

Case Study: LPM Initiatives at Lathrop Gage



*A LegalBizDev white paper
By Jim Hassett and Jonathan Groner
November 2017
Addendum November 2018*



www.legalbizdev.com
800-49-TRAIN

Executive summary

In November 2015, Lathrop Gage began an LPM initiative by signing up six lawyers for a two-month coaching program to identify actions that each lawyer could take immediately to improve client value and profitability. Based on its success, the firm has expanded the program to 25 lawyers to date, and supplemented it with many related efforts described in this case study.

One of the firm's most innovative steps was to form the new position of LPM Partner to assure continued progress in this critical area. While many firms have hired LPM Directors in the last few years, Lathrop Gage was one of the few to recruit someone like Dave Clark, a practicing attorney who had several decades of experience working for the firm. The benefit of this approach is that "it takes much longer to understand a particular firm's culture and operations than it does to learn the fundamentals of LPM."¹

Lathrop Gage also became the first firm to provide lawyers with LegalBizDev's electronic library of LPM tools. This enables lawyers to find exactly the information they need precisely when they need it, whether they are in their office, in a hotel room, or on an airplane.

This case study explains how Lathrop Gage's innovation culture is maximizing impact by applying the concepts outlined in our white paper "The Top Five Ways to Increase Legal Project Management Results"²:

1. Focus on changing behavior and solving problems;
2. Aim for quick wins to create internal champions;
3. Publicize successes within the firm;
4. Use just-in time training materials;
5. Assure continuous improvement by following up relentlessly.

It describes numerous examples of LPM behavior change and the benefits to Lathrop Gage clients in a variety of practice groups, including Intellectual Property, Banking and Creditors' Rights, Labor & Employment, Wealth Strategies, and Cybersecurity & Data Privacy.

1. Focus on Changing Behavior and Solving Problems

This is the most important of the five principles because, as noted in our white paper:

The key to getting started in changing behavior throughout an organization is to help lawyers solve the problems they face, such as living within a fixed fee budget or

¹ http://adverselling.typepad.com/how_law_firms_sell/2017/09/how-to-hire-lpm-staff-part-1-of-2.html

² <http://www.legalbizdev.com/files/White-Paper-Five-Keys-to-LPM-Results-Kx.pdf>

increasing realization. And the best way to do that is to first identify lawyers who are motivated to change, and then to coach them one-on-one to create quick wins.

The first steps that lawyers should take are often easy to identify. The hard part is getting them to do it.

Since completing his coaching, Tedrick Housh III, Chair of the Cybersecurity & Data Privacy practice group, has begun to use LPM in both client projects and litigation. The LPM format is a natural fit for corporate clients who engage Lathrop Gage to assess their data security and privacy policies, regimens and incident response plans. “We have spent a lot of time looking at all of our repetitive tasks,” he says, “to handle them more efficiently and make sure they are assigned to the right people.”

For each new litigation matter, his team uses an electronic timeline with all deadlines and events coming up, along with a detailed list of tasks for each pleading, discovery item or witness. This format, says Housh, “prompts regular meetings of our trial team and forces us to continually evaluate whether certain tasks have been done, and sometimes whether they are still worth doing.” As trial approaches, the form suggests more frequent points at which to engage the client in the case. “It’s certainly true that litigation is unpredictable,” Housh says, “but these tools have helped us even though we know that there will always be surprises.”

In another example, Douglas Link, an IP associate in the firm’s Boulder, Colorado, office worked with his coach to identify immediate ways in to improve his communication with clients. They developed a new engagement letter that spells out all possible steps that the firm might need to take in connection with a patent application. The new engagement letter defines the scope of representation by using task codes and provides future cost projections for the various tasks.

A third example comes from Courtney Conrad, a Kansas City-based partner in Lathrop Gage’s Wealth Strategies group. She and her group have been informally using LPM for years by creating standard forms that help it serve its estate-planning clients, saving time and money. “We have a checklist, basically an electronic binder, that is accessible to everyone in our group,” Conrad says. “It has all the elements that you need for most estate-planning matters. It’s now a Word document, but we will soon transition to a document assembly system that will be even better. Once an attorney enters the necessary names, amounts, addresses and so on, that system will produce the document. This approach can be used not just in estate planning, but in many other groups firm-wide.”

