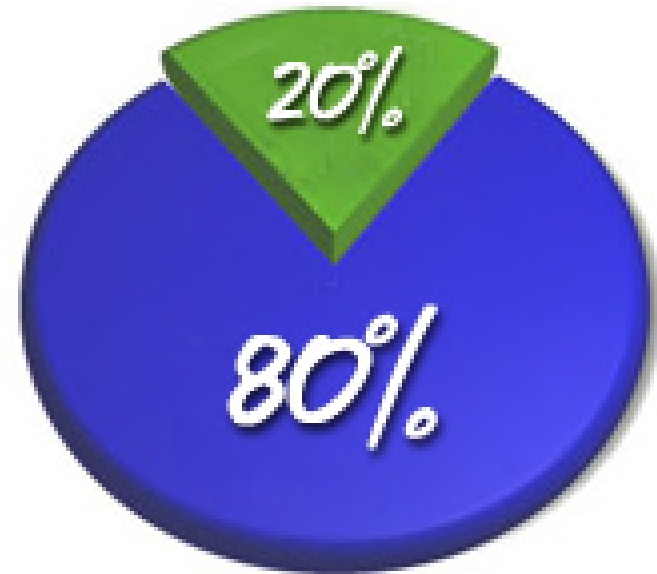
Communication Protocol

- Written strategy for getting the right information to the right people at the right time

  - Who needs information? What information do they need? When & how will they get it?

  - Who must convey the information? Who must respond to the information?

- Avoids misaligned expectations & information deficit

- Governance

  - Incorporate into budget, work plan & case calendar

  - Assign responsibility

Project Description

- Written summary
- Crucial threshold issues
  - In-Scope v. Out-of-Scope
  - Assumptions
  - Risks
  - Deliverables
  - Deadlines
  - Responsibility Matrix
- Clarifies expectations
- Shared vision of success
- Confirmation of purpose

Project Risks Analysis

- What can go wrong?

- What are the chances of it happening? (S, M, L, XL, XXL)

- How serious would it be if it did happened? (S, M, L, XL, XXL)

- What is the impact if it happens?

- What should be done about this risk?

- What is the trigger for implementing the contingency plan?

Scope Change Procedures

- Written request or confirmation of request

- Procedure for analysis of impact on budget and schedule

- Consensus on who can authorize change

- Update project plan for authorized changes

- Communicate change to project team

    – communicate decision not to change to requester

After Action Reviews

- Conclude each engagement with a review

- Discuss what worked well, what did not, what would you do differently, and include appropriate individuals

- Consider beginning from the end

CONDUCTING EFFECTIVE MEETINGS

Pre-Meeting

- Is it necessary at all?

  - "because it is Wednesday" is a silly reason to have a meeting

  - is group input needed?

  - is periodic interaction of the group needed?

- Will the right people be in the room?

- Is there a clear agenda?

- Is discussion pre-mature?

  - have action items from prior meeting been accomplished?

- Persuasive invitations & agenda

Conduct

- Prompt start, every time

  – no reward for tardiness – no catch-up or re-starts

- Watch the clock

  – use leader's privilege to shut down discussion

  – parking lot

  – Cuban Missile Crisis ExComm rules

- Close each agenda item

  – next steps; responsible party; deadline

- Summary of decisions and next steps

- End promptly

Post Meeting

- Distribute notes promptly
  - Highlight decisions made and next steps
  - not a transcript
- Monitor action items & send follow-up

For Further Information

On-Line Resources

- https://www.acc.com/services-initiatives/legal-operations/resources

- https://www.thompsonhine.com/innovation

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