

**Why is LPM so important for lawyers?**

There are three main reasons that the legal project management (LPM) movement has begun to transform the profession over the last decade:

1. The legal marketplace has become increasingly competitive.
2. LPM increases client satisfaction and firm realization/profitability.
3. Clients want LPM.

**What is the most effective way to implement LPM?**

In more than a decade of consulting and doing research with hundreds of law firms – ranging in size from eight lawyers to over 4,000 – LegalBizDev has consistently found that the most effective way to change lawyers’ behavior is to work with a legal project management expert in a one-to-one coaching program. (See Attachment A).

**What are the most critical factors for success?**

1. Motivation: The most effective coaching programs focus first on the lawyers and staff who are most motivated to change behavior.
  2. Speed: Busy lawyers need to quickly see immediate benefits.
  3. Coaches: The best coaches have backgrounds that combine knowledge of LPM techniques and extensive experience working with lawyers.
  4. Tools and Templates: One key to success is providing lawyers with access to a library of LPM tools, allowing them to find exactly the information they need to increase efficiency, when they need it.
- (See Attachment B).

**How does the coaching process work?**

There are many models for LPM coaching, ranging from informal advice from colleagues to formal programs offered by a variety of consultants. See Attachment C for an outline of LegalBizDev’s proprietary coaching process and Attachment D for typical comments from lawyers who have completed our program.

**How much does it cost?**

The LegalBizDev program outlined in Attachment C costs \$4,000 per lawyer. If a firm launches a program for four or more lawyers, LegalBizDev also provides monthly reports, review telecons, and an introductory webinar at little or no additional cost. (See Attachment E).

**How can I get started?**

If you are interested in LegalBizDev’s one-to-one coaching program, contact us today at 800-49-TRAIN (800-498-7246) or [info@legalbizdev.com](mailto:info@legalbizdev.com).

## Attachment A: LPM benefits and coaching results

LPM increases client satisfaction and firm profitability by applying proven techniques from other professions to improve the management of legal matters.

The fundamental benefits of the LPM movement are implicit in the definition above. More specifically, LPM helps lawyers resolve such common challenges as:

- Clients refusing to pay for work you've billed
- Extensive write-offs on prebills
- Clients demanding deep discounts
- Clients who are surprised by unexpected developments or fees
- Clients feeling "out of the loop" or uninformed
- Difficulty meeting deadlines
- Team members who are not as productive as you'd like
- Team members who charge more to a project than you'd expect
- Inability to know where your budget stands until it is too late
- Clients assigning you a budget or imposing tight cost constraints on your work
- Too much work and too little time

The table below lists some typical behavior changes that lawyers identified for themselves from past LPM coaching programs, and the benefits they experienced:

LPM behavior change	Benefits
For every matter over \$50K, shared a description of project scope and assumptions with everyone on the project team	<ul style="list-style-type: none"> <li>• Team members became more familiar with what each budget included &amp; excluded</li> <li>• Improved cost predictability &amp; client satisfaction</li> </ul>
Required lawyers to use a special task code to identify any work that was performed, even if the work was technically beyond scope	<ul style="list-style-type: none"> <li>• Kept lawyers more aware of the scope of the agreement</li> <li>• Allowed relationship partner to negotiate change in scope with the client where appropriate</li> </ul>
Established a procedure to provide written summaries of strategic objectives to clients for their review at the beginning of every new matter (later adopted by entire firm)	<ul style="list-style-type: none"> <li>• Improved client satisfaction</li> <li>• Led to more accurate budgets &amp; increased realization</li> </ul>

