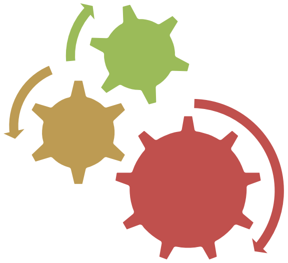
Project Management Training
for under $500



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What is project management?

PMBOK defines project management as the application of **knowledge, skills, tools**, and **techniques** to project activities in order to **meet or exceed** stakeholders' needs and expectations from a project.

In the context of law firms, project management is the methodical approach to client service and delivery. It is the discipline of carefully planning, organizing, and managing resources (people, documents, IT) to meet clients' goals or objectives, such as a client's legal problem. Project management is executed by a team of people who are led by a project manager, and who serve defined project team roles. The team uses knowledge, skills, tools, and techniques to analyze problems and decisions, complete tasks, monitor cost, time, and other constraints, manage quality, and bolster open communication among everyone involved.

It's about efficiency. It's about… **communication.**

Why now?

Your business case – trends driving legal project management:

- Increasing competition for legal work.
- Aggressive price competition.
- Increasing use of discounts and alternative fee arrangements.
- Need for greater productivity.
- Requests For Proposals (RFPs).
- Project management is used in almost every industry – this is not new to our clients.

Benefits of project management:

- Improves communication with the team and client.
- Helps predict and control cost.
- Helps monitor time spent on work.
- Emphasizes only work necessary to meeting objectives.
- Captures and leverages best practices / process improvement.
- Allows lawyers and firms to distinguish themselves.

Sources

Atwood, Christee. (2008). Manager Skills Training. Alexandria, VA: ASTD Press.

Boake, B., and Kathuria, R. (2011). Project Management for Lawyers. Peoria, IL: ARK Group.

Demystifying Project Management (August 18, 2011). Practising Law Institute Live Webcast.

DiMickele, S. M., Lambreth, S. R. (2011). PLI Project Management for Lawyers. New York: Practicing Law Institute.

Hassett, Jim. (2010). Legal Project Management Quick Reference Guide. Boston: LegalBizDev.

Legal Project Management Training. (March 2011). New York: The Hildebrandt Institute.

LPM Update: Lessons Learned in Implementing Legal Project Management. (March 15, 2011). ALI-ABA/NALP Live Webcast.

Richardson, D. (2011). Elephant? What Elephant? www.altmanweil.com.

Shackelford, Bill. (2004). Project Management Training. Alexandria, VA: ASTD Press.

Phase 5: Closing

Sample Checklist Items:

☐ Send a handwritten note to the client thanking them for the opportunity to work together. (Relationship Partner or Project Manager)

☐ Obtain final payment from the client.

☐ Carefully review the actual bills to the budget, and make note of large variances. Are they specific to any phase or deliverable? Are they specific to any particular person?

☐ Collect reusable client research, deliverables, and other materials from the team members and archive them in an easy-to-find folder in the document management system.

☐ Send the closed physical files to the central files room.

☐ Close the matter in the accounting system.

☐ Celebrate successes. Recognize outstanding contributions by your team members.

☐

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Finding the Right People.

People to interview

☐ 15+/- lawyers who have a reputation for being highly effective
- good team builders
- highly organized
- efficient
- bills processed and paid quickly
- use Alternative Fee Arrangements (AFAs)
- keep an eye/ear for possible co-teachers

☐ 2-3 general counsel / lawyers who are former general counsel
- gather feedback on project management from client's perspective (what liked / didn't like)
- keep an eye/ear for possible co-teachers

☐ Accounting department
- understand accounting system
- know what resources exist, ex.) billing alerts

☐ Finance department / billing and screening committee
- collect menu of approved AFAs
- gather history of AFAs, stories, good & bad
- obtain sample engagement letters

☐ Practice technologies / IT department
- use of e-rooms, shared workspaces, team calendars
- shortcuts of the document management system

☐ NALP/PDC colleagues – information on what other law firms are doing

Also compile training materials from other sessions

☐ Pricing ☐ Time Management and Organization

☐ Effective Meetings ☐ Billing and Timekeeping

☐ How to Delegate ☐ Giving Constructive Feedback

Using the Right Tools.

A Common Sense, Low-Tech Approach

☐ An approved AFA menu to use as an incentive for taking project management training (want to use AFAs, must be 'certified').

