

PM VS LPM PROJECT MODELING: DIFFERENCES, APPLICATIONS AND TEMPLATES

Panelists:

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Michael Clear

Joanna Pashos

Moderated by: Pat Mansuy

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#ILTACON






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session
notes!



LET'S SHARE - POLL!

Cnf1

Which firms have a formal PMO/LPM Department or people in these positions?

CHOICE	VOTES		
Yes, LPM	4	10%	
Yes, PMO	9	22%	
Both, LPM and PMO	3	7%	
No formal department, but people in roles	23	56%	
None	2	5%	

Slide 3

Cnf1

Poll: Which firms have a formal PMO/LPM Department or people in these positions?

Cnf, 8/31/2016



WHAT IS THE DIFFERENCE?

Project Management
(PM)



Legal Project
Management (LPM)

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WHAT IS PROJECT MANAGEMENT (PM)?

Project management is the application of processes, methods, knowledge, skills and experience to achieve a set of objectives. Each project is unique. This discipline uses proactive methods to manage time, cost and scope for desirable outcomes and benefits.

- Define the scope of engagement
 - Estimate project budget
 - Identify resources to assign to project
 - Schedule resources (SME's)
 - Identify budget risks and issues
 - Monitor task, scope, budget and resources through project close
- #ILTA100
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WHAT IS LEGAL PROJECT MANAGEMENT (LPM)?

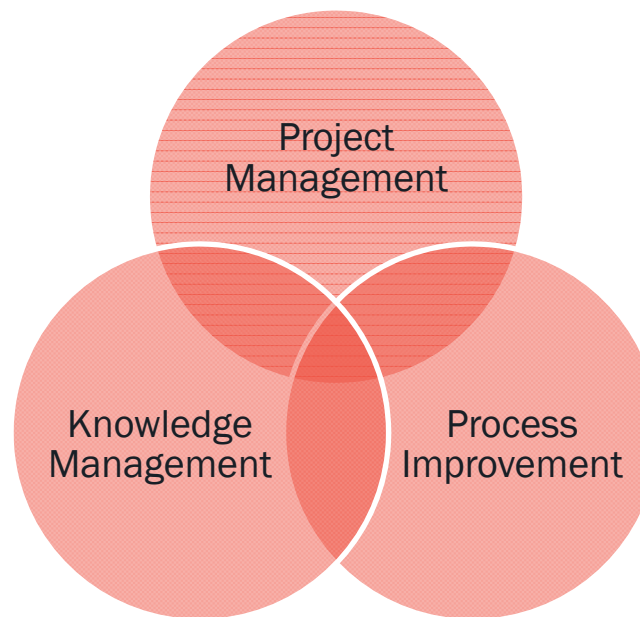
- A disciplined, proactive approach to managing law firms resources:
 - Define the scope of engagement
 - Estimate budget and client approval in the engagement letter
 - Identify resources to assign to client
 - Schedule resources (SME's)
 - Identify budget risks and issues
 - Monitor budget and resources through close of the deal to the end of the case.

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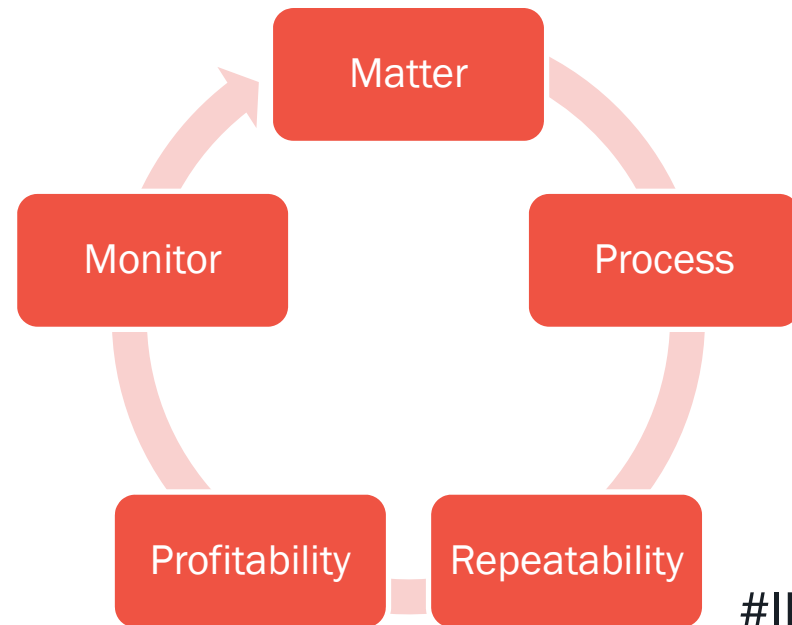
WHAT ABOUT THOSE CONCEPTS! GETTING BUY IN



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WHERE DO YOU START?

