

Online LPM Library of Tools and Templates: Frequently Asked Questions (FAQ)



*A LegalBizDev white paper
By Jim Hassett and Tim Batdorf
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www.legalbizdev.com
800-49-TRAIN

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 it.

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

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

As explained in our white paper, *The Keys to Legal Project Management Success*,² the five most effective ways to increase 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 action now and follow up relentlessly.

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 your firm calls it, and however your firm does it, behavior change is the key.

² <http://www.legalbizdev.com/files/The-Keys-to-LPM-Success-Dx.pdf>

Although LPM coaching is the most effective way to change lawyer behavior and achieve quick wins, there are a number of different ways that LPM coaching programs have been structured internally at law firms. (Not every firm follows our approach.) Regardless of the approach, however, it is essential that law firms have a proven set of LPM best practices to offer to their legal professionals. Our LPM tools and templates have been developed and refined in our one-to-one LPM coaching process over thousands of hours during the past decade. The online LPM 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 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 then 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 resource 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 library of tools and templates 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 lunch with a client.

- 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 twice a 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.
- 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 resource?

The answer to this question depends upon the number of lawyers at your firm. If you want a customized quote, please contact us at info@legalbizdev.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:

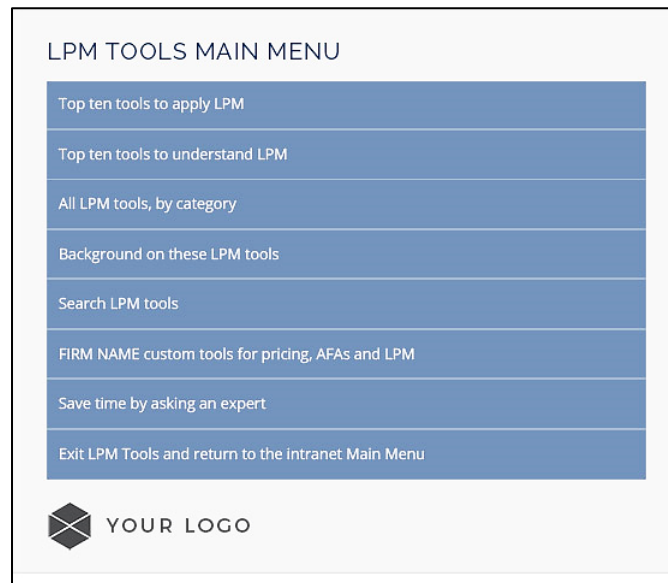
- Increasing the accuracy of an initial fee estimate and the likelihood of payment in full by using the template “15 questions to ask clients to help define scope”
- Renegotiating a fixed fee by using the template “Prepare and negotiate for approval of a scope change”
- Using any of the more than 170 tools and templates in this online library to increase client satisfaction and/or 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 particular lawyer needs in your preferred format, and so you can customize existing templates to meet your firm’s needs
- New tools and templates that are released to license holders every June and December
- 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

- 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 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 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 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

- 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 if it licenses this resource?

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 Intelligence³ 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.

A number of case studies⁴ can be found on our website that describe the results of lawyers who have used our LPM tools and templates. The table below lists specific examples from various coaching programs we have conducted.

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 fee with the client, where appropriate.

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/>

⁴ <http://www.legalbizdev.com/aboutus/case-studies.html>.

LPM behavior change	Benefits
<p>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.</p>	<p>This procedure improved client satisfaction and led to more accurate budgets and increased realization.</p>
<p>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.</p>	<p>Team members completed most tasks within the time estimates they provided, which led to more accurate bids, increased realization, and new business.</p>
<p>A litigator explained our risk analysis template to a key client and then used it to assess their budget in an early case assessment.</p>	<p>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.</p>
<p>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.</p>	<p>New business increased, since the firm started offering a fixed price product in a specialized area before competitors did.</p>
<p>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.</p>	<p>By explaining the rationale for each fee and what to expect, the lawyer avoided surprises and increased realization.</p>
<p>A litigator developed a checklist of questions to ask at the beginning of each case to better define scope and assign lawyers to cases.</p>	<p>Using a checklist led to more accurate bids, better team assignments, and lower costs to clients.</p>
<p>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.</p>	<p>Improved budget tracking led to cost control and avoided surprises to clients by enabling early discussions of possible scope changes.</p>
<p>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.</p>	<p>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.</p>

LPM behavior change	Benefits
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.
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 fifth edition, 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 twice a year to keep up with the latest developments. I highly recommend the online fifth edition of the *Legal Project Management Quick Reference Guide* 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?

A complete list of the current LPM tools and templates can be found on our website.⁵ When reviewing this list, please note that there are 66 new tools and templates that have been added to the online version of the *Legal Project Management Quick Reference Guide* and which are not available in the 4th edition of this resource. These new tools and templates are shown in bold and

⁵ <https://tinyurl.com/LPM-Online-Contents>.

italics on our website. (The 110 templates that appeared in the fourth edition of the book are shown in standard font.) All files are delivered in both Word and PDF 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 June and December so that lawyers can easily keep up with developments in this rapidly changing field.