The final example in this section comes not from a program that was started by a LegalBizDev coach, but rather from coaching Dave Clark conducted with LegalBizDev’s support. Clark’s assumption of his new role as LPM Partner coincided neatly with the firm’s being retained by a major auto manufacturer to handle a large series of trademark matters. Travis McCallon, an IP team leader in the firm’s Kansas City, Missouri office, consulted with Clark during the early stages of this work, and together they worked on efficiency techniques to keep this new client happy and in the fold.

“This kind of trademark work has a lot of volume. Most individual cases are not too sophisticated, but there’s a lot to keep track of,” McCallon says. “We created an in-house matrix that gives us all the information in a spreadsheet – what has happened so far in the case and what will happen next. The spreadsheet includes the name of the alleged infringer, and it even includes a link to the content that constitutes the possible online infringement itself.”

McCallon says the Excel spreadsheet also spells out what the firm’s proposed next steps are in each case and contains a requirement for client approval before each step can take place. The client has full access to the spreadsheet and can “populate” the box for client approval, thus triggering correspondence from McCallon to the alleged infringer.

In addition, McCallon, with Clark’s input, has devised an internal checklist that his team uses to ensure that all key steps are being taken in any of these trademark infringement cases so the data is “right at our fingertips.”

As Clark summed it up, “Through the use of LPM principles, we developed a way to keep the client informed on a regular basis of what’s going on in the large number of trademark cases that we are handling at any one time. This permits the client to see the status of all the matters practically at a glance. It has made it easy for the client to understand what’s going on in each case and what the recommended courses of action are. The client has been extremely happy with this approach.”

2. Aim for Quick Wins to Create Internal Champions

The successes listed above, and many others, have begun to create a cadre of internal champions who are continuing to spread LPM within Lathrop Gage.

One broad example emerged from coaching several members of the firm’s Banking and Creditors’ Rights Practice Team. Several leading members of the team saw the benefits of using task codes to organize their work, convey the details of the work effectively to clients, and improve budgets.

Following Clark’s recommendation, the group implemented a task code pilot project in June 2017, requiring the use of firm task codes on all new litigation matters opened by that group. Clark worked with the firm’s accounting department to design and implement the task code project, created training materials on the proper use of the task codes by all attorneys and paralegals in the group, gave presentations on the pilot project at team meetings, and had a special training session for secretaries on the correct use of these task codes. In conjunction with this pilot project, Clark’s LPM team created an in-house spreadsheet tool to assist lawyers with creating and monitoring budgets utilizing litigation task codes. In addition, Clark and his team are working closely with a global business intelligence company specializing in legal and professional services firms to help it develop a robust matter planning and budgeting software program that will serve the firm’s long-term needs.

Throughout this coaching program, each lawyer focused on their “low hanging fruit,” the changes that would have the most immediate benefit to their practice. For example, Rick Bien, Co-chair of the Business Litigation Team and leader of the firm’s ERISA, Life, Health, and Disability Insurance Group, created a personal docket for keeping track of all matters – a single document to see the interrelationships between matters. For one large matter, he also created a RACI matrix, a simple chart that will increase efficiency and communications by clarifying the roles of team members in completing tasks and deliverables. It establishes the level of communications each team member should receive. RACI is an acronym for who’s *Responsible*, who’s *Accountable*, who should be *Consulted*, and who should simply be *Informed*. (For details, see page 217 in the fourth edition of the *Legal Project Management Quick Reference Guide*.) The result of thinking through that matrix was that it helped Bien decide when and how to communicate with the client’s GC and its business executive as the matter progressed.

Banking & Creditors’ Rights Litigation Co-Chair Wendi Alper-Pressman focused on delegating work more effectively so that each team member understands exactly what she expects, when it is due, and the estimated hours in the budget. Employment partner Bridget Romero focused on tactics to better use Statements of Work and Matter Planning Templates to clarify understanding of the client’s objectives at the start of a matter. Jill Waldman, another Employment attorney, is standardizing her procedures to set baseline budgets upfront for all significant matters, and tracking and monitoring costs as the matter proceeds.

Wealth Strategies partner Gretchen Gold drafted new procedures for vault usage, and had them reviewed and edited by a team of Lathrop paralegals. Then she met with Lathrop’s Records Department personnel and coached them on the scanning and indexing of documents in the vault, including naming conventions and sequencing. She also has begun drafting instructions to non-timekeepers who will be responsible for a quality checking process for scanning and bar coding documents in the vault.