- Develop Awareness
 - identify, document, prioritize

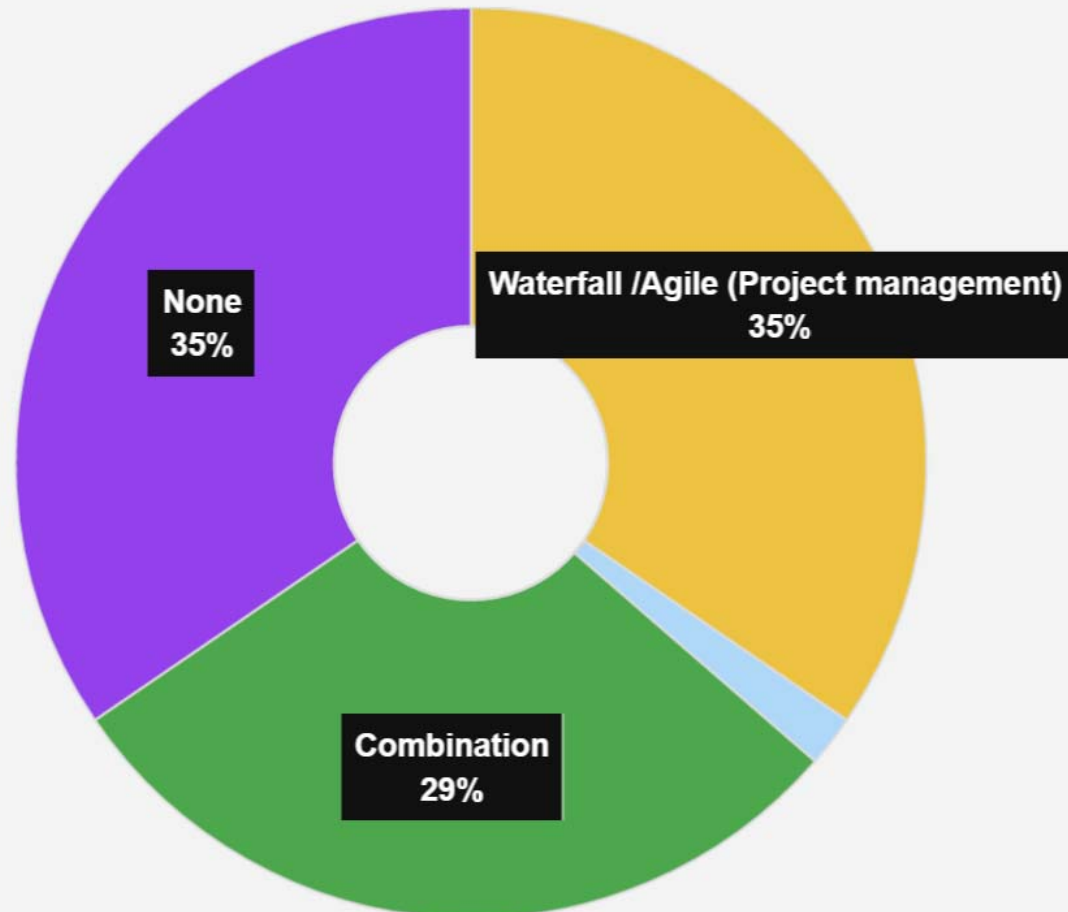


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LET'S SHARE - POLL!



What methodology and approaches have you used in your firm?



Slide 10

Cnf2

Poll: Poll 2: What methodology and approaches have you used in your firm?

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UNCOVER INEFFICIENCIES

Defects

- Mistakes, missing court and filing dates, incomplete forms or drafting, errors

Overproduction

- Including too many people, printing too many copies, preparing invoicing in advance, starting work on a matter before it's cleared

Waiting

- People late to meetings, documents waiting to be worked on, warm up time for printers, interruptions, late responses from clients

Non-utilized Talent

- Extra counsel completing work that is best done by a client, work being done by partners rather than associates or paralegals, under utilizing paralegals

Transportation (of things)

- Too many approval hand-offs, multiple deliveries to one client, paper rather than electronic

Inventory

- Unanswered emails & voicemails, files sitting on desk awaiting work, conflicts awaiting clearance

Motion (of people)

- Bad office layouts, Unnecessary travel for meetings, too many keystrokes in document production, too many trips to a printer/copies

