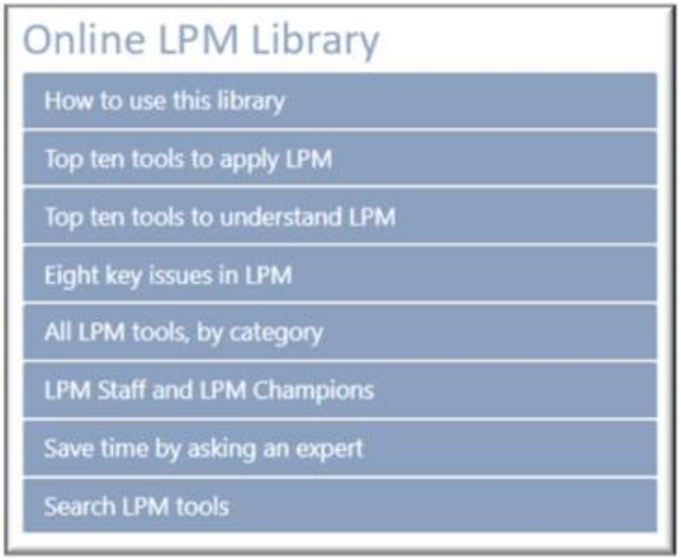
NextGenLPM
A Legal Project Management Company

ONLINE LPM LIBRARY



Our online LPM library allows firms to substantially accelerate LPM progress. This resource was created to support continuous behavior change by making it easy to provide the right LPM tools to lawyers, precisely when they need them. This online LPM library provides LPM Directors, champions, group leaders, and others with over 180 LPM tools that have been proven to increase client satisfaction and firm profitability.

Each license also includes consulting support and materials to help LPM leaders ensure that lawyers use these tools to improve profitability, realization, and client satisfaction.

> "LPM is an ongoing and continual process of gradually modifying behavior… To create LPM acceptance in a law firm culture, you have to keep reinforcing it." -- Michelle Weber, COO, Bilzin Sumberg

A complete list of the current tools and templates appears at the end of this document. They are delivered in both PDF and Word format so that they can be made available on your firm's intranet, and, when necessary, customized to fit your firm's or practice group's needs. New tools and templates are added every year so that lawyers can easily keep up with developments in this rapidly changing field.

In most professions, "just-in-time training" materials like these have become the standard way to teach new skills. For example, when people need to use an unfamiliar feature of Microsoft Word, very few would consider taking a class or looking it up in a book. Instead, they simply look up the information they need, when they need it. This product is the first and only set of "just-in-time" LPM tools currently available.

The benefits of this online library include

- LPM Directors, internal LPM champions, practice group leaders and others can provide lawyers with exactly the information they need to increase efficiency, exactly when they need it.
- Lawyers can directly access all the tools on their firm's intranet, so they can download the information they need from their laptop, tablet, or phone, whether they are in their office, at home, or anywhere else.
- Save time and increase results by building your LPM efforts on a foundation that has been developed and tested over several years.

- Easily keep up with the latest developments in this rapidly changing field, as new tools and templates are added to the library every year.
- Multiply the effects of your LPM initiatives by helping LPM Directors, practice group leaders and others provide more lawyers with more help more quickly.

These cutting-edge tools are an unmatched resource summarizing what's worked in implementing LPM at other firms, and what hasn't. Instead of paying to reinvent the wheel, firms can now start from a proven foundation that has helped thousands of lawyers. Whether it's planning a bid, defining scope for a new matter, improving client communication, or improving efficiency in other ways, this library of tools and templates will help your firm increase value, client satisfaction, and firm profitability on both hourly and alternative fee arrangements.

Rapid return on investment

As soon as just one lawyer who is responsible for a large engagement accesses the right information at the right moment, the return on investment can quickly exceed the license cost by:

- Increasing the accuracy of an initial fee estimate and the likelihood of payment in full by using the template "15 questions to ask clients to help define scope"
- Renegotiating a fixed fee by using the template "Prepare and negotiate for approval of a scope change"
- Using any of the more than 180 tools and templates in this electronic library to increase client satisfaction and firm profitability

Each license includes

- Unlimited, non-exclusive rights to reproduce and adapt all of this content within your firm and with your clients for one year
- Separate files for each tool (in both MS Word and PDF format) so you can easily deliver just the information lawyers need in their preferred format, and so you can customize existing templates to meet your firm's needs
- New tools and templates that will be released to license holders every year
- Consultation with the authors of these LPM tools to maximize the value to your firm, ensure quick wins, and establish a foundation for future success
- A suggested menu structure that can be adapted to your firm's intranet
- Email templates for use by the managing partner or another senior partner announcing the availability of these tools and the benefits to the firm and to individual lawyers
- Twelve "LPM tips of the month" each year, for publication on your intranet, internal newsletters, or email to remind lawyers of the value of this resource

Since it is extremely difficult to convince lawyers to change their behavior, the tactics that work best will vary from firm-to-firm and even from group-to-group within a firm. Based on our experience using these tools with other firms, the authors of these tools will help you develop a well-defined program that fits your firm's culture and resources. This will increase buy-in by helping to ensure that lawyers actually use the tools to increase efficiency, client satisfaction, and profitability at your firm.

