

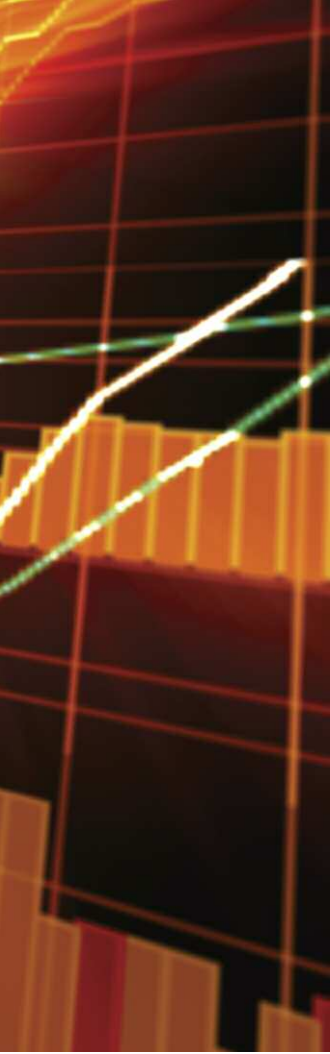
The background of the top half of the page is a complex financial chart. It features a grid with various data series: a candlestick chart at the top right with price points 38.11 and 39.06; a line chart with multiple colored lines (yellow, green, white) showing trends; and a bar chart at the bottom with red and orange bars. The x-axis is labeled with dates: Nov 9, 16, 23, Dec 7, 14, 21, 28, 2011, 11, 19, 25, Feb. The overall color scheme is warm, dominated by reds, oranges, and yellows.

## Implementing Legal Project Management:

# What's the Best Way to Grab the Flame?

*The rapid emergence of legal project management (LPM) as a powerful new source of energy in the legal profession resembles the discovery of fire. It's hot, it's new, and everyone is gathered around, trying to figure out how to put it to best use. Cautious types shrink from picking it up. But first-movers who dare to grab it and bend it to their will suddenly find themselves in positions of power at the head of the clan.*

By Pamela Woldow



**S**tripped to its essence, legal project management is a logical sequence of activities in which a law firm and its client collaborate to agree on goals, define the value of service, allocate resources, create a realistic and comprehensible budget and action plan, develop critical work paths and performance measures, try to anticipate and limit bad surprises, and employ transparent communication protocols.

We shouldn't oversimplify LPM, because managing complex legal projects demands equally sophisticated planning and execution. But in working with clients to implement LPM training, we do try to demystify LPM as much as we can. LPM's sheer novelty and its frequent association with quantitative, IT-driven industrial project management approaches tends to generate predictable resistance among lawyers. Effective LPM training programs must respect and address this resistance.

LPM is a discipline still in its infancy, and law firms are struggling with the challenge of how to introduce it, initiate it, implement it and develop it until it becomes an accepted part of the fabric of the firm.<sup>1</sup> As a basis for any law firm LPM training initiative, let me suggest a few pointers:

### **1. MAKE LPM AN EXERCISE IN LPM**

LPM can practice what it preaches. By that I mean, the basic LPM action sequence can and should be applied to the rollout of LPM itself and to the design of LPM training initiatives. LPM calls on all stakeholders to collaborate to:

- A.** scope the project;
- B.** allocate resources and identify constraints;

<sup>1</sup> \* Legal departments also wrestle with internal LPM-related implementation challenges, but the stakes are slightly different because in law firms, LPM has direct consequences for profitability. LPM holds enormous promise for cost centers (i.e., legal departments) as well, but implementing LPM in-house tends to be easier. Few legal departments are as large as major firms, with their hundreds of partners, associates and paralegals, so LPM implementers are not immediately faced with daunting challenges of scope and geography. This article will confine itself to law firm LPM implementation.

- C. plan the project thoroughly, carefully, and comprehensively;
- D. execute the plan;
- E. monitor progress objectively and dispassionately; and
- F. review and discuss lessons learned.

This last step is incredibly important. In large firms with many offices and hundreds of lawyers, there will be an understandable desire to cast all the LPM protocols in stone at the outset and then start the implementation machine rolling forevermore. But it's not enough that a lot of people receive training; given what the firm is promising clients about the benefits of LPM, it is imperative that lawyers and paralegals actually learn from the training.

So you must solicit participant feedback, ask for suggestions, swallow pride of authorship, and be willing to make mid-course corrections, even during Phase 1 rollout.

## **2. START SIMPLE**

Too frequently, experienced project management practitioners cross the line to become zealots, touting the myriad capabilities of fully mature, fully institutionalized LPM. This can really terrify the troops, or at least turn them off.

At the early stages of LPM implementation, don't tout it as a Swiss army knife that can do anything, if only you can get it to open. Just as your child's first car should be a Toyota and not a Ferrari, accept that initial LPM efforts must be at the level of "LPM 101": comprehensible, manageable, and built around core constructs to which greater sophistication can be added later.

## **3. BITE THE BULLET**

In large firms, LPM training can get expensive. In particular, the cost of designing reams of materials customized to different lawyer levels and conducting scores of focused workshops may make your eyes water. Why so many workshops? Why not a smaller number of mass presentations?