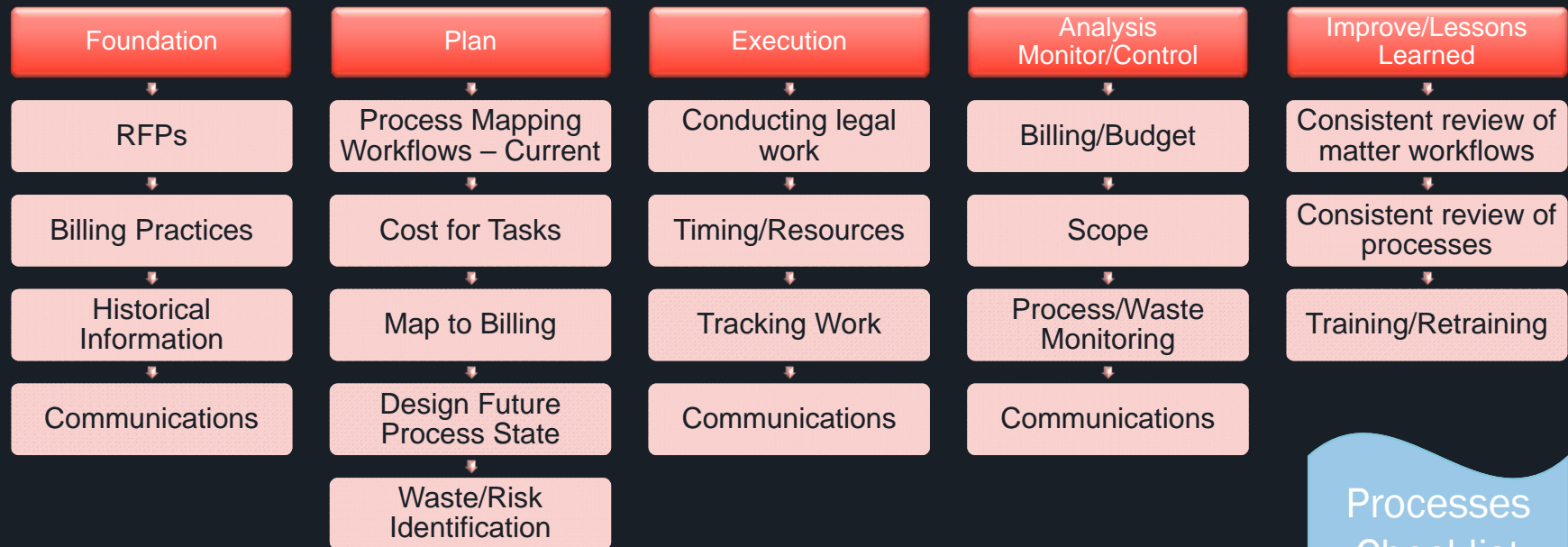
Extra Processing

- Too much research, overstaffing a file, too many reviews/turns of a document

Waste
Checklist



LPM PHASES IN PRACTICE



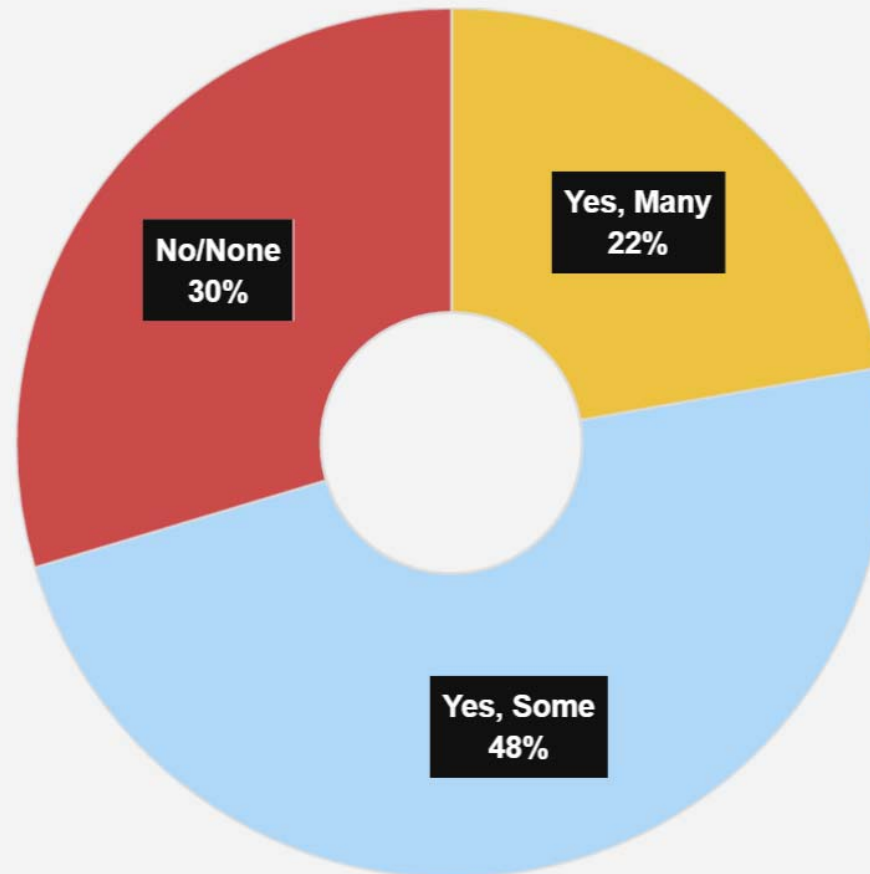
#ILTA100
#ILTACON



LET'S SHARE - POLL!



Does your firm have processes documented?



Slide 14

Cnf3

Poll: Poll 3: Does your firm have processes documented?

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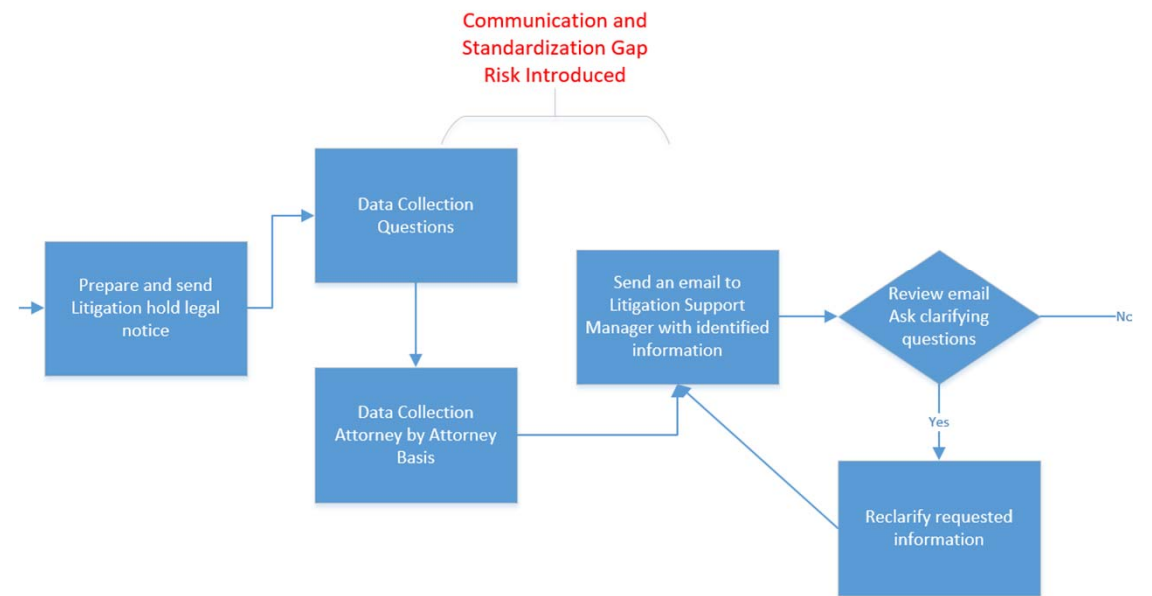
ESTABLISH NEXT PRACTICES

- Developing next practices
 - Document, document, document

PRE-DRAFTING REVIEW CHECKLIST	
Task	
▪ Review Memo & Note Deadline (24 Hrs)	
▪ Review Filesite Matter	
▪ <i>Check Web for Information (Optional)</i>	
▪ Ask for Clarification	
▪ Find & Add Model Forms to Filesite	
▪ Identify Names and Key Players	
▪ Start Punch List	
▪ Assign Drafting of HCD's	
▪ Prepare for Drafting	

Process
Checklist

WORKFLOW DOCUMENTED





ACE Dashboard

WIGGIN AND DANA

Search Tasks...