In another example of her work as an internal champion, Gold successfully coached another partner how a task done at her higher rates could generate a client cost that was lower than the combination of that partner’s time/rates plus inexperienced associates/rates doing the same work.

3. Publicize Successes Within the Firm

Even in a firm that is as well attuned to LPM as Lathrop Gage, there will be some resistance by attorneys to the adoption of any new practice concept, including LPM. Internal publicity is one way of countering that resistance.

“There are always obstacles,” Clark says. “There are lawyers who say that they don’t need it or that clients don’t want it or that there’s not enough time to do it. There’s always going to be some resistance, and part of my job is to understand, for each lawyer and practice group, what problems they have in their practice, and what LPM tools or templates will help them. Lawyers have started to notice that LPM is being mentioned more and more by clients, and that has helped to encourage them to start adopting LPM principles and practices.”

To date, internal publicity has largely been informal, as lawyers have shared tactics that have worked.

For example, when Douglas Link completed coaching he began developing a standard checklist for each patent-application project that can be accessed by all members of the team and by in-house counsel for the client.

“The checklist is simply a list of all possible tasks for the project. It’s basically a shared Word document. We start with a basic checklist and then we develop an individualized checklist for each client,” Link says. “It happens that this is a very repetitive practice area, without a lot of unexpected events, so checklists work very well. You can use checklists and task codes to estimate costs and make the cost estimates more accurate. This is especially advantageous when the firm is working on a flat-rate basis.” As a result of Link and others acting as internal champions, the entire Boulder office, which is devoted to IP matters, is now using this checklist.

Similarly, McCallon reports that “Anyone on my team and anyone on the client’s team can find out where any matter stands and can generate a monthly report. Because we share this with the client, the spreadsheet is straightforward, professional and comprehensive.”

Over the next few months, one of Clark’s key goals is to help build further momentum for LPM by setting up formal mechanisms and a regular schedule to publicize LPM successes, focusing on the benefits both to clients and to the firm. This can be accomplished particularly well at partners’ meetings or through individual face-to-face or telephone conversations with partners.

4. Use Just-in-Time Training Materials

All examples in this case study reflect LegalBizDev’s emphasis on “just in time” training, which addresses individual problems as they arise. This can be contrasted to a traditional approach to LPM training which relies on workshops to educate people about the entire field, and then hoping they remember to apply the relevant concepts months or years later.

The just-in-time approach is most effective when it is supported by an extensive library of tools and templates that people can use when they need them. In most professions, just-in-time training materials have become the standard way to teach new skills. For example, when people need to use an unfamiliar feature of Microsoft Word, very few would consider taking a class or looking it up in a book. They simply find the exact information they need in online help, precisely when they need it.

Until this year, LegalBizDev’s library of tools and templates appeared only in a printed book: the *Legal Project Management Quick Reference Guide*, now in its fourth edition.

In 2017 we began offering firms licenses to the fifth edition, an evolving electronic library that can be accessed by any lawyer at any time whether they are in their office, in a hotel room, or on an airplane. This approach also makes it easier to update new tools every few months, and allows firms to customize our tools to their needs, and add their own templates to the library.

Lathrop Gage was the first firm to license this online library. As of the date this case study was written, five other firms ranging in size from 100 to 800 lawyers have licensed the electronic fifth edition.³

Even before these templates were placed on Lathrop Gage's intranet, Clark used the library in his coaching by emailing lawyers just the tools they needed in the form of short pdfs. For example, when Stephen Dexter, a lawyer on the firm's Banking and Creditors' Rights team, started a new bankruptcy matter for an existing client, the client wanted a phased budget which took into account the estimated costs of various litigation tracks the case might take. Clark emailed Dexter relevant tools from the library on planning and managing a budget and that made it easier for him to send the client the type of budget they requested, and to track costs as the matter proceeds.

In addition, Clark says, "One of the things that I do on a regular basis is to speak with team leaders and executive committee members to get an idea of what efficiency tools and templates we need. We have already developed some Lathrop-specific tools, and included them in the online library, and plan to develop many more." Given that LegalBizDev is also developing new tools every few months, this online library has become a living resource that gives every Lathrop Gage lawyer instant access to the latest advances in the field.