<b>LPM behavior change</b>	<b>Benefits</b>
At the start of a large matter, used our matter planning template to create a list of key sub-tasks and assignments, then asked team members to estimate how many hours each sub-task would take them	<ul style="list-style-type: none"> <li>• Team members completed most tasks within the time estimates they provided</li> <li>• Led to more accurate bids, increased realization, and new business</li> </ul>
Explained our risk analysis template to a key client and then used it to assess their budget in an early litigation case assessment	<ul style="list-style-type: none"> <li>• The client loved the template and used it to structure discussion of risks vs. costs</li> <li>• Resulted in increased client satisfaction &amp; cost control</li> </ul>
Developed a new fixed-fee product for consultations in a specialized area by working with a coach to identify all sub-tasks required and the range of possible time to complete each	<ul style="list-style-type: none"> <li>• Increased new business by offering a fixed-fee product in a specialized area before competitors did</li> </ul>
Added cover memos to monthly invoices with a bullet point summary of the progress of each matter and the expected remaining costs	<ul style="list-style-type: none"> <li>• By explaining the rationale for each fee and managing client expectations, the lawyer avoided surprises and increased realization</li> </ul>
Developed a checklist of questions to ask at the beginning of each case to better define scope and assign lawyers to cases	<ul style="list-style-type: none"> <li>• More accurate bids, better team assignments, and lower costs to clients</li> </ul>
Arranged to have the accounting department provide “tickler” emails sent automatically when certain financial milestones were reached, such as when 50% of the budget was spent	<ul style="list-style-type: none"> <li>• Improved budget tracking led to cost control</li> <li>• Avoided surprises by enabling early discussions with clients of possible scope changes</li> </ul>
For a multi-million-dollar flat fee for handling a large number of litigation matters, the relationship partner designed spreadsheets showing cost-to-date and cost-to-estimated-completion for each matter, which made it easier to quickly spot where there were significant overages in a given month	<ul style="list-style-type: none"> <li>• Early identification of problems improved discussions of reasons for cost overruns and ways to control them in the future</li> <li>• Ultimately led to the fixed fee arrangement becoming more profitable</li> </ul>
An IP lawyer used our matter planning template and identified 12 critical steps that were required for every patent application and a likely range of hours for completing each step	<ul style="list-style-type: none"> <li>• Team members were able to easily compare their effort on each step against expectations and increase efficiency</li> <li>• Improved client satisfaction and increased new business</li> </ul>
At the end of a matter, the relationship partner conducted a short “lessons learned” review with the client	<ul style="list-style-type: none"> <li>• The discussion led not only to ideas for increasing efficiency but also to additional referrals of similar matters</li> </ul>

LPM behavior change	Benefits
Senior partner who had to approve write downs identified a few key partners with high write-down rates and interviewed them about the causes and possible cures	<ul style="list-style-type: none"> <li>• Each lawyer developed a personal action plan to reduce write-downs</li> <li>• The firm improved realization</li> </ul>
A practice group required team leaders to hold weekly internal team status meetings for each matter over \$100,000	<ul style="list-style-type: none"> <li>• Avoided duplication of effort</li> <li>• Led to early identification of issues that could expand scope</li> </ul>

**Attachment B: LPM tools and templates**

The fifth edition of our *Legal Project Management Quick Reference Guide* is an online library that helps law firms accelerate LPM progress. It provides LPM Directors, champions, and others with over 150 tools and templates which have been proven to increase client satisfaction and firm profitability. Each license also includes consulting support and handouts to help LPM leaders determine the best way to assure that lawyers actually use these tools.

New tools and templates are added twice a year so that lawyers can easily keep up with developments in this rapidly changing field. The latest list of tools can be found on our web page.<sup>1</sup> Relevant LPM tools can be: (i) provided to lawyers as they need them, (ii) made available on your intranet, and (iii) customized to meet lawyers’ specific needs.

In most professions, “just-in-time training” materials like these 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. Instead, they simply look up the information they need, when they need it. **This product is the first and only set of “just-in-time” tools currently available in LPM.**

These cutting-edge tools are an unmatched resource summarizing what’s worked for LPM at other firms, and what hasn’t. Instead of paying to reinvent the wheel, firms can now start from a proven foundation that has helped thousands of lawyers. Whether it’s planning a bid, defining scope for a new matter, improving client communication, or improving efficiency in other ways, this library of LPM tools and templates will help your firm increase value, client satisfaction, and firm profitability on both hourly and alternative fee arrangements.

Four previous editions of these tools have been tested and refined in dozens of firms, providing value to over 100,000 lawyers. Firms that have not yet invested in a license for the online fifth edition use the prior edition published in book format (last published in 2016). Additional details about the online LPM library of tools and templates can be found on our web page (see <https://www.tinyurl.com/LPM-Tools>).

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<sup>1</sup> <http://www.legalbizdev.com/projectmanagement/index.html#contents>

## **Attachment C: LegalBizDev's approach to LPM coaching**

After more than a decade of consulting and research with hundreds of law firms, LegalBizDev has developed and refined a proprietary LPM coaching approach which is used by its consultants, and by lawyers and LPM staff who have completed our Master Certified LPM Coach program™.

This approach includes unlimited coaching for two months, built around a weekly phone call. The precise content is customized to each lawyer's needs using our "just-in-time-training" tools described in Attachment B. Typically, a lawyer will begin by selecting an active client or matter and then identifying which of eight key issues in legal project management are most critical to meet the lawyer's near-term goals.