+ Quick Add

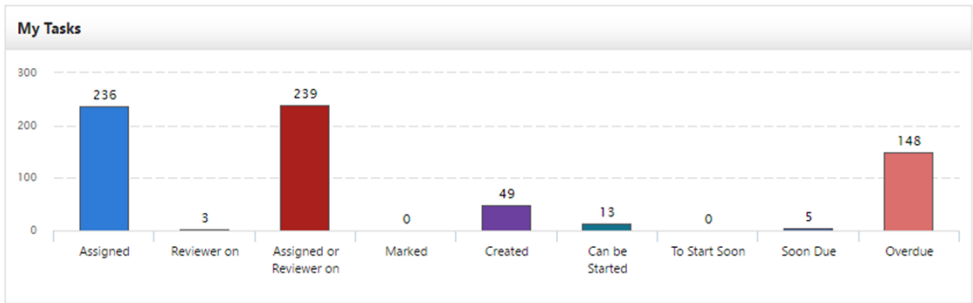
Michael Clear

- Dashboard
- Tasks
- Documents
- Projects
- More



Home > Dashboard

Add a task to this project... Add a Project Add a User



My Projects

Assigned	291
Marked	0

Marked Custom Reports

--	--

Videos

Getting Started

- Overview
- Product Tour
- Time
- Add a User

All Videos

Latest News

- Oct 2015
- June 2015
- April 2015
- Feb 2015

Help and Support

- Guider
- Blog
- Help
- Live Chat!



ACE Open Projects

WIGGIN AND DANA

Search Tasks...

Quick Add

Michael Clear

Home > Projects (389)

Add a Project

Custom View

	Number	Name	Project Type	Status	Assigned	Priority
<input type="checkbox"/>	0000021	*Ace Project - Help/User Guide/Live Chats	Other	Assigned		Normal
<input type="checkbox"/>	0000751	*Crummey Notice Reminders - Recurring	T&E - Misc.	Assigned		Normal
<input type="checkbox"/>	0000501	*Gift Tax Returns - 2015	Other	On-Going		Normal
<input type="checkbox"/>	0000705	*Gift Tax Returns - Recurring	T&E - Misc.	Assigned		Normal
<input type="checkbox"/>	0000581	*GRAT Annuity Payments	T&E - Misc.	Assigned		Normal
<input type="checkbox"/>	0000749	*Life Insurance Premium Payments - Recurring	T&E - Misc.	Assigned		Normal
<input type="checkbox"/>	0000497	*PCS - DLD Projects	T&E - Misc.	Assigned		Normal
<input type="checkbox"/>	0000094	*PCS - General Projects	T&E - Misc.	On-Going	CHoltz, DDaniels, DKesner, DMaloney, JBeards, KClute, LPage, MClear, OLDCHoltz, RAneshian, TMetron	Normal

Page 1 of 4 100 per page

Select the items you wish to apply an action to.

Hide Filters

All Incomplete Statuses

Assigned: All Assigned Us...

All Project Types

All Project Priorities

All Clients

Date Range

Marked Projects Only

Include Static Templates

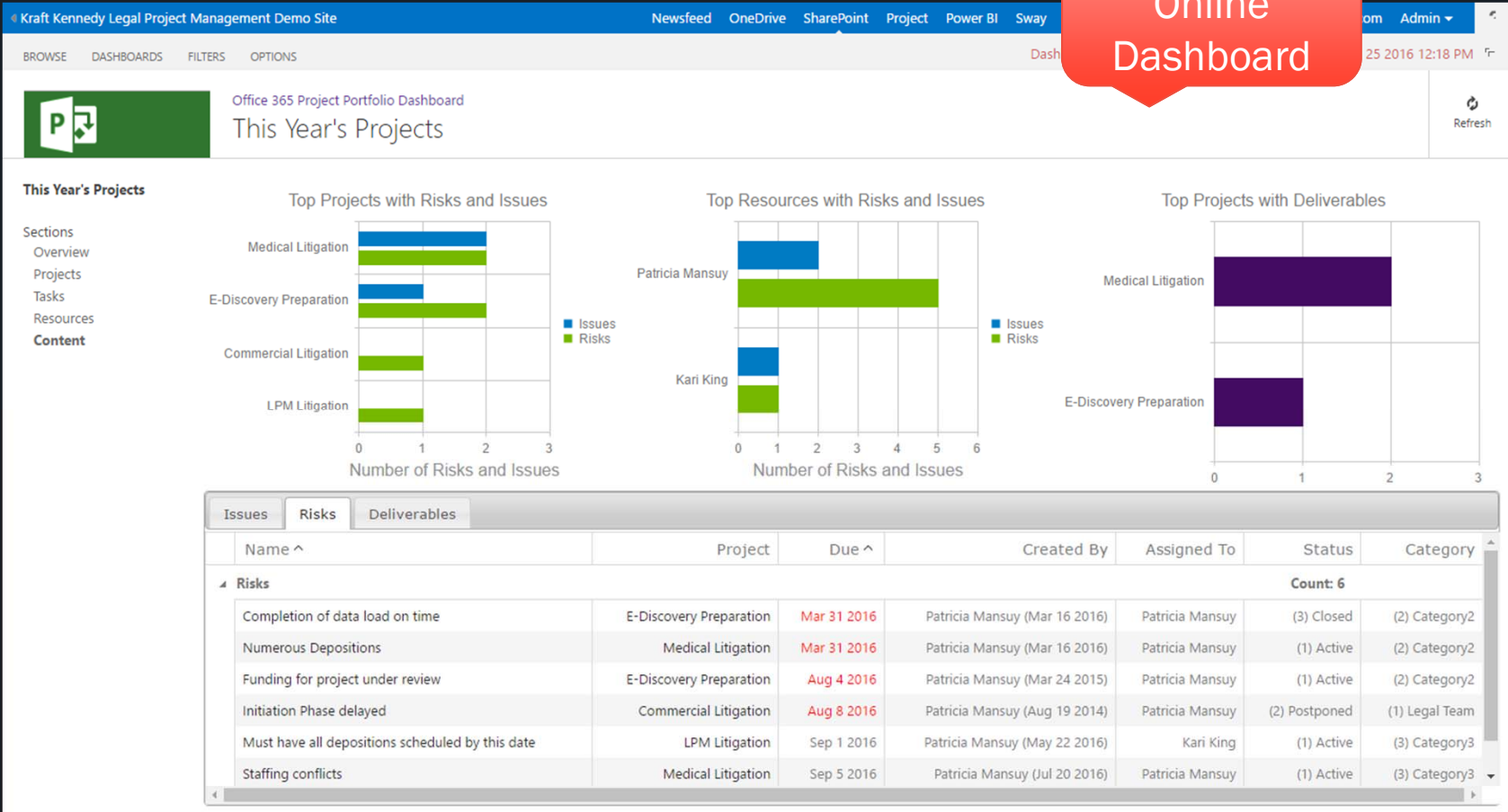
Text to Search...