5. Assure Continuous Improvement by Following Up Relentlessly

LPM is not a simple set of procedures that law firms can put into place, and then move on to the next challenge. Instead, it is an ever-evolving set of techniques that requires consistent attention and support. In 2016, the firm decided to hire a full-time LPM Director, and consulted with LegalBizDev about the most effective way to conduct a search.

They ultimately agreed with the approach we outlined on our recent posts on "How to hire LPM staff,"⁴ including our recommendation that "It takes much longer to understand a particular firm's culture and operations than it does to learn the fundamentals of LPM... [Therefore], the best candidate may be someone who already works at your firm as a lawyer or a senior legal assistant...."

According to LPM Partner Dave Clark: "The firm decided to put the program in the hands of a partner who was already here, one who knows how our firm thinks. They asked me and I agreed. I set aside my full-time IP practice in order to implement LPM here at the firm. We felt it was very important to change lawyer behavior, and what better way to do that than to put someone in charge of the program who has been here more than 30 years and who knows all the lawyers and the pressures that they face on a daily basis? My partners know that I understand their needs and practices. My daily role is to help the lawyers provide value and increase efficiency. My previous role as an IP partner helps open doors."

³ http://adverselling.typepad.com/how_law_firms_sell/2017/03/six-law-firms-take-legal-project-management-just-in-time-training-to-the-next-level.html

⁴ http://adverselling.typepad.com/how_law_firms_sell/2017/09/how-to-hire-lpm-staff-part-1-of-2.html

An LPM director drawn from the partner ranks is much more likely to visualize the possibility of immediate efficiency gains in particular cases and practice groups on an ad hoc basis, tailoring solutions to specific matters rather than developing a top-down approach to LPM.

One of the first things Clark did after completing certification was to set up individual meetings with more than a dozen practice leaders and members of firm management. From these interviews, “It became clear that budgeting and pricing tools and practices are a priority with virtually every practice team,” he says. “Creating practice-specific checklists and improving work flow and processes were also important to many teams. In addition, some teams, particularly litigation teams, have a need for improved practices and tools related to setting objectives and defining the scope of a matter with the client.”

Clark sees a major part of his job as “identifying possible inefficiencies in our client work and correcting them to bring value to our clients.” Accordingly, he is looking to train and work with lawyers who not only can help him identify such areas of improvement, but also are open to follow up and implement new systems.

Clark recently reviewed the characteristics of those lawyers who had previously gotten the most out of past LPM programs with LegalBizDev. He then created a profile for the most promising future participants, in the interest of identifying people who were likely to succeed with LPM. He discussed with the task force which practice groups and individuals would be the best ones to focus on. Before accepting any candidates into the next round of coaching he will conduct, he is verifying that each one is motivated and has adequate time to work on the program.

Clark expects his role to continue to evolve. “In LPM, the bar is always being raised. A firm that was an innovator in this area just a couple of years ago can now be easily overtaken by other firms that begin to focus on LPM. Now that so many firms have LPM programs, what was good enough to win new business last year in a competitive market may not be good enough this year.”

Addendum – One Year Later

In November 2018, LegalBizDev CEO Tim Batdorf conducted an interview with David Clark, Lathrop Gage's LPM Partner, to determine the status of LPM at Lathrop Gage one year after the original case study.

LegalBizDev: How would you describe LPM's progress at Lathrop Gage in the year since we published our case study?

Clark: LPM is continuing to change our firm's culture and the way our lawyers practice law. More and more lawyers are applying its principles every day, and clients are reaping the benefits.

It's always hard to know exactly how things like LPM progress compares across firms. But when I listened to LPM leaders at the [P3 conference](#)⁵ in Chicago last spring, I got the sense that Lathrop Gage is far ahead of the curve.

LegalBizDev: Why do you think you are ahead of many other firms?

Clark: Because of our unrelenting focus on changing lawyers' behavior through the one to one coaching I've been doing.

LegalBizDev: Can you give me a few examples?

Clark: Of course. One of the issues that often comes up in my LPM coaching is how to improve delegation to the most cost-effective time keepers; getting paralegals, legal assistants, library folks, and so on involved in some of the tasks appropriate for them to handle in order to lower the costs to clients. In our one to one coaching, several lawyers have increased not only the amount of delegation they do, but also its effectiveness.

