



**Sample menu**

The digital fifth edition of our *Legal Project Management Quick Reference Guide* enables firms to substantially accelerate LPM progress. This resource provides LPM Directors, champions, group leaders, and others with over 150 tools and templates that have been proven to increase client satisfaction and firm profitability.

Each license also includes consulting support and materials to help LPM leaders ensure that lawyers use these tools to improve profitability, realization, and client satisfaction.

“LPM is an ongoing and continual process of gradually modifying behavior... To create LPM acceptance in a law firm culture, you have to keep reinforcing it.” -- Michelle Weber, COO, Bilzin Sumberg

The digital fifth edition of our *Legal Project Management Quick Reference Guide* was created to support continuous behavior change by making it easy to provide the LPM tools lawyers need, precisely when they need them.

A complete list of the current tools and templates appears at the end of this document. They are delivered in both PDF and Word format so that they can be made available on your intranet, and, when necessary, customized to fit your firm’s or practice group’s needs. New tools and templates are added every June and December so that lawyers can easily keep up with developments in this rapidly changing field.

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.

## **The benefits of this online library include**

- LPM Directors, internal LPM champions, practice group leaders and others can provide lawyers with exactly the information they need to increase efficiency, exactly when they need it.
- Lawyers can directly access all the tools on your firm's intranet, so they can download the information they need from their laptop, tablet, or phone, whether they are in their office, in a hotel room, or on an airplane.
- Save time and increase results by building your LPM efforts on a foundation that has been developed and tested over several years.
- Easily keep up with the latest developments in this rapidly changing field, as new tools and templates are added to the library twice a year.
- Multiply the effects of your LPM initiatives by helping LPM Directors, practice group leaders and others provide more lawyers with more help more quickly.

These cutting-edge tools are an unmatched resource summarizing what's worked in implementing 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 tools and templates will help your firm increase value, client satisfaction, and firm profitability on both hourly and alternative fee arrangements.

## **Rapid return on investment**

As soon as just one lawyer who is responsible for a large engagement accesses the right information at the right moment, the return on investment can quickly exceed the license cost by:

- Increasing the accuracy of an initial fee estimate and the likelihood of payment in full by using the template "15 questions to ask clients to help define scope"
- Renegotiating a fixed fee by using the template "Prepare and negotiate for approval of a scope change"
- Using any of the more than 150 tools and templates in this electronic library to increase client satisfaction and/or firm profitability

## **Each license includes**

- Unlimited, non-exclusive rights to reproduce and adapt all of this content within your firm and with your clients for one year
- Separate files for each tool (in both Word and PDF format) so you can easily deliver just the information a particular lawyer needs in your preferred format, and so you can customize existing templates to meet your firm's needs.
- New tools and templates that will be released to license holders every June and December
- Consultation with the authors of these tools and templates to maximize the value to your firm, ensure quick wins, and establish a foundation for future success
- A suggested menu structure that can be adapted to your intranet
- Email templates for use by the managing partner or another senior partner announcing the availability of these tools and the benefits to the firm and to individual lawyers

- Twelve “LPM tips of the month” each year, for publication on your intranet, internal newsletters, or email to remind lawyers of the value of this resource

Since it is extremely difficult to convince lawyers to change their behavior, the tactics that work best will vary from firm-to-firm and even from group-to-group within a firm. Based on LegalBizDev’s experience using these templates with other firms, the authors of these tools will help you develop a well-defined program that fits your firm’s culture and resources. This will increase buy-in by helping to ensure that influential lawyers actually use the tools to increase efficiency, client satisfaction, and profitability at your firm.