Apply Filter

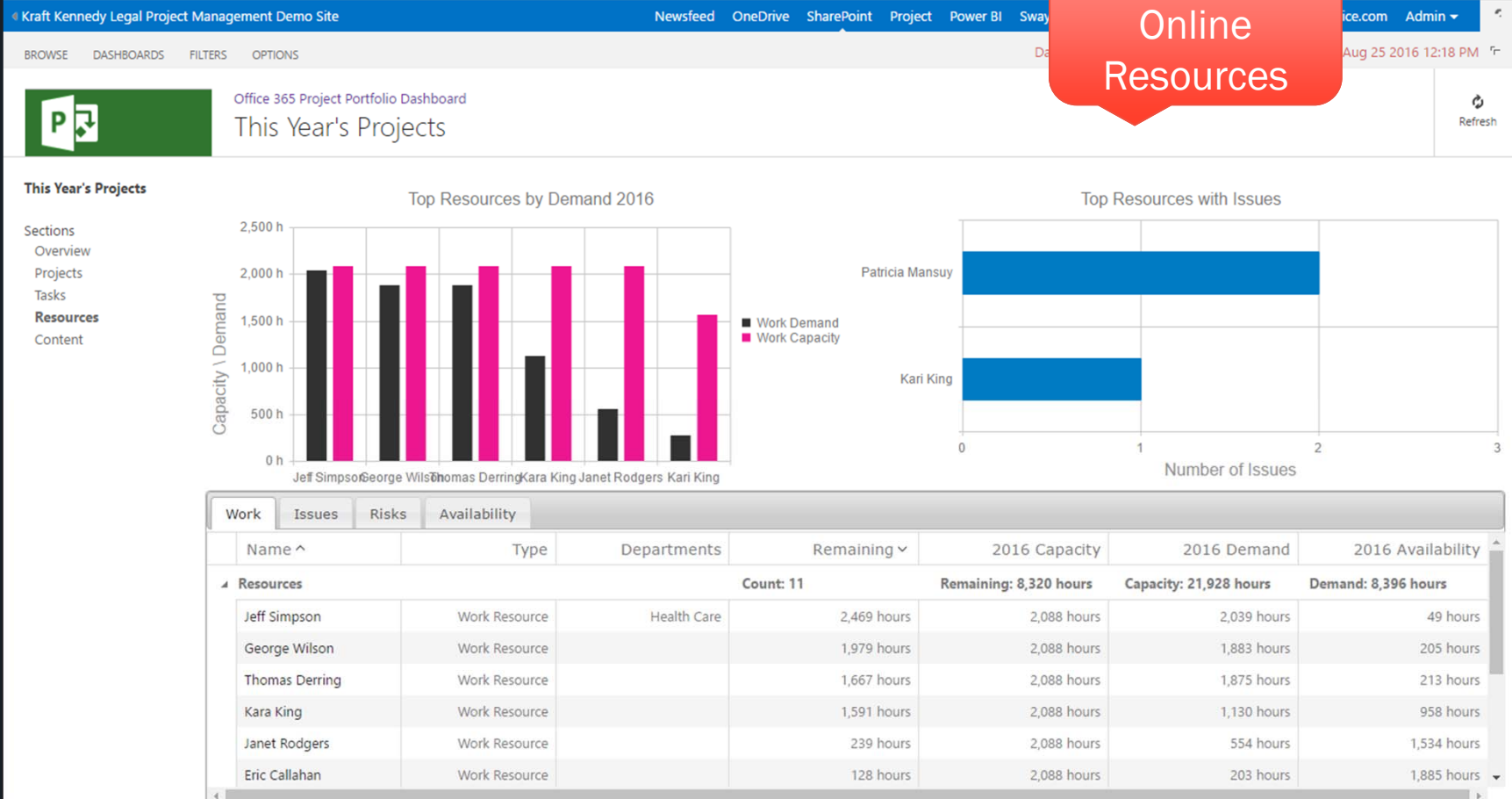
Remember | Reset



MS Project Online Dashboard



MS Project Online Resources



MS Project Online Variance



Kraft Kennedy Legal Project Management Demo Site

Newsfeed OneDrive SharePoint Project Power BI Sway

.com Admin

BROWSE DASHBOARDS FILTERS OPTIONS

Dashboard g 25 2016 12:18 PM Refresh



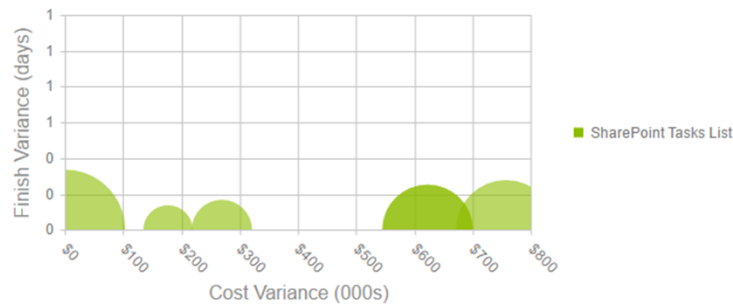
Office 365 Project Portfolio Dashboard

This Year's Projects

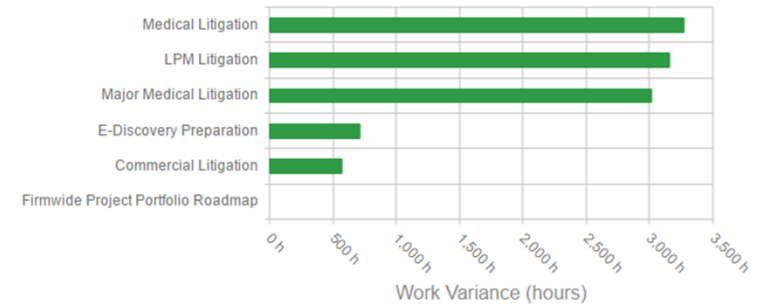
This Year's Projects

- Sections
- Overview
- Projects**
- Tasks
- Resources
- Content

Top Projects with Finish and Cost Variance



Top Projects by Work Variance



Finish Variance	Cost Variance	Work Variance				
Name ^	% Complete	Owner	Baseline	Finish	Variance	
Projects			Count: 6		Variance: 0.00 days	
Commercial Litigation	69 %	Patricia Mansuy	Aug 24 2016	Aug 24 2016	0 days	
E-Discovery Preparation	50 %	Patricia Mansuy	Sep 20 2016	Sep 20 2016	0 days	
Firmwide Project Portfolio Roadmap	32 %	Patricia Mansuy	Feb 6 2017	Feb 6 2017	0 days	
LPM Litigation	63 %	Patricia Mansuy	Mar 5 2019	Mar 5 2019	0 days	
Major Medical Litigation	0 %	Patricia Mansuy	Dec 14 2017	Dec 14 2017	0 days	
Medical Litigation	61 %	Patricia Mansuy	Dec 6 2016	Dec 6 2016	0 days	



MS Project Professional Template

	% Comp	Task Name	Work	Duration	Resource Names	Cost	Task Code
0	100%	Legal Process Management Practice Template	44.35 hrs	27.25 days		\$18,449.50	
1	100%	1 Phase 1: Client Intake	3.25 hrs	4.75 days		\$746.25	
2	100%	1.1 Determine new client vs existing client	0.25 hrs	0.25 days	Legal Assistant[13%]	\$21.25	e100