Process improvement is another interesting example. Some firms have developed complex and time consuming approaches to process improvement. Using the much simpler approach summarized in several [recent posts in your blog](#)⁶, several lawyers I coached have very quickly found areas for improvement. For example, one lawyer I coached simplified a tracking spreadsheet so that it quickly communicates the information necessary to other team members without being too complicated.

Budget planning and tracking is at the heart of LPM, and several lawyers I've coached have also begun to implement task codes to get better financial information. For example, our new business litigation practice group leader recently completed a one to one coaching program with me and is now in the process of improving budgeting by requiring his group to use mandatory task codes.

⁵ <https://www.legalmarketing.org/blog/2018-p3-conference-recordings>

⁶ https://adverselling.typepad.com/how_law_firms_sell/2018/10/four-approaches-to-business-process-improvement-part-1-of-2.html

LegalBizDev: Have any practice groups implemented task codes yet as a result of your coaching? If so, how did it impact the way they practice law?

Clark: Yes, several groups have begun to implement task codes. Of course, to use them effectively you need to have a budget and you need to track that budget against actual expenses. A number of partners are now using that information to determine ‘OK to make this matter profitable for us and cost effective for the client we need to delegate some work down and we need to leverage more of it.’ Or ‘This is taking longer than we budgeted for this phase, so we need to get more efficient.’

Task codes are not a panacea. Frankly, entering them can be a pain in the neck. But they allow us to harness the financial data we have, and a lot of other things flow from that.

LegalBizDev: With other clients, we’ve found that task codes produce the fastest benefits with fixed price arrangements. Has that been your experience?

Clark: Yes, the most immediate benefits to the firm are usually seen in fixed price deals. For example, one of my partners, Chris Feldmeir, works with our franchisor clients on monthly retainers. When I coached Chris, one of his clients was paying the firm on a monthly retainer basis. Working together, we set up a set of task codes to analyze how much time and effort was being spent on discrete tasks included within the retainer arrangement. The result is that Chris is now better able to fully meet the client’s needs, while also ensuring that it remains profitable for the firm.

LegalBizDev: Can you give me another example of the benefits of LPM coaching?

Clark: Of course. The case study published last year⁷ discussed my initial work with partner Travis McCallon for an automobile manufacturer client that wanted to come up with an enforcement system to protect their trademarks from infringers. Things like tire wheels and hood ornaments are distinctive, and lots of mom and pop type operations try to copy them, create knock offs, and sell them out of garages and small shops.

Travis was engaged to focus on these small infringers with the goal of stopping the infringing conduct. Most of these infringers had few assets you could collect upon even if you could prove infringement. However, these trademark enforcement efforts are still important because if manufacturers know of infringements, but take no action to stop them, they could be accused of waiving their trademark rights.

There were a large number of potential infringements which Travis had to identify and track. Then for each, he had to work with the client to determine what kind of action, if any, was required. The project included efficiently sending out cease and desist letters and other communications, monitoring these enforcement efforts, and keeping the client fully informed.

⁷ <http://www.legalbizdev.com/files/LegalBizDev-Case-Study-Lathrop-Gage-2017cx.pdf>

Since it didn't make economic sense to take formal legal action against most of these infringers, it was very important that this effort be sustainable and cost effective. I helped Travis apply LPM principles to think through the options and refine some of the details, and he did the rest.

LegalBizDev: Several of the examples discussed earlier sounded like areas where our tools and templates⁸ on developing checklists would be especially helpful.

Clark: They were. Having a comprehensive checklist makes the process more efficient. A checklist ensures that all steps are being taken, and that the appropriate people are doing the appropriate tasks. A checklist also improves the process because as you think through the steps, you must determine who should take each step, what documents are associated with each step, and who needs to do it. Without the systematic approach of LPM, many checklists are developed "catch-as-catch-can." One result of not having a checklist (or having a poor one) is inconsistency in who performs certain tasks. Attorneys perform tasks at times, while paralegals do the same tasks at other times. In addition, the person performing the task would have to try to find forms. The net result often was a wasteful and inefficient effort.

In fact, developing more effective checklists was the key focus of my LPM coaching for a number of lawyers.