Each license includes four hours of consulting support plus materials to help build a stronger culture of LPM within your firm, including:

- Specific tasks, objectives, and timelines for using these LPM tools
- Systems to provide exactly the information lawyers need, precisely when they need it
- A list of the top ten tools that have proven most useful in implementing LPM, and the top ten tools that are most effective in introducing LPM concepts
- Guidelines for prioritizing which lawyers to focus on first when introducing the LPM tools
- Suggestions for working with LPM champions, practice group leaders, and LPM Directors
- Tips for designing an internal program to publicize successes, including sample "LPM Tips of the Month"
- Guidance on how to save time developing firm-specific processes and procedures by starting from our templates
- A protocol and sample agenda for how to facilitate an LPM champions panel discussion within your firm
- Suggestions on how to customize our tools for in-firm presentations and training

More information about these LPM tools

- These LPM tools have been tested and refined in firms around the world with over 100,000 lawyers.
- The online LPM library has over 35 contributing authors from small firms and large ones including Baker McKenzie, Morgan Lewis, WilmerHale, Pepper Hamilton, and Bilzin Sumberg
- 22 LPM experts currently serve on our Board of Advisors including representatives from Lathrop Gage, Baker Botts, Winston & Strawn, and K&L Gates
- Several LPM experts have provided testimonials from such firms as Perkins Coie, Jackson Lewis, Ballard Spahr, Orrick, and Saul Ewing

For more information, contact us today at info@NextGenLPM.com or 800-49-TRAIN.

LPM tools currently available

The online LPM library current consists of 186 LPM tools which have been proven to increase profitability and client satisfaction. New tools are added each year.

Introduction

- How to use this electronic library
- Eight key issues in LPM
- One-minute self-assessment: Do you need LPM?
- Option 1 to get started: Address an immediate challenge
- Option 2 to get started: Complete a self-assessment
- Option 3 to get started: Study basic LPM principles
- Problems addressed by the eight issues
- Key benefits of LPM
- Why is implementing LPM urgent?
- Warning signs that you need LPM
- Business development and LPM
- How LPM can help reduce stress
- LPM and your future
- Litigation example: Four ways to improve LPM
- Transactional example: How LPM improved our practice
- Defining LPM
- Alternative definitions of LPM
- How law departments define LPM
- Law department goals for LPM
- Why the Agile approach is so valuable to lawyers
- How to apply Agile to LPM
- LPM and compliance with ethics rules
- LPM steps in the lifecycle of a legal project
- Shortcuts: The top 10 best practices in LPM
- Maintain progress with a weekly LPM review

Part 1: Set objectives and define scope

- Checklist: Defining scope
- Engagement letters and statements of work
- How to write a statement of work
- Litigation example: SOW for an early case assessment
- Transactional example: SOW for internal foreign corrupt practices act
- Transactional example: SOW for product distribution in Europe
- Transactional example: SOW for an M&A matter
- 15 questions to ask clients to help define scope
- Sample assumptions for defining scope
- 13 issues to consider for a value-fee engagement letter
- When client goals are uncertain
- Client intake: How to avoid problem clients

Part 2: Identify and schedule activities

- Checklist: Scheduling activities
- 24 benefits of matter planning
- Matter planning templates
- Litigation example: Matter planning template for early case assessment
- Transactional example: IPO of a Subchapter S corporation
- Work breakdown structures
- Transactional example: Employment law task list for a pre-complaint demand
- Transactional example: Work breakdown structure for a simple corporate purchase
- Transactional example: Work breakdown structure for tracking a multi-state document review
- About Gantt charts
- The power of checklists
- Three steps to building and using an effective checklist
- Four types of checklists for lawyers and legal staff
- Litigation example: Mass tort litigation checklist
- Transactional example: Asset acquisition task checklist
- Example: Step-by-step task checklist (estate administration)
- Transactional example: Process checklist for an estate planning signing meeting
- Example: Information gathering checklist (estate administration)
- Example: Issue spotting checklist (estate planning)
- Business process improvement
- Three tools for a firm-wide process improvement program
- Litigation example: Process improvement in a mass tort practice
- Litigation example: Commercial litigation process map
- Transactional example: Process improvement to improve associate and paralegal time entries
- LPM software