3	100%	1.2 Conflicts check	0.5 hrs	0.5 days		\$42.50	
5	100%	1.3 Information Gathering with Clients	1 hr	2 days		\$0.00	
7	100%	1.4 Prepare and send EL	1 hr	1 day	Legal Assistant[6%],Partner[6%]	\$362.50	e100
8	100%	1.5 Review EL	0.5 hrs	1 day	Partner[6%]	\$320.00	e100
9	100%	1.6 Phase 1: Client Intake complete	0 hrs	0 days		\$0.00	
10	100%	2 Phase 2: Pre-Drafting - Associate or Paralegal	5.5 hrs	8.5 days		\$2,825.00	
11	100%	2.1 Assignment	2 hrs	2 days		\$1,180.00	e200
16	100%	2.2 Pre-Drafting	3.5 hrs	6.5 days		\$1,645.00	e200

MATTER BUDGETS/ PROJECT BUDGETS

- History tells the truth of what's happening
- Involve accounting, look at the data
- Leverage = Profitability





MS Project Professional Budget Report

COST OVERVIEW

WED 7/1/15 - FRI 11/11/16

COST

\$311,322.43

REMAINING COST

\$206,602.05

% COMPLETE

11%

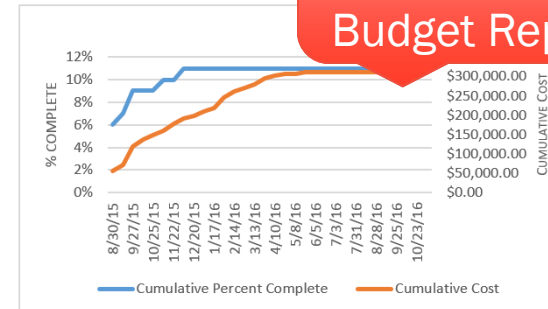
COST STATUS

Cost status for top level tasks.

Name	Actual Cost	Remaining Cost	Baseline Cost	Cost	Cost Variance
Initiation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Planning and Design [Phase COMPLETE]	\$40,920.00	\$0.00	\$40,920.00	\$40,920.00	\$0.00
Execution	\$44,636.67	\$85,318.33	\$127,773.33	\$129,955.00	\$2,181.67
Monitor and Control - Program Management - Natalie/Todd	\$19,163.71	\$117,843.71	\$135,074.00	\$137,007.43	\$1,933.43
Close Out	\$0.00	\$3,440.00	\$3,360.00	\$3,440.00	\$80.00

PROGRESS VERSUS COST

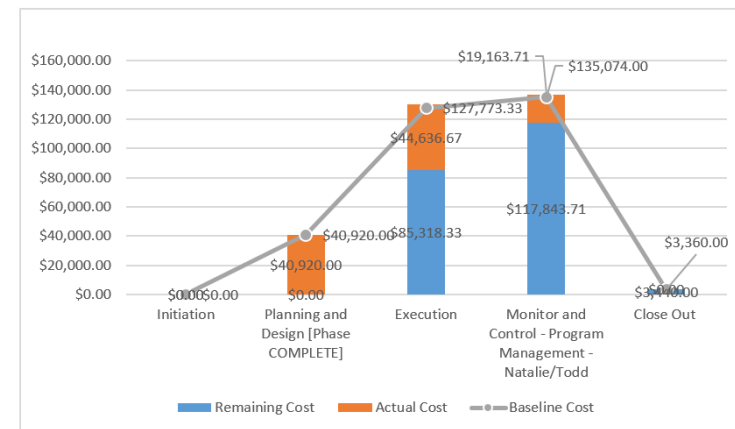
Progress made versus the cost spent over time. If your project is behind the baseline, your project may be over budget.