A good example is the LPM coaching experience of Courtney Conrad, the head of our Wealth Strategies group. In our coaching program, Courtney developed a "checklist on steroids" to be used in both basic estate planning and more complex situations. Then she made that checklist accessible to the rest of the Wealth Strategies group. It has made a number of lawyers in her group more efficient – since they don't have to reinvent the wheel – and also assures that all the things that need to be done in a particular situation actually get done.

LegalBizDev: Do you think that in some cases lawyers would have created checklists and other systems like this even if they had not gone through the LPM coaching process?

Clark: Yes, in some cases. In estate planning, checklists are pretty standard. And when lawyers plan fixed price retainers, of course they look at some past bills and talk to people on their team. The difference with LPM coaching is that lawyers attack the problem more systematically and more effectively, thus increasing their impact.

LegalBizDev: How often do you use the LPM tools and templates⁹ Lathrop purchased when they designed this program?

Clark: All the time. It's been very useful to have the latest tools in a form that allows me to send each lawyer exactly the information they need, just when they need it, whether it's a list of 15 questions to help lawyers define scope, a checklist for personal time management, or advice about how to deal with difficult clients and situations. Having the details available in a short written form saves significant time for me, and makes it easy for lawyers to refer back to the details when they need them.

⁸ <http://www.legalbizdev.com/projectmanagement/index.html>

⁹ <http://www.legalbizdev.com/projectmanagement/index.html>

A lot of lawyers just get stuck because they don't know what to do or what the next step is. The online library supports the coaching in that it gives some concrete examples of how some of these principles and techniques and tools are being used by lawyers at other firms. The result is not necessarily “I’m going to do it exactly like that.” Instead, they say: “OK, I see how they set this up. I could do something similar with the checklist that I have in mind.” The tools give them ideas and samples that they can work off.

These online tools also help push them to develop a spreadsheet or a checklist that they've been thinking about – but never got around to completing – and to develop a better version more quickly than what they could have done without examples.

LegalBizDev: You said the online tools “help push” the lawyers. Does coaching also provide a push?

Clark: Absolutely. I often hear that “I've always wanted to do this, but coaching gave me the push to actually do it.” For many lawyers, LPM is just “white noise” until they engage in LPM coaching and experience its benefits firsthand. After LPM coaching, lawyers begin to put all the dots together.

LegalBizDev: When we wrote the original case study last year, this type of one to one coaching was one of the most important elements of your firm’s LPM initiative. Is that still the case?

Clark: Yes, more than ever. In my role as LPM Partner, I spend much of my time applying the techniques I learned when I became a Master Certified LPM Coach™¹⁰. The certification program highlighted for me what some of the more important principles in each of the eight key issues of LPM¹¹ are.

More importantly, the program recognizes that lawyers are busy, so you need to tailor coaching to each lawyer, and focus on what their specific issues and challenges are. With the next step then being to direct them to the online library of tools that best address the issues each lawyer cares about.

It’s one thing to understand LPM at a theoretical level, and another to know how to apply it or coach it as a practical matter. The coaching certification program made me much more cognizant of what actually works than I would have been if you had just handed me the book and said: “Knock yourself out.”

LegalBizDev: How many lawyers have you coached since you were certified as an LPM coach?

Clark: In the past year, I have completed one to one LPM coaching with 17 lawyers, and am now coaching 11 more, for a total of 28 lawyers so far. The feedback has been extremely positive. More and more of our lawyers are volunteering and seeking me out for coaching. For

¹⁰ <http://www.legalbizdev.com/files/Master-Certified-LPM-Coach-Program-Bx.pdf>

¹¹ <http://www.legalbizdev.com/projectmanagement/index.html#contents>

example, when numbers come out, lawyers now approach me and ask for my help in reducing write-offs.

LegalBizDev: When you include the lawyers that we previously coached, approximately 60 of your lawyers have completed in-depth, one to one LPM coaching. How has LPM coaching changed your firm's culture?

Clark: Many of the lawyers who have been coached have become internal champions of LPM. They have informed other lawyers about certain tools and templates and have also encouraged them to participate in the coaching program. Those lawyers who have completed the coaching program are also more likely to consider whether there might be an LPM solution to a problem or challenge they are facing.

LegalBizDev: Can you sum up the benefits the firm has experienced so far?

