

What to Expect from LPM Coaching



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Executive summary

Two of the most effective ways to increase legal project management (LPM) results are to: (1) focus on changing behavior and solving problems; and (2) aim for quick wins to create internal champions. In over a decade of research and consulting with hundreds of law firms, we've seen that one-to-one LPM coaching is the most effective way to accomplish these goals.

This paper explains how our approach to LPM coaching works and what lawyers and other legal professionals can expect if they sign up. It also describes actual successes that typical participants have achieved.

The primary goal of our coaching program is to help legal professionals apply LPM immediately to find “low hanging fruit” and directly experience such immediate benefits as:

- Increasing realization and profitability
- Reducing risk
- Protecting current business
- Increasing new business

The best candidates for coaching tend to be those who are open-minded about change and efficiency, in a position to benefit when it works, and influential enough to quickly spread the word of their success.

During coaching, a certified NextGenLPM coach provides one-to-one advice on the best ways to apply LPM. This is done via email and scheduled phone calls spread over a period of up to four months. Each participant receives a copy our *Legal Project Management Quick Reference Guide* (4th Ed.),¹ which is a toolbox of LPM templates and best practices. The precise content covered and approach used is then customized to each participant's needs and personality.

Participants typically choose to work on an active matter during coaching, and their time may be billable, since they will be performing tasks required by the matter, just in a different, more efficient way.

Introduction

The five most effective ways to increase legal project management (LPM) results are to: (1) focus on changing behavior and solving problems, (2) aim for quick wins to create internal champions, (3) publicize successes within the firm, (4) use just-in-time training materials, and (5) take immediate action and follow up relentlessly.

¹ <http://www.nextgenlpm.com/wp-content/uploads/2020/07/PMG4-Order-Form-Px.pdf>

In over a decade of research and consulting with hundreds of law firms, we've seen that one-to-one LPM coaching is the most effective way to change behavior and achieve quick wins.

There are a number of ways that LPM coaching programs can be structured. Our own approach has evolved over the last ten years, as we found that some tactics worked better than others. This paper describes our approach and what legal professionals can expect if they participate in our program. It also describes some of the successes and achievements of our prior participants.

What is the goal of LPM coaching?

Project management has been used for decades in fields like engineering, construction, information technology, and aerospace. It is only in the last several years that lawyers have begun to apply these systematic and disciplined tactics to the unique challenges of the legal profession, and best practices have begun to emerge. A primary goal of LPM coaching is to help lawyers apply the latest findings about best practices, so they don't have to "reinvent the wheel."

From the start, the primary goal of our coaching program has been to help lawyers apply LPM immediately to find "low hanging fruit" and directly experience immediate benefits.

We have repeatedly seen that once lawyers achieve success, they become internal champions who help spread LPM best practices to others within their practice groups and throughout their firms.

How does our LPM coaching work?

LPM coaching is not a "one-size-fits-all" approach. What works best for one lawyer might not be best for another. Therefore, the precise content and approach of coaching is customized to each lawyer's needs and personality. But for every lawyer, each call with our LPM expert provides an opportunity to obtain advice about the best ways to apply LPM. And the very fact that a lawyer has a call scheduled with an LPM coach helps the lawyer stay accountable for action.

Our program typically includes 8 calls over four months. Most lawyers schedule a 30-minute phone call at the same time every other week, such as every other Tuesday at 10 AM.

Most lawyers begin the coaching process by selecting an active client matter, then identifying which of eight key LPM issues are most critical to meet their goals. Each participant receives a copy our *Legal Project Management Quick Reference Guide* (4th Ed.), which is a toolbox of templates and best practices.

During the coaching program, the LPM coach helps the lawyer quickly select the tools that are most likely to result in immediate benefits for their immediate situation. The lawyer also becomes aware of all the other LPM tools that may be helpful to them in the future, and when to use those tools.

A few lawyers prefer to start the coaching program by analyzing a past matter that went over budget to better understand how LPM could prevent that problem in the future. Some use the coaching program as a CLE-type course to understand the big picture of LPM. Although these theoretical approaches offer value, we prefer to engage lawyers in an active matter so that LPM is immediately real and relevant to their practice. But the bottom line is that our approach is entirely customized, and whatever works best for the lawyer works for us.

Is LPM coaching just for lawyers?

To maximize the benefits of LPM coaching, we believe it is best if lawyers participate in our LPM coaching program. However, we have coached paralegals, legal assistants, project management professionals, and LPM staff members with success. The reason we recommend coaching lawyers is obvious to anyone who has ever worked in a law firm: Lawyers are in charge, and if they don't buy into LPM, it simply will not be applied as effectively. We have found it can be unproductive and frustrating for a legal assistant to learn new LPM concepts, and then be limited in their ability to implement that new knowledge because they lack the authority to introduce important changes.