Each license includes four hours of consulting support plus materials to help build a stronger culture of LPM within your firm, including:

- Specific tasks, objectives, and timelines for using these LPM tools and templates
- Systems to provide exactly the information lawyers need, precisely when they need it
- A list of the top ten tools that have proven most useful in implementing LPM, and the top ten tools that are most effective in introducing LPM concepts
- Guidelines for prioritizing which lawyers to focus on first when introducing the LPM tools
- Suggestions for working with LPM champions, practice group leaders, and LPM Directors
- Tips for designing an internal program to publicize successes, including sample “LPM Tips of the Month”
- Guidance on how to save time developing firm-specific processes and procedures by starting from our templates
- Suggestions on how to customize our tools for in-firm presentations and training

### **For more information about these LPM tools**

Four previous editions of these tools have been tested and refined in firms around the world that encompass over 100,000 lawyers. Additional details can be found on our web page (see <https://www.tinyurl.com/LPM-Tools>) including:

- The names of more than 30 contributing authors from small firms and large ones, including Baker McKenzie, Morgan Lewis, WilmerHale, Pepper Hamilton, and Bilzin Sumberg
- The names of 24 LPM experts who currently serve on the Board of Advisors for the 5<sup>th</sup> edition, including representatives from Seyfarth Shaw, Lathrop Gage, Baker Botts, Winston & Strawn, and K&L Gates
- Testimonials from 22 additional LPM experts at such firms as Perkins Coie, Jackson Lewis, Ballard Spahr, Orrick, and Saul Ewing

For more information, contact us today at [info@legalbizdev.com](mailto:info@legalbizdev.com) or 800-49-TRAIN.

## LPM tools and templates available as of December 2018

The 47 tools and templates that are new or updated in the digital 5<sup>th</sup> edition of the *Legal Project Management Quick Reference Guide* are shown **in bold and italics below**. The 110 templates that have also appeared in the 4<sup>th</sup> edition in book format are shown in standard font. Additional new tools and templates will be added to this library every June and December.

### Introduction

How to use this electronic library

***Eight key issues in LPM*** \*

***One minute self assessment: Do you need LPM?*** \*

***Option 1 to get started: Address an immediate challenge*** \*

***Option 2 to get started: Complete a self-assessment*** \*

***Option 3 to get started: Study basic LPM principles*** \*

Problems addressed by the eight issues

Key benefits of LPM

***Why is implementing LPM urgent?*** \*

Warning signs that you need LPM

***Business development and LPM*** \*

***LPM and your future*** \*

Litigation example: Four ways to improve LPM

Transactional example: How LPM improved our practice

Defining LPM

Alternative definitions of LPM

***How law departments define LPM*** \*

***Why the Agile approach is so valuable to lawyers*** \*

***How to apply Agile to LPM*** \*

LPM steps in the lifecycle of a legal project

Shortcuts: The top 10 best practices in LPM

***Maintain progress with a weekly LPM review*** \*

### Part 1: Set objectives and define scope

Checklist: Defining scope

Engagement letters and statements of work

How to write a statement of work

Litigation example: SOW for an early case assessment

Transactional example: SOW for internal foreign corrupt practices act

Transactional example: SOW for product distribution in Europe

Transactional example: SOW for an M&A matter

15 questions to ask clients to help define scope

Sample assumptions for defining scope

13 issues to consider for a value-fee engagement letter

When client goals are uncertain

## Part 2: Identify and schedule activities

Checklist: Scheduling activities

### ***24 benefits of matter planning \****

Matter planning templates

Litigation example: Matter planning template for early case assessment

Transactional example: IPO of a Subchapter S corporation

Work breakdown structures

Transactional example: Employment law task list for a pre-complaint demand

Transactional example: Work breakdown structure for a simple corporate purchase

Transactional example: Work breakdown structure for tracking a multi-state document review

About Gantt charts

The power of checklists

### ***Three steps to building and using an effective checklist \****

### ***Four types of checklists for lawyers and legal staff \****

Litigation example: Mass tort litigation checklist

Transactional example: Asset acquisition task checklist

### ***Transactional example: Process checklist for an estate planning signing meeting \****

Business process improvement

Litigation example: Process improvement in a mass tort practice

Litigation example: Commercial litigation process map

Transactional example: Process improvement to improve associate and paralegal time entries