Clark: Very simply, LPM is enabling us to increase client satisfaction. We are communicating more effectively with clients, and providing more cost-effective service. It is also increasing the firm's profitability by ensuring that lawyers better plan and budget work, especially in cases where there are fixed fee arrangements or hourly arrangements with a firm cap.

LegalBizDev: Is the firm committed to continuing to focus on LPM?

Clark: Yes, now more than ever. I am currently working with a group of lawyers and other firm personnel who are focusing on a number of initiatives to improve service and value to clients through innovative approaches. One key reason that LPM coaching has worked is that it has been consistently supported by the firm's management. And I expect this support will continue to increase. When Cameron Garrison took over as managing partner this year, the American Lawyer post announcing his appointment¹² was headlined: "Lathrop Gage's New Leader Stresses Innovation, 'Re-Imagining Everything.'"

LegalBizDev: Do you have any advice for other firms that would like to implement LPM?

Clark: Yes. If you fail to change lawyers' behavior it will have no impact on client satisfaction or firm profitability. So I would recommend that other firms do what we've done. Start small, perhaps with a pilot group of lawyers for coaching. After that succeeds, and internal support increases for the concept, then look for the most cost-effective ways to get more lawyers onboard.

¹² <https://www.law.com/americanlawyer/sites/americanlawyer/2017/10/24/lathrop-gages-new-leader-stresses-innovation-re-imagining-everything/>

About the authors



Jim Hassett is the Chairman and founder of LegalBizDev, which helps law firms increase profitability by improving project management, business development, and alternative fees. Before he started working with lawyers, Jim had 20 years of experience as a sales trainer and consultant to companies from American Express to Zurich Financial Services. He is the author of 13 books, including the *Legal Project Management Quick Reference Guide*; *Legal Project Management, Pricing, and Alternative Fee Arrangements*; *Client Value and Law Firm Profitability*; and the *Legal Business Development Quick Reference Guide*. He has also published more than 80 articles in the *New York Times Magazine*; *Bloomberg Law*; *Of Counsel*; *Legal Management*; *Strategies: The Journal of Legal Marketing*; and other publications. Jim has spoken frequently at law firms and at bar associations (including the New York City Bar, the New York State Bar, and the Massachusetts Bar), Harvard Law School; the Association of Corporate Counsel; the Defense Research Institute; the Ark Group; at the P3 conference; and at Legal Marketing Association meetings in Boston, New York, Philadelphia, Washington, Savannah, and Vancouver. He has conducted webinars through the Ark Group; West LegalEdcenter; the National Law Journal; The International Lawyers Network; TAG Academy; and the Legal Marketing Association. Jim writes the blog “Legal Business Development” which was featured at the ABA TECHSHOW (in its list of “60 Sites: Latest and Greatest Internet Hits”) and by TechnoLawyer (in its list of “the most influential legal blogs” in BlawgWorld). He received his Ph.D. in psychology from Harvard University.



Jonathan Groner is a public relations specialist, a freelance writer, and a lawyer. He has previously worked as a marketing manager at Jenner & Block, as senior communications counsel at Womble Carlyle, and as managing editor at *Legal Times*.

About LegalBizDev

LegalBizDev helps law firms increase client satisfaction and profitability. We literally wrote the books that helped start the legal project management movement, and are also widely recognized as leaders in legal business development.

While many competitors offer educational programs in these important areas, only LegalBizDev has developed proprietary processes to help lawyers change their behavior. LegalBizDev offers coaching, webinars, workshops, publications, and more to help each lawyer identify the action items that are most likely to produce immediate and practical results for their practice, their personality, and their schedule.

Through a strategic alliance with Altman Weil, we also offer clients a broad range of management consulting services in related areas, including strategic planning, practice group management, client surveys and custom benchmarking, lawyer compensation systems, marketing strategy, and much more.

LegalBizDev has developed and delivered award winning training since 1985. For more information, visit our web page at www.legalbizdev.com or contact us today to discuss the best way to meet your unique needs.



225 Franklin Street, 26th floor
Boston, MA 02110
800-49-TRAIN
www.legalbizdev.com
info@legalbizdev.com

© Copyright 2018, LegalBizDev. Brief excerpts or quotations may be reproduced without advance permission and should be credited to LegalBizDev. This document may be freely copied and distributed. For more details, see www.legalbizdev.com.