Part 3: Assign tasks and manage the team

- Checklist: Managing the team
- How to improve the management of legal teams
- 16 ways to improve team performance
- How to improve legal team meetings
- Six Steps to effective LPM brainstorming
- Litigation example: Early case assessment
- Transactional example: IPO of a Subchapter S corporation
- Task status review meeting
- Communicating the project timeline and budget
- The benefits of delegation
- Four steps to improved delegation
- Delegation tips from a managing partner
- Delegation checklist
- How to solve delegation problems
- What lawyers should not delegate
- How to effectively resolve priority conflicts
- How to improve feedback to team members
- Personal time management

- One managing partner’s time management plan
- Six ways to save time managing your email
- How to manage interruptions
- 24 Outlook features that can be used in LPM
- Using OneNote in knowledge management and LPM
- Tracking progress with Agile (Kanban)
- Accelerating progress with Agile (Scrum)
- Case study: Applying Agile to LPM
- Using outsourcing to reduce legal costs

Part 4: Plan and manage the budget

- Checklist: Budgeting
- Six steps to better budgets
- Litigation example: Budget template
- Litigation example: Early case assessment
- Litigation example: Detailed breakdown of IP litigation (District Court)
- Transactional example: IPO of a Subchapter S corporation
- Task code overview
- Task code research: What works and what doesn’t
- Standard (UTBMS) task codes
- Customized task codes
- LMSS: A new approach to task codes and more
- Example: How clients are using task codes
- Pricing
- Five ways to improve pricing
- Value pricing: What do clients want?
- Tracking and controlling costs
- Be cautious about sharing budgets
- How pricing can affect legal practice

Part 5: Assess risks to the budget and schedule

- Checklist: Assessing budget risks
- Project risk analysis template
- Litigation example: Risk analysis for enforcing a non-compete
- Transactional example: Risk analysis for IPO of a Subchapter S corporation
- Transactional example: Risk analysis for a public M&A matter
- Reducing malpractice insurance costs by managing risk

Part 6: Manage quality

- Checklist: Managing quality
- Defining and managing quality
- Using LPM to overcome perfectionism

Part 7: Manage client communication and expectations

- Checklist: Communicating
- RACI matrix
- Litigation example: RACI matrix for a litigation
- Communication plan
- Detailed communication plan
- Transactional example: Improving communication on a small legal team
- Transactional example: Communication plan for an IPO team
- How clients define value
- Use active listening to define value for your clients
- 53 additional questions to discuss value
- 51 practical ways for law firms to add value
- Eight tips to write more effective emails
- Key questions project managers should ask
- One-page monthly reports
- Lessons learned reviews
- Lessons learned review with internal team
- How to deal with difficult clients and situations
- Summary: The art of client communication

Part 8: Negotiate changes of scope

- Checklist: Negotiating changes in scope
- The problem of scope creep
- Scope changes in litigation
- Tracking out of scope work
- Establishing a change control process
- Negotiate approval for a scope change

Part 9: How to implement LPM throughout a firm

- Why try to change lawyers' behavior?
- Lessons from other professions
- The challenge of changing behavior
- The top five ways to increase LPM success
- Questions to ask lawyers before they begin LPM coaching
- Strategies to create internal champions
- How to accelerate LPM progress with a panel discussion by LPM champions
- Strategies to change law firm culture
- Overcoming resistance to LPM
- The evolving role of LPM directors
- How to hire LPM staff
- Measuring the impact of LPM
- What are law firms doing to increase efficiency?
- Stages of LPM competency
- How to set LPM priorities and policies
- How to sustain LPM progress
- Levels of LPM implementation

- Form: How our LPM team can help you
- Summary: The top three facts law firm leaders need to know

Appendix A: Developing new business with LPM and AFAs

- LPM and business development
- AFAs: The big picture
- Litigation AFAs: Questions every lawyer should ask
- Litigation AFAs: Questions every client should ask
- Litigation AFAs: Questions outside lawyers should ask
- Litigation AFAs: Questions firm management should ask
- Litigation AFAs: Questions every AFA should answer
- Litigation AFAs: Questions for AFAs with joint representation
- AFA approval steps
- AFA approval form
- How to evaluate whether to compete for a new matter
- 50 tips to win RFPs

Appendix B: Extending your knowledge

- Self-study basic questions
- Self-study additional readings
- Self-study advanced questions
- The Certified Legal Project Manager® program

Appendix C: Blank template forms

- Matter planning template 1
- Matter planning template 2 (including tracking)
- Project risk analysis template
- Communication plan
- RACI matrix
- Action items template

Appendix D: Legal Work from Home™ Series

- Work from home: Productivity checklist
- Work from home: Team communication checklist
- Work from home: Communicating with clients
- Work from home: Dealing with conflicting deadlines
- Work from home: Increase engagement of virtual teams

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