# Online LPM Library: Frequently Asked Questions (FAQs)

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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 LPM coaching is the most effective way to accomplish these goals.[1] To assist legal professionals in implementing LPM tactics, it is imperative that law firms have a proven and effective way to easily provide LPM resources to their lawyers and legal staff when they need them.

This paper explains how our online LPM library can help your firm implement a robust internal LPM coaching program, as well as what your firm can expect if it licenses this library.

The primary goal of any LPM coaching program is to help legal professionals apply LPM tactics quickly to find "low hanging fruit" and directly experience such immediate benefits as:

1) increasing realization and profitability
2) reducing risk
3) protecting current business; and
4) increasing new business.

A critical component of any LPM coaching program is to provide legal professionals with the resources they need "just-in-time" to help them resolve the real-world challenges they face on a daily basis.

In most professions, "just-in-time" training materials like ours 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 manual. Instead, they simply look it up online, exactly when they need it.

## Introduction

Although LPM coaching is the most effective way to change behavior and achieve quick wins, there are a variety of ways that LPM coaching programs have been structured internally at law firms. Regardless of the approach, it is essential that law firms have a proven set of LPM best practices to offer to their legal professionals.

Our online LPM library has been developed and refined in our one-to-one LPM coaching process over thousands of hours during the past decade. The online library provides LPM Directors, LPM coaches, champions, group leaders, and others with over 170 tools and templates that have been proven to increase client satisfaction and firm profitability. Each license also includes

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[1] Although we use the term "LPM coaching" in this article, it does not matter whether your firm adopts that terminology or not. For cultural reasons specific to your firm, it may be better NOT to refer to this process as "coaching." In any event, if your firm is serious about implementing LPM on a firmwide basis, it is critical to change the behaviors of your firm's legal professionals. Whatever you call it and however you do it, behavior change is paramount.

consulting support and supplemental materials to ensure that your firm's lawyers actually use the resource.

## Who should license the online LPM library?

Any law firm that is interested in changing the behavior of its legal professionals to implement LPM practices should consider licensing this library. It is absolutely critical for firms to have an online LPM resource if they want to provide "just-in-time" LPM training materials to lawyers and legal staff. A key question is whether firms want to "reinvent the wheel" and develop these materials on their own or license them.

To create a quality online LPM library takes thousands of hours of time over several years. It makes sense that firms would want to rely upon proven LPM best practices, and they would want to obtain the "know how" to promote and implement the library in a way that ensures it is actually used by firm lawyers.

Our cutting-edge tools are an unmatched resource summarizing what has worked at other firms. 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, our online LPM library will help your firm increase value, client satisfaction, and firm profitability on both hourly and alternative fee arrangements.

## What are the benefits of licensing the online LPM library?

Law firms have reported the following benefits as a result of licensing the online library:

- Internal LPM coaches, LPM champions, practice group leaders, and others provide lawyers with exactly the information they need to increase efficiency, exactly when they need it.
- Lawyers can directly access all the LPM tools on the firm's intranet, and can download the information from their laptop, tablet, or phone, whether they are in their office or at home or anywhere else.
- Firms save time and increase results by building their LPM efforts on a proven foundation that has been developed and tested over several years.
- Firms keep up with the latest developments in this rapidly changing field, as new tools and templates are added to the library each year.
- The library multiplies the effects of firm LPM initiatives by helping LPM Directors, practice group leaders, and others provide more lawyers with more help more quickly.
- LPM staff can quickly and easily develop educational LPM seminars and workshops based upon the materials.

- Firms improve client relationships by sharing LPM tools with key clients and working together with them to create additional value.
- LPM staff use the online library to create more awareness by sending LPM tips of the month to lawyers throughout the firm.
- LPM staff introduce key LPM concepts by demonstrating how to use the online library at practice group meetings, firm retreats, and in other settings.

## How much does it cost to license the online LPM library?

The answer to this question depends upon the number of lawyers at your firm and whether your firm is purchasing other services from us. If you want a free customized quote, please contact us at info@NextGenLPM.com.

What we can tell you is that this resource can offer a rapid return on investment. As soon as one lawyer who is responsible for a large engagement adopts an LPM best practice, the return on investment can quickly exceed the license cost by, for example:

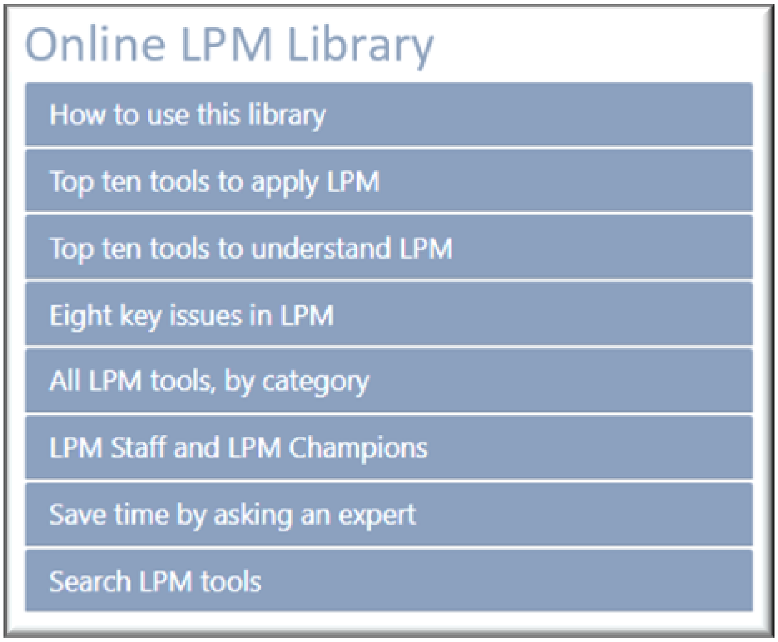
- Increasing the accuracy of an initial fee estimate and the likelihood of payment in full by using the template “15 questions to ask clients to help define scope”
- Renegotiating a fixed fee by using the template “Prepare and negotiate for approval of a scope change”
- Using any of the more than 170 tools and templates in this online library to increase client satisfaction and firm profitability