AFA Term	Definition/Matter Types	Pros/Cons

☐ Checklist items for each project phase.

☐ Sample project documents (budgets, AFA engagement letters, etc.)

☐ Talking points for 'harder' conversations.

☐ Upload a catalog of samples on the firm intranet.

☐ Quick reference card.

☐

☐

☐

Two key books:

Legal Project Management Quick Reference Guide
By Jim Hassett (2010). Boston: LegalBizDev.

Project Management Training
By Bill Shackelford (2004). Alexandria, VA: ASTD Press.

MEMO

Lessons Learned for
[project name and date]
[client/matter number]

Project Information

Include a paragraph or bullets that give general information about the project, including a high-level scope statement, resources used, and final budget. Identify the client, firm project manager, and key stakeholders, and list key deliverables.

Executive Summary

Summarize key lessons learned and highlight the main factors that influenced the project's successes and failures.

Supporting Project Documentation

Reference any supporting project documentation (status reports, schedules, budgets, feedback from stakeholders, etc.) that would give context to the Lessons Learned. Include document numbers.

Recommended Improvements

If new best practices or process improvements were discovered, make specific, actionable recommendations here. Describe the proposed process improvements in enough detail to ensure clear understanding; also identify expected benefits.

Topic: *(i.e., Project Management)*

Sub-topic (if applicable): *(i.e., Communication Plan)*

1. Lesson Learned: *Include a short factual statement of the Lesson Learned. Each category/subcategory may include one Lesson Learned or more.*
2. Analysis: *Describe root causes or other key factors that led to learning the lesson.*
3. Recommendation: *Make an actionable recommendation based on this Lesson Learned—i.e., describe what you would do differently.*
4. Impact: *Briefly describe the expected impact of implementing the recommendation. For example describe how it would change the project in terms of Time, Resources and Scope.*

Phase 4: Lessons Learned

An important objective (and benefit) of project management is process improvement. In Phase 4, Lessons Learned, the team should take a critical look at the project and discuss and capture what the team did really well (so a future team can repeat), and what the team didn't do so well (so a future team can avoid or change.)

Sample Checklist Items:

☐ Call the client to solicit feedback. (Relationship Partner or Project Manager)

☐ Schedule an internal team meeting to debrief the project. Ask the team to come prepared to discuss 'best practices' and recommendations for the future.

☐ For complex matters, draft a memo to the file with recommendations.

Talking Points: Lessons Learned.

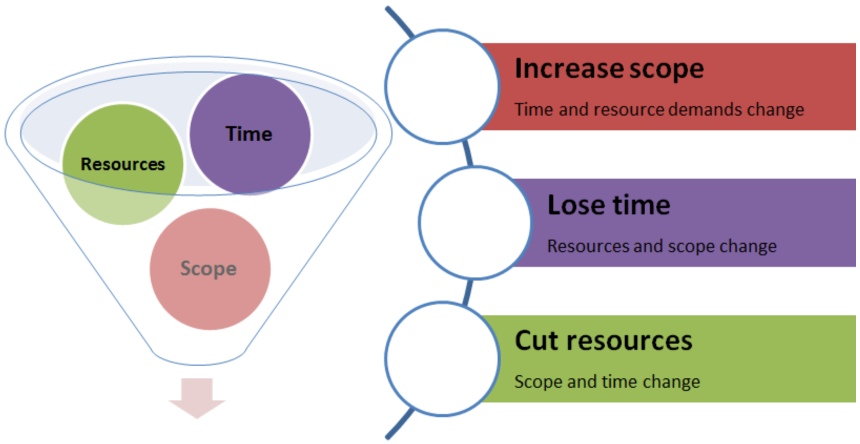
- What do you like about working with our firm?
- What could we do better?
- What could we do to make your life easier? (Hassett)

Tool: Memo to a Future Team.

For a matter that may be particularly large or complex, or for which there are many recommendations, consider asking a team member to draft a formal memo that summarizes the key lessons. Include in the memo references to document numbers for the legal research and key deliverables. Make sure the memo is part of the master file and easy to find when a similar project comes up.

The Triple Constraint.

Managing projects is like tug-of-war. All projects boil down to three main factors: 1) Scope, 2) Time, and 3) Resources. When you make an adjustment to one variable, another usually has to change. If a client needs you to take on additional work (change in scope), it could take more time, or another lawyer may need to be added to the team. If a budget is cut short (change in resources), scope may need to be adjusted. And so on.



