

Getting The Ducks In A Row

Project Management To Get It Done Right

It seems that while we were looking the other way, these past few decades, law and accounting firms have gotten more complex. In the old days, it was simple. A managing partner, an executive committee, and maybe a bookkeeper were all you needed to run a small or medium sized firm. As firms grew (see my new book, *Professional Services Marketing 3.0* <http://bit.ly/MarcusBook>, out late July 2011), the management needs grew more complex. Larger firms began hiring professional managers – MBA people, or, in some cases, the partner from the accounting firm who had worked with them. It made a difference.

But for the medium or smaller firm, the management problems proliferated beyond the ability of the existing staff or partnership to manage or cope. To put it bluntly, things that should have gotten done, didn't.

For these firms, the antidote to chaos, unnecessary expense, deteriorating client service, was a process widely used in many manufacturing processes called project management. It quickly became a process, offered by the larger consulting firms to those who could afford it, at great expense.

The medical profession has long understood the need for project management, in the form of lists. Checklists in medical practice, and especially surgery, were resisted at first (*"I don't need checklists to remind me not to leave gloves in the incision..."*), but relented after they discovered that by using them, deaths by surgical mistakes declined sharply and measurably.

Then came a firm called *LegalBizDev*, which developed a well-organized system that was not overly complicated, and that could be taught in seminar programs. Their

training manual for their training programs, written primarily by the consulting firm's CEO, Jim Hassett, PH.D, with the help and guidance of the firm's senior staff and an advisory board comprised of leading professional firm partners and consultants, is now available as a stand-alone manual. It's a beautiful and exceptionally helpful piece of work.

Written specifically for law firms, it will serve accounting firms as well.

While written as a reference manual as adjunct to training courses, it is still so well done, so easy to use, and so comprehensive as to stand alone as a guide to project management.

The early pages discuss the need for – and benefits of – legal project management. What's particularly striking is the first on the list is *Deliver greater value to clients*. This statement alone reflects the new understanding of client-oriented practice, or Professional Services Marketing 3.0, the subject and title of my forthcoming book.

Then comes Increased profitability, Reduce risk, Increased predictability of fees and costs, and six other benefits.

Subsequent chapter are each devoted to a step in the process, and each includes in great details the process for the chapter's subject. For example Chapter 2 describes eight key issues in legal project management. Chapter 3 discusses objectives -- how to define the scope, a checklist, how to write a statement of work, and examples. Chapter 4 is a meticulous discussion of how to identify and schedule activities. Other chapters cover assigning tasks and managing the teams, planning and managing budget, assessing risk, managing quality, communication, negotiating change orders, and action items.

Comprehensive appendices cover sample checklists, legal project management trends, *The Legal Project Management Quick Reference Guide* goes well beyond the author's exhortations not to read the Guide as a book, but rather as a reference

document. Read it from cover to cover, and then use it as a reference guide. It's remarkable in its grasp of the subject and its communication of techniques.

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