COST STATUS

Cost status for all top-level tasks. Is your baseline zero?

[Try setting as baseline](#)



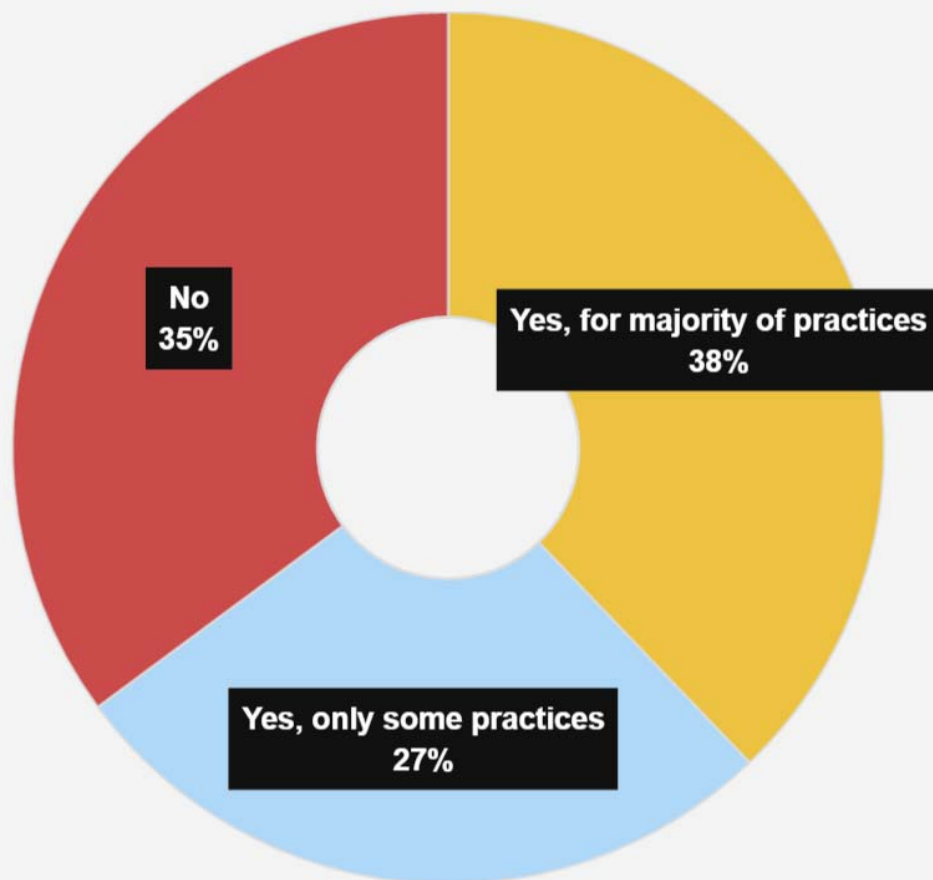
TO TASK CODE OR NOT?

Estate Planning (EP100	Project Administration		Ace, Docketing		
	EP200	Client Intake/Fact Gathering				
		EP210	Client call			
		EP220	Initial client meeting			
		EP230	Prepare drafting memorandum (amemo)			
		EP240	Review existing estate planning documents			
		EP250	Review asset information			
		EP260	Client summary/background			
	EP300	Drafting				
		EP310	Draft estate planning documents			
		EP320	Draft Insurance Trust			
		EP330	Draft Grantor Trust (QPRT, GRAT, SERT, ERT)			
		EP340	Draft Notes, Agreements			
		EP350	Associate Legal Review			
		EP360	Partner Legal Review			
		EP370	Revisions to estate planning documents			
		EP380	Customized drafting (equalization clauses, unequal distributions)			
		EP390	Prepare documents for mailing			
		EP395	Research, discussions with content experts			

LET'S SHARE - POLL!



Does your firms utilize task codes?



Slide 27

Cnf4

Poll: Poll 4: Does your firms utilize task codes?

Cnf, 8/31/2016



(L) PM ESTABLISHMENT – HOW TO TRANSLATE THE “P”

LPM or PM is more than creating reports and providing statuses, it is establishing a solid practice and weaving it into the culture of the organization.

Tweetable
Quote



PM IN PRACTICE





GETTING BUY IN





GETTING BUY IN – PM PRACTICE

Continues Improvement





PM STRUCTURED AND REPEATABLE PROCESS

- Plan the project
- Manage the project
- Regular and controlled communication with project stakeholders
- Prevent "scope creep"
- Measure outcomes and close all loops