A Phased Approach.

At the root, project management is about open communication and efficiency. It provides a common sense framework for conversations about the client's problem or need, and the work that needs to get done to solve the problem or meet the need. It forces the team (and client) to discuss:

1) The scope, and by extension, the business problem underlying the work that client is asking the firm to perform. Every problem is a business problem. What is the client's real goal?

2) The plan to address the problem. What specific activities will the firm and the client undertake?

3) The execution of the plan. How is the plan going? Are we staying on task, on budget, and on time?

4) A look back at the work. What worked really well, so we can do so again? What should we avoid doing or do differently next time?

When you start a project, get organized. Break your project into phases so you will more consistently (and more efficiently) have these important conversations with your client and team.

Tool: Communication Plan.

Using the Stakeholder Analysis you conducted in the Initiating phase, map out a plan for keeping key stakeholders informed. Decide 1) who needs to stay informed of the project, 2) the level of information they should receive, 3) how they should receive it, and 4) how often. Then, draft a communication plan to keep communications on track.

Communication Plan					
Related Phase	**Message Content**	**Format**	**Distribution (To:)**	**Sender (From:)**	**Timeframe/ Frequency**
Initiation	Discuss roles/ tasks	Video conference	Venable + Client Team	Relationship Partner	Once, not later than Nov. 15
On-going	Status report	Conference call	Venable Team	Venable Project Manager	Fridays, 2:00 pm EST
On-going	Status report	E-mail	Venable + Client Team	Relationship Partner	Bi-weekly, every other Monday.
		Memo			
		Press Release			
		Blast Voicemail			
	"Elevator Speech"	Some matters may be of interest to the media or other people outside the project. Prep the project team on an "elevator speech", or what to say/do if asked.			

Tool: Meeting Agenda.

Set a ground rule from the beginning that team members will respect one another's time. Then, lead by example with meetings that start and end on-time, and are productive.

Before a meeting, assign agenda items to team members with some indication of how long you expect discussion to take. Ask your LAA to arrange IT setup and distribute handouts. Then, start the meeting on time. During the meeting, ask one person to take notes, with action items, to be distributed to the team afterwards.

For scheduling, consider at least one "standing meeting" per week, per month, or other interval so team members can hold the time on their calendars. It's also helpful to agree on using Outlook calendars to view availability for other meetings that may come up.

Meeting Agenda			
Name of Meeting:			
Date:	**Start and end time:**		**Location**
Purpose: [By the end of this meeting we will have...]			
Attendees: [Names/roles]			
Time	**Agenda Item**	**Facilitator**	**Action Items, Deadlines, Who's Responsible**

Phase 1: Initiating

Get started by initiating a meaningful conversation with your client about what they hope to accomplish. Some project managers choose to craft a Project 'Charter'. For a law firm, the end result will always be an engagement letter. Whether you create an actual Project Charter or not, you should talk to your client about each of these areas before sending a final engagement letter.

Sample Checklist Items:

- ☐ Run a conflicts check. Complete the client intake process.
- ☐ Discuss scope and preliminary budget.
- ☐ Identify major milestones for the client.
- ☐
- ☐
- ☐

Sample Talking Points: Expectations.

- What are your goals for this matter?
- What experience has your company had with similar situations in the past?
- Are there parts of this that you want to handle within your organization?
-

Sample Talking Points: Budget.

- What do you expect this to cost? Based on our experience, it could in the range of the range of $__. How does this compare with what you were expecting?
- What factors influence the budget?

Tool: Budget.

