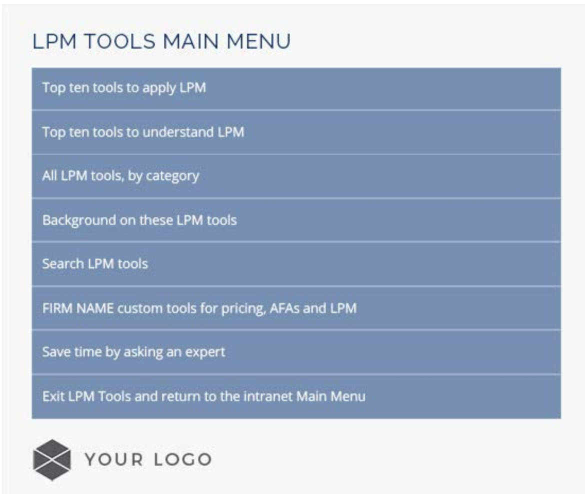
Legal Project Management Online Tools and Templates



Sample menu
Can be customized for your intranet

The electronic fifth edition of our *Legal Project Management Quick Reference Guide* enables firms to accelerate LPM progress by providing LPM Directors, champions and others with over 150 tools and templates which have been proven to increase client satisfaction and firm profitability.

Each license also includes consulting support and handouts to help LPM leaders determine the best way to assure that lawyers actually use these tools.

A complete list of the current tools and templates appears at the end of this document. They are delivered in both pdf and Word form. Relevant tools can be provided to lawyers as they need them, made available on your intranet, and/or customized. New tools and templates are added twice a 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” tools currently available in LPM.

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 your firm’s intranet, so they can download the information they need from their laptop, tablet, or phone, whether they are in your office, in a hotel room, or on an airplane.
- 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, with new tools and templates which are added to the library twice a 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 for 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 will 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 150 tools and templates in this electronic library to increase client satisfaction and/or 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 Word and pdf format) so you can easily deliver just the information a particular lawyer needs
- New tools and templates that will be released to license holders twice a year
- Consultation with the authors of these tools and templates 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 intranet
- Possible wording for an email from the managing partner or another senior partner announcing the availability of these tools and the benefits to the firm and 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 LegalBizDev's experience using these templates 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 influential lawyers actually use the tools to increase efficiency, client satisfaction, and profitability at your firm. Each license includes four hours of consulting support plus handouts for:

- Specific tasks, objectives, and timelines 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
- Prioritizing which lawyers to focus on first when introducing the tools
- Suggestions for working with LPM champions, practice group leaders, and LPM Directors
- Designing an internal program to publicize successes, including sample "LPM Tips of the Month"
- How to save time developing firm-specific processes and procedures by starting from our templates
- How to customize our tools for in-firm presentations and training

For more information about these LPM tools

Four previous editions of these tools have been tested and refined in firms with over 100,000 lawyers. Additional details can be found on our web page (see https://www.tinyurl.com/LPM-Tools) including:

- The names of 30 contributing authors from small firms and large ones, including Baker McKenzie, Morgan Lewis, WilmerHale, McDermott Will & Emery, and Bilzin Sumberg.
- The names of 24 LPM experts who currently serve on the Board of Advisors for the 5th edition, including representatives from Seyfarth Shaw, Lathrop Gage, Baker Botts, Winston & Strawn, and K&L Gates.
- Testimonials from 22 additional LPM experts at such firms as Perkins Coie, Jackson Lewis, Ballard Spahr, Orrick, and Saul Ewing.

Current users of these tools will discuss their experience at the P3 conference in Chicago in May 2018 in a panel entitled "*How LPM Directors Can Increase Their Impact with Just-In-Time Tools and Templates,*" led by LegalBizDev CEO Tim Batdorf.

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

LPM tools and templates available as of December 2017

** Tools and templates that are new in the fifth edition are shown in italics.*

Introduction

How to use this electronic library
*Eight key issues in 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
Litigation example: Four ways to improve LPM
Transactional example: How LPM improved our practice
How to define LPM
Alternative definitions of LPM
*Why the Agile approach is so valuable to lawyers **
*How to apply Agile to LPM **
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

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

Appendix A: Developing new business with LPM and AFAs

Appendix B: Extending your knowledge

Appendix C: Blank template forms

** Tools and templates that are new in the fifth edition are shown in italics.*

Additional new tools and templates will be added to this library every June and December.