Each participant receives access to our *Legal Project Management Quick Reference Guide* and is directed to tools, templates, and descriptions of best practices to determine which are most relevant to the individual's situation. The participant then selects possible action items, discusses them with their coach, and makes a commitment to act. The coach supports the lawyer, monitors progress, and adjusts tactics based on results.

During the program, coaches help lawyers and staff quickly select the LPM tools that are most likely to result in immediate benefits for their immediate situation. The coaching also helps lawyers and staff become aware of all the other LPM tools that may be helpful in the future, and when to use them.

Our initial program lasts for two "coaching months," and each lawyer is expected to complete at least eight calls within two calendar months. If there are delays as a result of work conflicts or other issues, the program can be extended up to two additional calendar months or until eight calls have been completed, whichever comes first.

## **Attachment D: What lawyers say about LegalBizDev coaching**

"This coaching was far from a theoretical exercise... This was a discussion of specific matters that were before me and how to approach them... [It] has been very beneficial to me in client management and in client development. I believe that it applies to all areas of law."

– *Albert Dotson, Partner, Bilzin Sumberg*

"This training forced me to think about administrative matters for my clients on a regular basis – things I have to do anyway – and focused my attention in a way that improved client service and financial results."

– *Mike Tuteur, Partner, Foley & Lardner*

"Building awareness of the need for better project management is best achieved through coaching individual by individual. While that may seem less efficient with respect to time, it works much better than global education."

– *Stacy D. Ballin, Partner and General Counsel, Squire Patton Boggs*

“Not only has this been useful to me, but it has really been fun. I wasn’t expecting that. At a certain point, after almost 30 years of practicing law, I thought there wasn’t anything much new for me to do or learn. Now I have new goals and objectives, and every day I think about how I can improve what I do and offer better and more cost-efficient service. It is something new and something creative, so I feel energized and engaged.”

– *Catherine Johnson, Partner, Hanson Bridgett*

“This approach is outstanding because it produces incremental improvement. Don’t hold a series of committee meetings for a year and then do a top-down analysis. Just do something. This will spread project management, because when lawyers succeed, others in the firm will imitate their success.”

– *Camden R. Webb, Partner, Williams Mullen*

“In the LegalBizDev project management workshop, participants were engaged and focused. They identified useful action items and are prepared to move forward. Your efforts were valuable and well worth the investment. It would have taken considerably more time and money for us to have gotten this far on our own.”

– *Bruce Clearing Sky Christensen, Executive Director, Warner, Norcross & Judd*

## **Attachment E: For decision makers who are considering a coaching program**

LegalBizDev’s one-to-one individual coaching program maximizes flexibility, because any number of lawyers can start the day that each person is ready to begin. For groups of four or more lawyers coached simultaneously, LegalBizDev will also:

- Provide a monthly report summarizing what each lawyer has accomplished to date, what is planned for the future, and what the firm should do to assure sustainability
- Offer monthly meetings with management to assess the program’s impact and identify steps to sustain progress

In some cases, firms choose to begin their program with a group workshop for coaching participants (the session can also include an unlimited number of observers) which can be offered in multiple offices at the same time in a 90-minute training webinar.

This group approach can be particularly effective when you want to create the first internal champions for legal project management, or when the participating lawyers are from the same practice group or share a common goal. All workshops include two months of coaching calls exactly as described in Attachment C.

As a final point, please consider that our strategic alliance partner Altman Weil has been conducting in-depth law firm surveys for the past several years. In our estimation, no other consulting firm has as much “inside” knowledge about the internal workings of law firms. When reviewing the results of LPM coaching programs like ours, Altman Weil consultants Tom Clay and Eric Seeger concluded:

Perhaps no other long-term initiative will do more to support staffing innovation, pricing innovation, efficient delivery of services, improvements in margin, and reductions in overhead than true project management training. It's important to distinguish between a one- or two-day seminar which will not produce much long-term value, and a systematic, hands-on approach that instills fundamental operational change. Firms that give their people the right kind of tools and training in this area will create new efficiencies for clients, improve profitability of matters, and create significant competitive advantage.<sup>2</sup>

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<sup>2</sup> [http://www.altmanweil.com/dir\\_docs/resource/f68236ab-d51f-4d81-8172-96e8d47387e3\\_document.pdf](http://www.altmanweil.com/dir_docs/resource/f68236ab-d51f-4d81-8172-96e8d47387e3_document.pdf), viii