Our team's experience is that if LPM is ever to get beyond lip service in your firm, lawyers must dive in and get their hands dirty with numerous LPM activities in a highly interactive process keyed to real-life case studies — preferably ones designed around the firm's actual clients, practice and engagements. Workshops with more than about 25 participants miss out on that experiential learning, resulting in bored lawyers turning to their BlackBerries.

The process of gathering initial information, designing the program, and

customizing case studies requires time and expense. The good news is that these upfront design costs will be amortized as the firm's LPM training continues over time. True, total program costs correlate with the number of workshops. But the unit cost of each workshop drops dramatically once initial scoping and planning are done and LPM training enters the execution stage.

#### 4. CHOOSE A HORIZONTAL OR VERTICAL APPROACH

In our LPM design work, we often find ourselves at the heart of the “horizontal vs. vertical” debate. The “horizontal” perspective says you should train all the firm's lawyers at a certain level in an intensive series of workshops. This approach says, in effect: “In order to get full-immersion LPM exposure and teach large groups of lawyers the same precepts as quickly as possible, let's have workshops that include same-level lawyers from different practice areas.” This is the fastest way to build LPM momentum within a firm.<sup>2</sup>

Inherent in the horizontal approach is the need for layers of programs. Typically, we recommend training the partners first, because the “value proposition” is different: their programs go lighter on the “nuts and bolts” of daily matter management and heavier on teaching the powerful business development and client relations benefits that LPM confers. For lower-level lawyers and staff, our team will focus more on teaching practical tactics, tools and techniques to the people who will do the actual LPM heavy lifting day-to-day.

In contrast, the vertical approach trains members of particular client teams together. This “intact group” approach allows the people who work together daily not only to learn the mechanics of effective LPM, but also to develop the collaborative relationships and trust that really make LPM sing. Vertical LPM training is extremely interactive. Its costs may be higher, however, because a firm with many different client teams will require several customized workshops with attendant design demands.

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<sup>2</sup> A horizontal sub-category adds: “Let's bring all the practice group members together in their own workshops, so we can design bespoke case materials that will be realistic and useful to them.” This is an effective training approach, but it does require an extra increment of design time.

Different LPM training approaches are not mutually exclusive. One enlightened AmLaw 100 firm has planned an intensive hybrid Phase 1 program that includes awareness briefings, pilot programs, LPM 101 workshops, client team workshops, “train-the-trainer” sessions, and post-training coaching. At the end of Phase 1, the firm will know what works best for its lawyers, and Phase 2 will draw on those lessons.

Post-training coaching for participants often makes the difference between adoption of LPM and backsliding. The first few weeks after an initial LPM workshop are the most crucial in determining whether a lawyer will put LPM to use thereafter. Applying LPM to a real-life project is the best way to get lasting buy-in, and the availability of an LPM-trained coach to address practical application questions is invaluable at this point.

## **5. HOW LONG SHOULD A MAN'S LEGS BE?**

Long enough to reach the ground, said Abraham Lincoln. Similarly, the ideal workshop length is shaped by the tension between training effectiveness and the practical constraints of feasible attendance. It's just not reasonable to take large “horizontal” groups of timekeepers away from their desks for much more than half a day.

In the course of a full-spectrum LPM rollout, we often plan immersion at different depths; perhaps

- A.** a basic LPM Awareness Program to build buy-in with executive firm management (the “sniff test”);
- B.** a longer LPM Pilot Program for practice group leaders (the “tasting menu”);
- C.** a series of hands-on, case-study driven “LPM 101” programs for partners; and/or
- D.** longer “nuts-and-bolts” programs for vertical client teams or associates.

## **6. LET THE LAWYERS SPEAK**

LPM is not about manufacturing processes designed to punch out identical widgets; it's about giving lawyers better ways to do their jobs. Therefore, at the start of an LPM initiative, make lawyers your loudest LPM sponsors and its most visible teachers.

Be careful how you integrate your IT, financial, matter management,

performance management and professional development professionals into your training. Make no mistake: these experts are extraordinarily important contributors to making LPM really perform, and some firms already are developing remarkable budgeting, task-coding, and Gantt-charting tools. But many lawyers will head for the hills if they believe LPM is going to be “IT-centric,” “data-driven,” or even “process-based,” or if they think their training will be conducted by techies.

## 7. DENIAL IS NOT THE NAME OF A RIVER

From managing partners of smaller firms, I frequently hear something like: “This whole LPM thing is irrelevant, because our clients are content with hourly rates, and they’ve always been content with our service.”

Wrong. Whether they prefer time-based or value-based billing, all clients welcome efforts by their outside counsel to operate more efficiently, keep legal expenses tightly controlled, avoid unexpected surprises, and communicate more continuously and conscientiously.

I am a strong LPM adherent, because every day, I witness the legal profession through the eyes of the consumer: general counsel, chief legal officers, directors of litigation management, CFOs, and risk managers. And let me assure you, *they* are fast becoming LPM adherents.

These clients want to see legal representation that is both effective and efficient, and they will reward the firms that give it to them. They crave shared-power relationships rather than battles of bargaining leverage. They relish constant, open and collaborative communication. And they prefer not to delegate total control for their matters to outside counsel and then pray for the best.

So my best advice for firms that want to stay on top of clients’ hit parade? *Give them what they want.*



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