In addition, lawyers are the only ones who are appropriately positioned to manage certain aspects of LPM. For example, lawyers typically work with clients to set objectives and define scope and negotiate changes of scope. The same often holds true for such other LPM issues as managing client communication, assigning tasks, managing the team, assessing risks, and managing quality.

While many lawyers would prefer not to set aside time for coaching, as we often say, "You can't pay someone else to do your pushups." It is the *lawyer* who must learn LPM concepts if LPM is to be fully implemented in ongoing client matters.

How does a firm identify the best lawyers for LPM coaching?

We recommend starting with the motivated: lawyers who are open to new ideas and who have the most to gain. They could be key partners who are responsible for new alternative fee arrangements. Or they might be relationship partners who are worried about protecting business with clients who are looking for greater efficiency. Or maybe an entire practice group is considering new checklists, templates, and processes to improve its competitive position.

The exact individuals and groups will vary from firm to firm. But in every case, the best pilot group consists of those lawyers who are open-minded about change and efficiency, in a position to benefit when it works, and influential enough to quickly spread the word of their success.

Here are two questions you might consider asking prospective lawyers to determine the best possible candidates for LPM coaching:

1. Are you willing and able to commit one to two hours per week to participate in an LPM coaching program?
2. Are you willing to select an LPM best practice and work with an LPM coach to help you implement that best practice and change the way the legal matter is administered?

How much time does LPM coaching take?

The answer to this question depends upon the lawyer. Our program generally requires eight 30-minute calls over a period of four months. Most lawyers spend at least another hour or two after each call following up on their action items. *Note: If a lawyer chooses to work on an active matter, that time may be billable, since they will be performing tasks required by the matter, just in a different, more efficient way.*

Among other things, we ask lawyers to think about, and sometimes change, how they define objectives and determine the scope of a matter, how they plan matters to be more efficient, and how they organize their communications to better communicate with clients. The suggestions we make are based on best practices that other lawyers have used successfully.

The more time a lawyer dedicates to coaching, the more benefits they will see as a result.

What topics will be covered?

Again, the answer depends upon the lawyer. Our coaching is organized around eight key LPM issues (see the table on the next page). While many lawyers think of LPM as a way to organize schedules and budgets, our view is much broader. In a study of AmLaw 200 managing partners and law firm leaders,² we found that the two most important issues for most firms were improving how the scope of matters were defined and communicating better with clients. The amount of time a lawyer spends on an issue will be totally customized, so lawyers can focus on the issues that will have the greatest impact for their practice.

Is any preparation necessary before the first coaching call?

Before the first call, we provide each lawyer with a copy of the *Legal Project Management Quick Reference Guide* (4th Ed.). The only thing lawyers are required to do before the first call is to make sure they have their copy handy during the call. However, lawyers receive more benefit from the first call if they spend a little time thinking about the following two questions (which we ask on the call):

- What would have to happen for you to consider this coaching a success?
- What active client matter should you focus on first?

² <https://www.amazon.com/Client-Value-Law-Firm-Profitability/dp/0988657538>

After the lawyer considers these questions, we suggest that they take a little time to look through the table of contents of our book to see which tools and templates are most likely to help them. The table below provides examples of typical action items for each of the eight key LPM issues. The lawyer then works with their coach to identify LPM action items that will create “quick wins” – immediate benefits to the lawyer’s practice.

Legal project management issue	Typical action item	Benefit
1. Set objectives and define scope	Improve an engagement letter	Avoid misunderstandings
2. Identify and schedule activities	Create a matter plan listing all key tasks	Maximize efficiency and organization
3. Assign tasks and manage the team	Improve delegation	Better manage valuable time
4. Plan and manage the budget	Improve budgets, including tracking and controlling spending	Increase realization
5. Assess risks to the budget and schedule	Complete a risk analysis template for a new matter	Prevent problems before they occur
6. Manage quality	Develop a formal process to assure quality while improving efficiency	No compromises on work quality
7. Manage client communication and expectations	Improve communication with clients through monthly reports or weekly calls	Avoid surprises and increase client satisfaction
8. Negotiate changes of scope	When assumptions change, negotiate fee adjustments at an appropriate time	Protect profitability

What benefits should a lawyer expect from LPM coaching?