LPM software

## Part 3: Assign tasks and manage the team

Checklist: Managing the team

How to improve the management of legal teams

16 ways to improve team performance

How to improve legal team meetings

Litigation example: Early case assessment

Transactional example: IPO of a Subchapter S corporation

### ***Task status review meeting \****

The benefits of delegation

Four steps to improved delegation

Delegation tips from a managing partner

Delegation checklist

How to solve delegation problems

What lawyers should not delegate

### ***How to effectively resolve priority conflicts \****

### ***How to improve feedback to team members \****

Personal time management

One managing partner's time management plan

### ***How to manage interruptions \****

24 Outlook features that can be used in LPM

***Using OneNote in knowledge management and LPM \****

Tracking progress with Agile (Kanban)  
Accelerating progress with Agile (Scrum)

***Case study: Applying Agile to LPM \****

Using outsourcing to reduce legal costs

**Part 4: Plan and manage the budget**

Checklist: Budgeting

Six steps to better budgets

Litigation example: Budget template

Litigation example: Early case assessment

***Litigation example: Detailed breakdown of IP litigation (District Court) \****

Transactional example: IPO of a Subchapter S corporation

Task code overview

Task code research: What works and what doesn't

***Standard (UTBMS) task codes \****

***Example: How clients are using task codes \****

Pricing

Tracking and controlling costs

Be cautious about sharing budgets

***How pricing can affect legal practice \****

**Part 5: Assess risks to the budget and schedule**

Checklist: Assessing budget risks

Project risk analysis template

Litigation example: Risk analysis for enforcing a non-compete

Transactional example: Risk analysis for IPO of a Subchapter S corporation

Transactional example: Risk analysis for a public M&A matter

Reducing malpractice insurance costs by managing risk

**Part 6: Manage quality**

Checklist: Managing quality

Defining and managing quality

**Part 7: Manage client communication and expectations**

Checklist: Communicating

RACI matrix

Litigation example: RACI matrix for a litigation

Communication plan

***Detailed communication plan \****

Transactional example: Improving communication on a small legal team

Transactional example: Communication plan for an IPO team

How clients define value

***Use active listening to define value for your clients \****

***53 additional questions to discuss value \****

51 practical ways for law firms to add value

Key questions project managers should ask

One-page monthly reports

Lessons learned reviews

How to deal with difficult clients and situations

Summary: The art of client communication

## Part 8: Negotiate changes of scope

Checklist: Negotiating changes in scope

Scope changes in litigation

Tracking out of scope work

Establishing a change control process

Negotiate approval for a scope change

## Part 9: How to implement LPM throughout a firm

***Why try to change lawyers' behavior? \****

***Lessons from other professions \****

***The challenge of changing behavior \****

***The top five ways to increase LPM success \****

Questions to ask lawyers before they begin LPM coaching

Strategies to create internal champions

***How to accelerate LPM progress with a panel discussion by LPM champions \****

Strategies to change law firm culture

Overcoming resistance to LPM

The evolving role of LPM directors

***How to hire LPM staff \****

Measuring the impact of LPM

***What are law firms doing to increase efficiency? \****

***How to set LPM priorities and policies \****

How to sustain LPM progress

***Summary: The top three facts law firm leaders need to know \****

## Appendix A: Developing new business with LPM and AFAs

***LPM and business development \****

AFAs: The big picture

***Litigation AFAs: Questions every lawyer should ask \****

***Litigation AFAs: Questions every client should ask \****

***Litigation AFAs: Questions outside lawyers should ask \****

***Litigation AFAs: Questions firm management should ask \****

*Litigation AFAs: Questions every AFA should answer \**

*Litigation AFAs: Questions for AFAs with joint representation \**

AFA approval steps

How to evaluate whether to compete for a new matter

50 tips to win RFPs

## Appendix B: Extending your knowledge

Self-study basic questions

*Self-study additional readings \**

*Self-study advanced questions \**

The Certified Legal Project Manager® program

## Appendix C: Blank template forms

Matter planning template 1

Matter planning template 2 (including tracking)

Project risk analysis template

Communication plan

RACI matrix

Action items template

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