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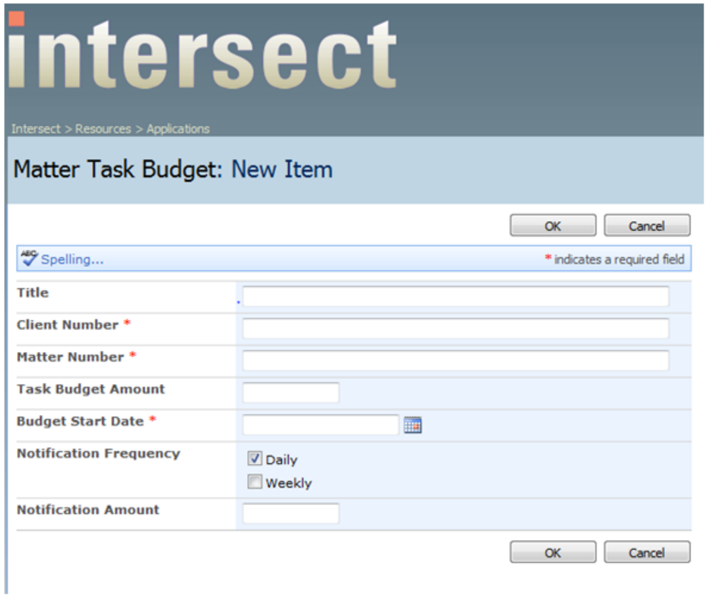
Tool: Stakeholder Analysis.

Take some time to think about all of the project stakeholders, their relationship to the project, their level of influence, and the level of communication they will need – from being actively involved to being 'fyi' informed. The PMBOK defines stakeholders as "Individuals and organizations that are actively involved in the project, or whose interest may be positively or negatively affected as a result of project execution or project completion."

Some stakeholders are fairly obvious. Others aren't. At a minimum, you should identify as your "short list" the client general counsel and his or her team, the firm's team members, and the relationship partner.

Tool: Billing Alerts.

Billing Alerts Screenshot



Phase 3: Executing

This is the crux of the matter – doing the actual legal work.   In this phase, the project manager should be the central point of contact for making sure work is being completed on-time and as close to budget as possible. The team should set up systems and processes to make sure everyone stays informed of progress, and just as quickly informed of any changes or set-backs.

Sample Checklist Items:

☐ Set up alerts in the billing system to track billable hours and budget.

☐ Create a team list (include the client) with contact information, key skills, key responsibilities. Create a team e-mail distribution.

☐ Create a team shared calendar. Include milestones, deadlines for deliverables, team meetings, regular communications, and vacation time for team members.

☐ Set up guidelines for managing documents.
  > Use a shared folder or workspace in DM or upload documents to an e-room.
  > Agree on document naming conventions. "*YYMMDD Memo to ABC Corp about XYZ*" would allow you to see the chronological history of documents just by sorting by name.

☐ Assign one person to be in charge of the master 'chron file', a physical version of the client correspondence and deliverables, organized by date.

☐ Check with team at regular intervals to see that work is being done by the projected deadlines. Consider weekly or monthly one-page status reports.

☐ Track actual performance on each task and compare it to the estimates in the WBS.

For larger projects, go further. Impress your client by asking who else in their organization might be impacted. Likewise, consider who else at the firm might need or want to know – including partners who have relationships with your client.

Short list
Client
Relationship partner
Project manager
Attorneys working on the project
Customers, vendors
Government agencies

Exercise: The Crawford Slip.

The Crawford Slip is a brainstorming exercise you can use to solicit ideas from a group of people fairly quickly, while ensuring input from everybody. Give each person in the meeting an index card and ask each person to identify 3 people or organizations that might be impacted by the project. Every 15 seconds, pass your index card to the person on your right. When you receive the next card, you must identify 3 stakeholders who aren't already listed. You can repeat stakeholders you wrote on an earlier card, but not repeat anything written on the card in front of you. Continue this exercise 'round robin' for a few minutes until you reach a comprehensive list of potential stakeholders. Then discuss.

The Crawford Slip exercise can be used to brainstorm just about anything.

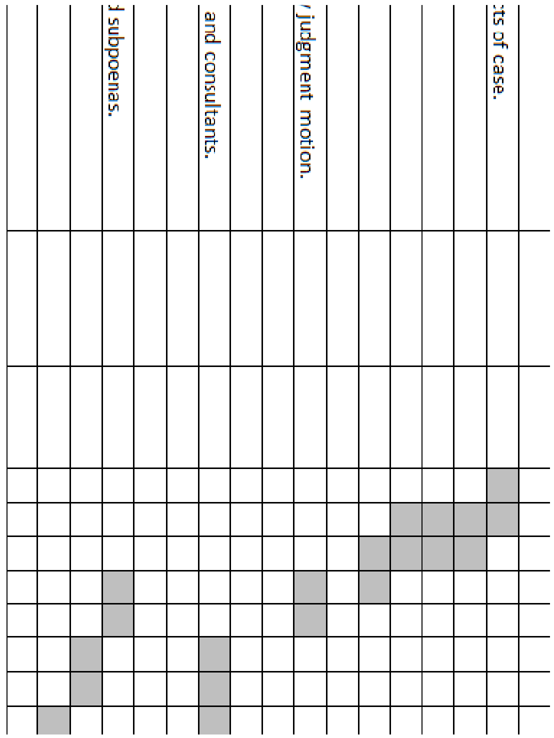
Stakeholder Analysis

How project impacts them	Impact of Project on them (1-5)	Concerns/ Issues

is appropriate to the size of your project.