LPM coaching allows lawyers to efficiently review dozens of management tactics that have proven valuable for others, and coaching helps lawyers decide which LPM tactics will work best for them in their practice.

LPM was initially adopted by firms to protect profits in fixed-fee arrangements. But then firms saw the benefits of LPM in hourly rate matters, including increased client satisfaction and decreased write-offs, as well as more accurate budgeting and tracking. LPM has allowed firms to take on more work without adding headcount or cost. A survey by American Lawyer Media

Legal Intelligence³ found that firms that use legal project management report more productive client relationships, improved communication, greater cost predictability, and other benefits.

The table below describes some of the benefits that lawyers and law firms have achieved as a result of our one-to-one LPM coaching program.

LPM behavior change	Benefits
For every matter over \$50K, the lawyer shared a description of project scope and assumptions with everyone on the project team	Team members became more familiar with what each budget included and excluded, which improved cost predictability and client satisfaction
Required lawyers to use a special task code to identify any work that was performed despite the fact that it was technically beyond scope	Kept lawyers more aware of the scope of the agreement and enabled relationship partner to negotiate increased fee with the client, where appropriate
A lawyer established a procedure to provide written summaries of strategic objectives to clients for their review at the beginning of every new matter; this was later adopted by his entire firm	Improved client satisfaction and led to more accurate budgets and increased realization
At the start of a large matter, one lawyer used our matter planning template to create a list of key sub-tasks and assignments, then asked team members to estimate how many hours each sub-task would take	Team members completed most tasks within the time estimates they provided, which led to more accurate bids, increased realization, and new business
A litigator explained our risk analysis template to a key client and then used it to assess their budget in an early case assessment	The client loved the template and used it to structure their discussion of risks vs. costs. The result was increased client satisfaction and cost control.
The lawyer developed a new fixed fee product for consultations in a specialized area by working with a coach to identify all sub-tasks required and the range of possible time to complete each	Increased new business by offering a fixed price product in a specialized area before competitors did

³ <https://www.alm.com/intelligence/solutions-we-provide/business-of-law-solutions/surveys-rankings-and-reports/surveys-rankings-and-reports-list/legal-project-management-much-promises-many-hurdles/>

LPM behavior change	Benefits
One lawyer added a cover memo to monthly invoices with a bullet point summary of the progress of each matter on the invoice and the expected remaining costs	By explaining the rationale for each fee and what to expect, the lawyer avoided surprises and increased realization
A litigator developed a checklist of questions to ask at the beginning of each case to better define scope and assign lawyers to cases	More accurate bids, better team assignments, and lower costs to clients
A lawyer arranged to have the accounting department send “tickler” emails automatically when certain financial milestones were reached, such as when 50% of the budget was spent	Improved budget tracking led to cost control and avoided surprises to clients by enabling early discussions of possible scope changes
An IP lawyer used our matter planning template to simplify the steps required to complete patent applications for a key client. The lawyer identified 12 steps that were required for every patent application and a likely range of hours for completing each step.	Team members were able to easily compare their effort on each phase against expectations and increase efficiency. This improved client satisfaction and increased new business.
At the end of a matter, the relationship partner conducted a short “lessons learned” review with the client	The discussion led not only to ideas for increasing efficiency, but also to being assigned similar matters in the future
Senior partner who had to approve write downs identified a few key partners with high write-down rates and interviewed them about the causes and possible cures	Each lawyer developed a personal action plan to reduce write-downs, and the firm improved realization
A practice group required team leaders to hold weekly internal team status meetings for each matter over \$100,000	Avoided duplication of effort and led to early identification of issues that could increase scope

In today’s increasingly competitive environment, most lawyers can expect LPM to continue to change the way they practice law long after the coaching ends. In other words, lawyers should NOT expect to be finished with LPM when this brief program is completed. Our goal is to help lawyers get started on a long-term process that will continue to evolve and strengthen their competitive position for years to come.

About NextGenLPM

NextGenLPM is a boutique coaching and consulting company that helps law firms accelerate the implementation of legal project management to increase firm profitability and client satisfaction.

NextGenLPM licenses the use of its one-of-a kind Online LPM Library which is updated annually, and currently includes over 180 tools, templates, and best practices co-authored by more than three dozen experts from law firms around the world. We believe this is the single most valuable resource now available for firms that are truly serious about implementing LPM.

NextGenLPM also trains LPM staff to deliver our proprietary LPM coaching process that has been developed over thousands of hours, with dozens of law firms, over the past ten years. To learn more, visit our products and services page or contact us to discuss the best way to customize an LPM program to meet the unique needs of your firm.



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