## What specifically does the license include?

Each license includes:

- Unlimited, non-exclusive rights to reproduce and adapt all of the content within your firm and with your clients for one year
- Separate files for each tool (in both Word and PDF format) so you can easily deliver just the information a lawyer needs in his or her preferred format, and customize existing templates to meet your firm’s needs
- New tools and templates that are released to license holders each year
- Consultation with the authors of the tools to maximize the value to your firm, ensure quick wins, and establish a foundation for future success
- Sample emails for use by the managing partner or another senior partner announcing the availability of these tools and their 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
- A proven method for hosting and facilitating a lawyer panel discussion to help promote the use of the online LPM resource among firm lawyers

- A suggested menu structure that can be adapted to your intranet (see screen shot below for an example of the “main menu”)




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 LPM 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 your lawyers use the tools to increase efficiency, client satisfaction, and profitability at your firm.

## Tell me more about the consultation that’s included with the license.

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 phases for using these LPM tools and templates
- 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 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 customizing our templates
- Suggestions on how to customize our tools for in-firm presentations and training

## What benefits should a law firm expect?

LPM was initially adopted by firms to protect profits in fixed-fee arrangements. But then firms saw its benefits in hourly rate matters, including increased client satisfaction and decreased write-offs, as well as more accurate budgeting and tracking. LPM has also allowed firms to take on more work without adding headcount or cost. A survey by American Lawyer Media Legal Intelligence[2] found that firms that use legal project management also report more productive client relationships, improved communication, greater cost predictability, and other benefits.

In today's increasingly competitive environment, most lawyers can expect LPM to continue to change the way they practice law. Our goal is to help lawyers design and implement long-term changes that will continue to evolve and strengthen their competitive position for years to come.

The table below lists specific examples of behavior change and associated benefits resulting from various coaching programs we have conducted over the past ten years.

| 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. |
| An LPM manager required lawyers to use a special task code to identify any work that was performed despite the fact that it was technically beyond scope. | This practice kept lawyers more aware of the scope of the agreement and enabled the relationship partner to negotiate increased fees 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 procedure was later adopted by his entire firm. | This procedure improved client satisfaction and led to more accurate budgets and increased realization. |

[2] 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 |
|---|---|
| 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 them. | 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. | New business increased, since the firm started offering a fixed price product in a specialized area before competitors did. |
| 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. | Using a checklist led to 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 to 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. |

| LPM behavior change | Benefits |
|---|---|
| A 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. | These meetings greatly helped avoid duplication of effort and led to early identification of issues that could increase scope. |

## What do clients say?

"Years ago, when I first read the *Legal Project Management Quick Reference Guide*, I was blown away by all the tools it included to implement LPM. When our firm bought a license to the online LPM library, it was even better because when a lawyer faces a challenge, we can easily send them exactly the tool they need, just when they need it. And new tools are added each year to keep up with the latest developments. I highly recommend the online LPM library to anyone who is involved in implementing LPM."

~ Paul Saunders, Practice Innovation Partner, Stewart McKelvey

"We created an LPM page on our intranet that is very slick and intuitive to use. Lawyers can see all the different tools and easily identify the ones they need and download them, anytime anywhere… This makes it very easy for us to provide each lawyer with the exact tool they need, whether it's for defining scope, planning a budget, improving client communication, or increasing efficiency some other way. This LPM home page, backed by over 170 templates, also gives us more presence and credibility within the firm."

~ Steve Flaks, Director of Pricing & Project Management, Saul Ewing Arnstein & Lehr LLP

## What are the contents of the online LPM library?

For a complete list of the LPM tools, please see Attachment A. All files are delivered in both Word and PDF format so 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 each year so your firm can easily keep up with developments in this rapidly changing field.

*(continued on next page)*

## What else can you tell me about the online LPM library?

- The content of the online LPM library has been tested and refined in law firms around the world that encompass over 100,000 lawyers.
- The online LPM library has over three dozen contributing authors from both large and small firms including Baker McKenzie, Morgan Lewis, WilmerHale, Pepper Hamilton, and Bilzin Sumberg
- We have over two dozen LPM experts who currently serve on our Board of Advisors including representatives from Norton Rose Fulbright, Lathrop GPM, Baker Botts, Winston & Strawn, and K&L Gates
- We have received testimonials from dozens of LPM experts at firms such as Perkins Coie, Jackson Lewis, Ballard Spahr, Orrick, and Saul Ewing

## How can we obtain more information?

Contact us at info@NextGenLPM.com or 800-49-TRAIN.

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# Attachment A: Complete list of Online LPM Library Tools

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

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