What else can you tell me about this resource?

Four previous editions of these tools have been tested and refined in firms around the world that encompass over 100,000 lawyers. Additional details can be found on our website⁶ including:

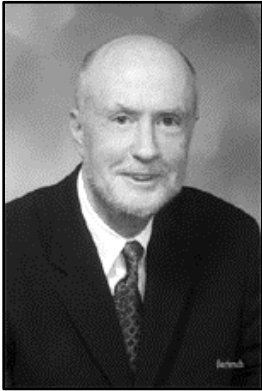
- The names of more than 35 contributing authors from both large and small firms, including Baker McKenzie, Morgan Lewis, WilmerHale, Pepper Hamilton, and Bilzin Sumberg
- The names of 25 LPM experts who currently serve on our Board of Advisors, including representatives from Norton Rose Fulbright, Lathrop Gage, Baker Botts, Winston & Strawn, and K&L Gates
- Testimonials from 22 additional LPM experts at firms such as Perkins Coie, Jackson Lewis, Ballard Spahr, Orrick, and Saul Ewing

How can we obtain more information?

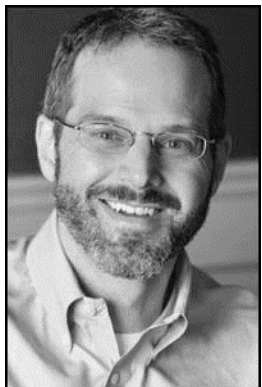
Contact us at info@legalbizdev.com or 800-49-TRAIN.

⁶ <https://www.tinyurl.com/LPM-Tools>

About the authors



Jim Hassett is the Chairman and founder of LegalBizDev, which helps law firms increase profitability by improving project management, business development, and alternative fees. Before he started working with lawyers, Jim had 20 years of experience as a sales trainer and consultant to companies from American Express to Zurich Financial Services. He is the author of 13 books, including the *Legal Project Management Quick Reference Guide*; *Legal Project Management, Pricing, and Alternative Fee Arrangements*; *Client Value and Law Firm Profitability*; and the *Legal Business Development Quick Reference Guide*. He has also published more than 80 articles in *The New York Times Magazine*; *Bloomberg Law*; *Of Counsel*; *Legal Management*; *Strategies: The Journal of Legal Marketing*; and other publications. Jim has spoken frequently at law firms and at bar associations (including the New York City Bar, the New York State Bar, and the Massachusetts Bar); at institutions such as Harvard Law School, the Association of Corporate Counsel, the Defense Research Institute, and the Ark Group; at the P3 conference; and at Legal Marketing Association meetings in Boston, New York, Philadelphia, Washington, Savannah, and Vancouver. He has conducted webinars through the Ark Group, West LegalEdcenter, the National Law Journal, The International Lawyers Network, TAG Academy, and the Legal Marketing Association. Jim writes the blog “Legal Business Development,” which was featured at the ABA TECHSHOW (in its list of “60 Sites: Latest and Greatest Internet Hits”) and by TechnoLawyer (in its list of “the most influential legal blogs” in BlawgWorld). He received his Ph.D. in psychology from Harvard University.



Tim Batdorf is LegalBizDev’s Chief Executive Officer and manages the day-to-day operations of all coaching and training programs. After earning his JD at DePaul University College of Law and an LLM in Taxation from the University of Miami School of Law, Tim worked for a prominent Michigan law firm and later formed a solo law practice. At LegalBizDev, Tim has been certified to coach lawyers in both legal project management and business development, and he has supervised numerous coaching programs conducted by other LegalBizDev coaches. Tim is a contributing author of the *Legal Project Management Quick Reference Guide*, and for the last several years he has worked closely with Jim Hassett to ensure the overall quality of LegalBizDev coaching programs and to develop new and innovative products and services.

About LegalBizDev

LegalBizDev helps law firms increase client satisfaction and profitability. We literally wrote the books that helped start the legal project management movement, and we are also widely recognized as leaders in legal business development.

While many competitors offer educational programs in these important areas, only LegalBizDev has developed proprietary processes to help lawyers change their behavior. LegalBizDev offers coaching, consulting, webinars, workshops, publications, just-in-time training tools, and more to help lawyers and law firms identify the action items that are most likely to produce immediate and practical results.

Through a strategic alliance with Altman Weil, we also offer clients a broad range of management consulting services in related areas, including strategic planning, practice group management, client surveys and custom benchmarking, lawyer compensation systems, marketing strategy, and much more.

LegalBizDev has developed and delivered award winning training since 1985. For more information, visit our web page at www.legalbizdev.com or contact us today to discuss the best way to meet your unique needs.



225 Franklin Street, 26th floor
Boston, MA 02110
800-49-TRAIN
www.legalbizdev.com
info@legalbizdev.com

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