Risk Worksheet			
Scenario: [How an event could jeopardize the project.]			
Probability	**Impact**	**Control**	**Index**
			Probability * Impact / Control
Financial impact:			
Action to be taken	☐ Ignore	☐ Eliminate	☐ Manage
Mitigations:			
Contingencies:			
Manager of this risk:			
Actions Taken			
Action:			**Date:**

Tool: Work Breakdown St



Tool: Risk Analysis.

For larger projects, it's important to think about any events that could throw the project off track. This might include:

- Availability of key lawyers on the project.
- Turnover of the client's employees.
- Availability of key witnesses, important experts, consultants.
- Aggressiveness of opposing counsel.
- Lack of (or withheld) information, on all sides.
- Additional plaintiffs.
- Additional jurisdictions.

You should focus your attention on the risks that are more likely to happen, and those that would have the greatest impact. Then, decide what to do about the risk (if anything) and assign someone on the team to be responsible.

The template below is a sample form to help you have a conversation with your client about risks. As with all samples in this toolkit, use a format that

Tool: Project Worksheet.

Project/Matter Title	
Project Goals and Objectives	
(What is your business goal? What do you want to accomplish or avoid?)	
Budget	
Key Resources	
Project Milestones	**Target Date**
In-scope Activities	**Out-of-Scope Activities**
(What Venable will handle.)	(What client will handle.)
Deliverables	
Assumptions	
(Clearly define assumptions on which price and scope are based.	
Remember to include the availability of resources, experts, information,	
documents, etc.)	
Constraints	
(Include billing guidelines such as won't pay for legal research, no	
junior associates, diversity.)	
Risks	
(What might happen that would change the scope of the project?	
How likely are they to happen? What would be the impact if they do?)	

- ☐ Engagement Letter
- ☐ Budget
- ☐ Work Breakdown / Schedule
- ☐ Communication Plan
- ☐ Team Contacts / Calendar
- ☐ Document Management

Deliverable: Engagement Letter.

Have a discussion of your firm's engagement letters, with emphasis on a well-crafted and specific statement of work.

"My understanding is that our representation in this matter involves [Statement of Work].

Statement of work: Summarize client's situation, the business problem or opportunity, objectives, and a high level statement of what the client has asked firm to do.

This project shall include the following activities: 1. [tasks and deliverables], 2., 3.

Exclusions: The fixed price for this matter does not cover legal costs incurred for ...

Phase 2: Planning

After the client and Venable has agreed upon the objectives of the matter, conflicts and client intake is completed, and an engagement has been signed, you will start planning the work. The planning phase puts everyone on the team (at the client and at Venable) on the same page in terms of deliverables and the project schedule. The main product of the planning phase is a detailed Work Breakdown Structure (WBS).

Sample Checklist Items:

- ☐ Schedule a team meeting to discuss what needs to get done and how.
- ☐ Create a Work Breakdown Structure (WBS).
- ☐ Assign team member responsibilities to the WBS.
- ☐ Establish intervals for progress updates.
- ☐ Communicate the WBS and budget expectations to the entire team.
- ☐ Discuss risks and 'unknowns' that may put the project off track.
- ☐
- ☐

Work Codes.

Some attorneys (and firms) are better than others when it comes to the use of work codes. Work codes are only as helpful as the time and energy put into using them correctly. Groups that are disciplined about using work codes can run reports on project tasks, which can be helpful in estimating the amount of time it may take for similar tasks in future projects. If you don't have that history, work codes can still be useful. The ABA publishes standardized work codes for various types of legal work. The codes can be used as a starting point for a high-level Budget and Work Breakdown Structure.

http://www.americanbar.org/groups/litigation/resources/uniform_task_based_management_system.html