

LPM Role:

What Lawyers Should Not Delegate

Editor's Note: This article was adapted from the fourth edition of the Legal Project Management Quick Reference Guide. For more information, see <http://tinyurl.com/LPMbook> or call 800-49-TRAIN.

As legal project management (LPM) has grown and many firms have added staff to assist in pricing and project management, questions have arisen regarding the role that lawyers must play in project management versus what can and should be done by supporting staff.

The answers will vary from firm to firm and, in some cases, details will be controversial. However, we believe that at the heart of LPM there are a few core issues that lawyers must handle for themselves. If you need to exercise, you can't hire someone to do your pushups. Likewise, if you need to communicate better with your clients, you need to pick up the phone yourself.

In our research for *Client Value and Law Firm Profitability*, we asked AmLaw 200 leaders, "Which of the eight LPM issues do you consider most critical for client value and/or profitability in the short-term and why?" The answers appear in the table below. (Jim Hassett, *Client Value and Law Firm Profitability*, LegalBizDev, 2014).

Most critical short-term issues in LPM	
Set objectives and define scope	50%
Manage client communications and expectations	38%
Plan and manage the budget	28%
Assign tasks and manage the team	22%
Negotiate changes of scope	20%
Identify and schedule activities	12%
Assess risks to the budget and schedule	10%
Manage quality	10%

Proper Venue

In our opinion, the top two—defining scope and communicating—will always be the responsibility of relationship partners and should not be delegated. More generally, one could subdivide LPM tasks into two large categories:

1. Budget and schedule management
2. Client and team management

The first is where staff and software can help the most, depending on the skills, interests, and business model of each firm. The larger the matter or the firm, the more sense it makes to delegate budget and schedule management. However, no matter how large the firm, client and team management must largely be performed by the lawyers themselves.

Superfluous Perfectionism

In this nondelegable category, communication must begin at the start of every matter by defining scope clearly and understanding what clients want to pay for and what they do not. As one participant in our research put it: We need to get better at focusing on what we need to do to meet the clients' business objectives, not what we need to do to make ourselves feel good that we've just produced the greatest brief in the history of law. That is a monster hurdle to get over with successful lawyers at a top firm. That's been a major problem. It's about how you get people more focused on meeting business objectives and less focused on the pure intellectual, "I just want to spend all day and all night doing this, because I'm interested."

When it comes to team management, project management staff can and should help

with setting up plans, but how many project managers will be in a position to tell senior partners what they can and cannot do? To increase efficiency, somebody needs to be in charge. Here's another example from our research:

Isn't it amazing that you could produce a world-class brief and, if it's due at midnight tonight, you'll work right up till 11:55, and you will be ready to file this world-class brief, and everybody will be high-fiving. And if, at the last second, somehow there's an extension for two days, you will work the next two days to try and make what was perfectly good, if not great, even better. This is what lawyers do, and it sometimes has absolutely no value to the client, but that's what they do.

Many problems go back to the perfectionism that has caused so many legal budget overruns in the past. Said another research participant: I think one of the biggest problems in the industry is that we over-engineer and over-deliver quality when there's not enough discussion with clients up front about the cost trade-offs and what really needs to be done. One of the very first things I did when I left practicing law was that I agreed that, for every prospective securities offering

or document that I was going to read, I was not going to correct the typos. At the end of the day, most typos are not important. If a number was wrong, I might look at that one. We had a discussion the other day with somebody about what we could do for a certain cost, but only if they understand that they are not going to get a Cadillac. And so we too often think that we can only produce a Cadillac, and we don't have the discussion with the client about, is a basic car more than adequate for this, or is it worth the additional cost of building the Cadillac?

Overruling that perfectionism will require management techniques that are unfamiliar and uncomfortable to many lawyers, but they will be difficult or impossible to delegate. ■

—Jim Hassett

Jim Hassett founded LegalBizDev (www.legalbizdev.com) to help law firms increase client satisfaction and profitability by improving project management and business development. He has written 13 books, including the Legal Project Management Quick Reference Guide and the Legal Business Development Quick Reference Guide. Reach him at jhassett@legalbizdev.com or 800-49-TRAIN.