Fundamentals of Legal Project Management

Exclusively Designed for

ALA
Association of Legal Administrators

Capital Chapter

July 27, 2016
• **Passion**: Moving Organizations to Higher Performance

• **Firm**: C Parker Consulting, Inc. (Fredericksburg, Va)

• **Clients**: Government, Corporate, Nonprofits

• **Education**: MBA in organizational and human behavior

• **Certifications**: PMP, EQi, Belbin Team Roles

• **Memberships**: SHRM, AST, OD Network, COC

• **Hobbies**: Family, Travel, Leukemia/Lymphoma Society
8 Problems – SOLVED!

1. Unclear, expanding, or shifting objectives and scope
2. Lack of organization
3. Ineffective management of valuable personnel
4. Budget guesstimating
8 Problems – SOLVED!

1. Failure to prevent problems before they occur
2. Compromising quality
3. Excellent legal work that nevertheless fails to meet client expectations
4. Scope-creep
Learning Objectives

• Define what a project is and it isn’t
• Understand the 5 phases of a project's lifecycle
• Manage expectations and communicating with your “stakeholders”
• Juggling it all using a Project Management Plan
Definition of a Project

• Temporary
• Set Beginning and Ending Dates
• Creates a Unique Product, Service, or Result
• Done for a Purpose
• Has Interrelated Activities
• Is Progressively Elaborated
• NOT: operational or strategic planning
A Delicate Balance

SCOPE
QUALITY
SCHEDULE
BUDGET
RESOURCES
RISK
“When you fail to plan, you plan to fail”
The Legal Project Life Cycle

Figure 3-11. Process Groups Interact in a Project
Initiating

- Select Project Manager
- Recruit project team & identify stakeholders
- Collect info on culture, historical data, current processes
- Document requirements & scope
Listen to your Client!
Planning

• Hold project kick-off
• Draft Project Management Plan
• Develop task list and schedule
• Estimate resources
• Estimate time/cost/quality standards
• Anticipate risk
The processes required to ensure the timely completion of the project
The Work Breakdown Structure (WBS) is the *Foundation* for the Good Legal Project Management.

Hierarchical decomposition of the work to be executed in order to accomplish the project objectives and create the required deliverables.
Example: Work Breakdown Structure

WBS Example - Banquet

Level 1

1.0 Provide Banquet

Level 2

1.1 Plan and Supervise

1.1.1 Create Plan

1.1.2 Make Budget

1.1.3 Prepare Disbursements/Reconciliation

1.1.4 Coordinate Activities

1.2 Dinner

1.2.1 Make Menu

1.2.2 Create Shopping List

1.2.3 Shop

1.2.4 Cook

1.2.5 Serve Dinner

1.3 Room and Equipment

1.3.1 Identify Site/Room

1.3.2 Set up Tables/Chairs

1.3.3 Lay out Settings/Utensils

1.3.4 Decorate

1.3.5 Prepare Equipment, Pots, Etc.

1.4 Guests

1.4.1 Make Guest List

1.4.2 Receive RSVPs

1.4.3 Create Name Tags

1.4.4 Review Special Needs

1.5 Staff

1.5.1 Hire Shoppers

1.5.2 Hire Cooks

1.5.3 Hire Servers

1.5.4 Hire Hosts

1.5.5 Hire Cleanup

1.6 Speakers

1.6.1 Invite

1.6.2 Transport

1.6.3 Coordinate Topics

1.6.4 Backup for No-shows

1.6.5 Send Thank Yous
Focused. Intense. Urgent
1. Refine preliminary assessment of the merits of the matter
2. Confirm the proposed legal strategy
3. Identify the resources required from the firm, 3rd parties and the client
4. Assign roles and responsibilities
5. Create a detailed work plan
6. Formulate a timeline with milestones and dependencies
7. Elicit additional informational about stakeholders and client objectives
8. Articulate the clients’ definition of success
Project Management Plan

- Executive Summary
- Scope
- Schedule
- Budget
- Quality
- Human Resource
- Communications
- Risk
- Issues
- Procurement
Estimated Costs

• Develop budget based on estimates for tasks
• Negotiation and Value Based Fees
• Consider:
  • Hours
  • Rates
  • Expenses
  • Vendor
  • Time is currency!
  • Opportunity costs
  • IT
  • PM
Executing

- Manage the legal matter!
- Execute the Project Management Plan
- Implement approved changes
- Team building
- Hold facilitated, intentional progress meetings

Project Management Review is different than Substantive Review
Monitoring & Controlling

- Measure performance against Project Management Plan
- Determine variances/course correct
- Verify scope
- Manage change control
- Manage reserves
- Utilize issue logs
- Report performance on cost/schedule/quality and team members
- Ensure client satisfaction
COMMUNICATE!

Who are your stakeholders?

What do they need to know?

Have I told them?

What do they know that I need?

Have I asked them?

Tips & Tools:
- WBS
- Schedule
- Milestone Chart
- Status reports; dashboards
- Constant evaluation and anticipation
- Manage expectations
Planning for the Unexpected

• Build in flexibility
• Have a contingency plan
• Review and revise
• Evaluate planning strategies
• Communicate across business lines
Closing

- Develop close-out procedures
- Confirm work is completed to requirements
- Gain formal sign-off
- Index/archive records
- Document Lessons Learned/Best Practices
- Hand-off
- Celebrate/Acknowledge team
Lifecycle Activity

You will be assigned a phase.

In a small group, discuss the strengths and challenges you observe in your firm or corporate legal office for that phase.

Document the top 2 challenges and how they can be mitigated.
Summary of Phases
Let’s hear from an Expert

Pam Woldow from Edge International: Law Firm Strategy and Consulting

https://www.youtube.com/watch?v=eXWUFdfCQ4k
A Gift To You

1. Embrace it, lawyers know everything!

2. Encourage debate

3. Do 1 thing better – and ALWAYS the 1 thing better

4. Use your clients
Resources

- American Bar
- Association of Corporate Counsel
- The Business of Law
- C Parker Consulting, Inc.
- The Edge International
- Legal Biz Dev
- Legal Mosaic
- PMBOK – Version 5
- Project Management Institute