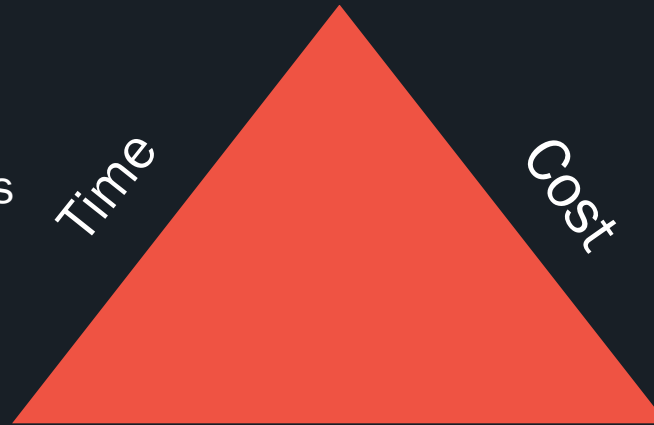
(L) PM MATURITY IN A TRIANGLE

Time measures are
important to avoid delays

Time

Cost

Cost measures are
important to avoid cost
variances



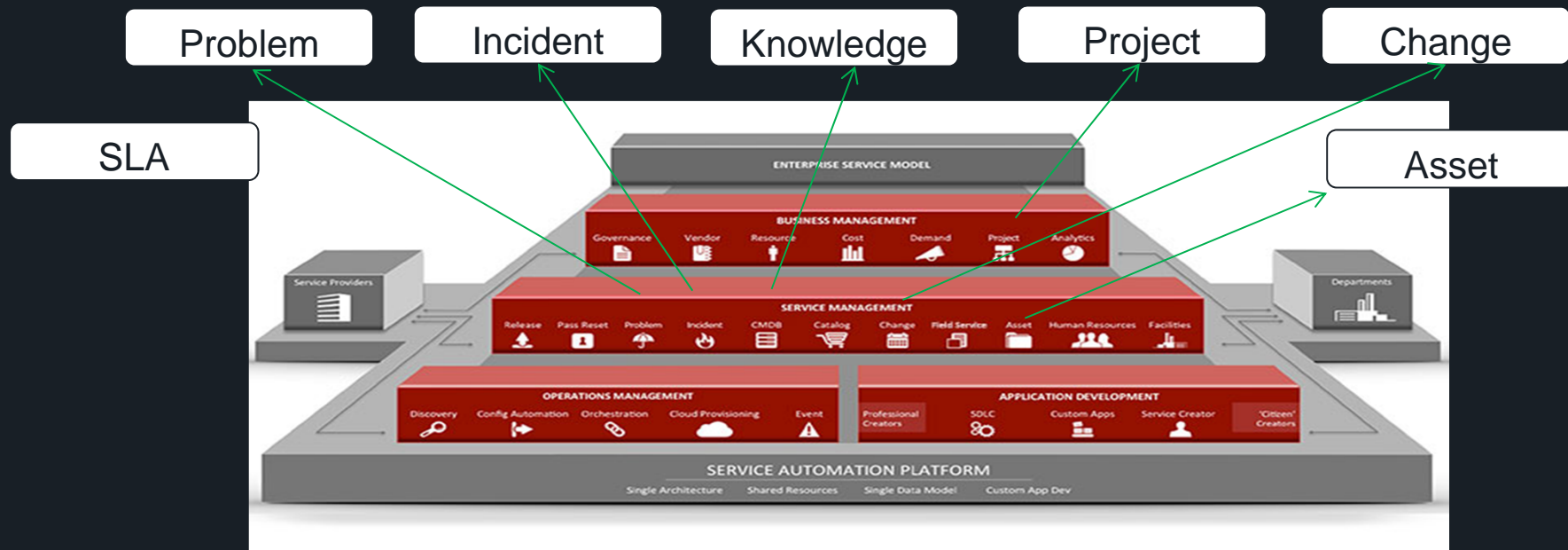
Scope

Scope measures are important to meet customer satisfaction



SERVICENOW IS OUR IT SERVICE MANAGEMENT (ITSM) TOOL

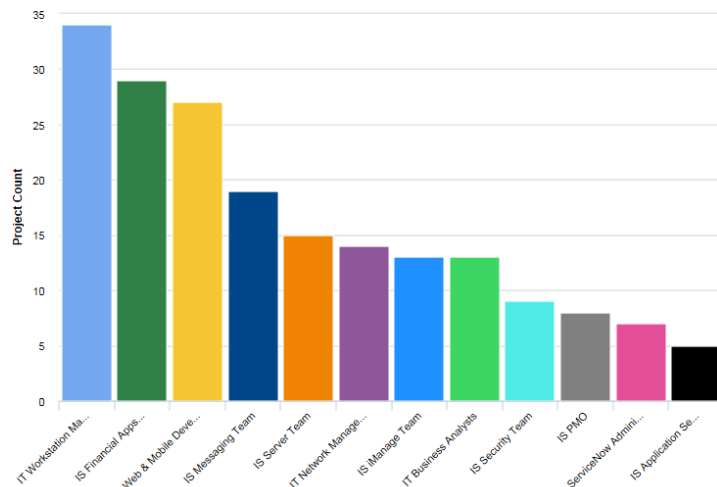
ServiceNow provides us with a platform to manage our IT services. We have deployed:



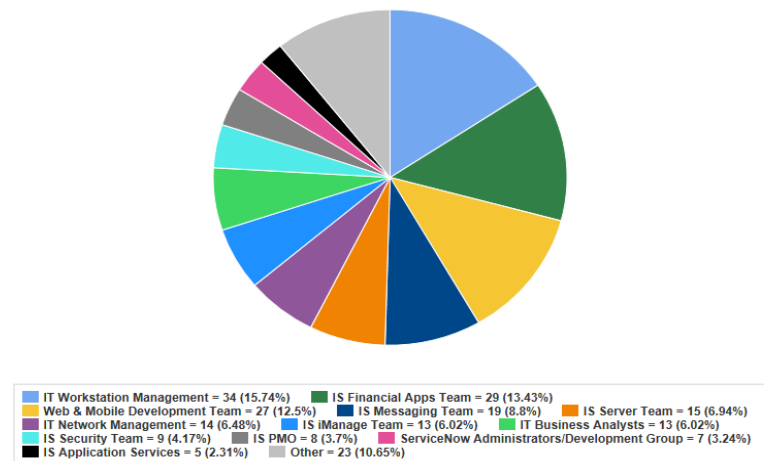


SERVICE NOW DASHBOARDS

2016 Project Roadmap

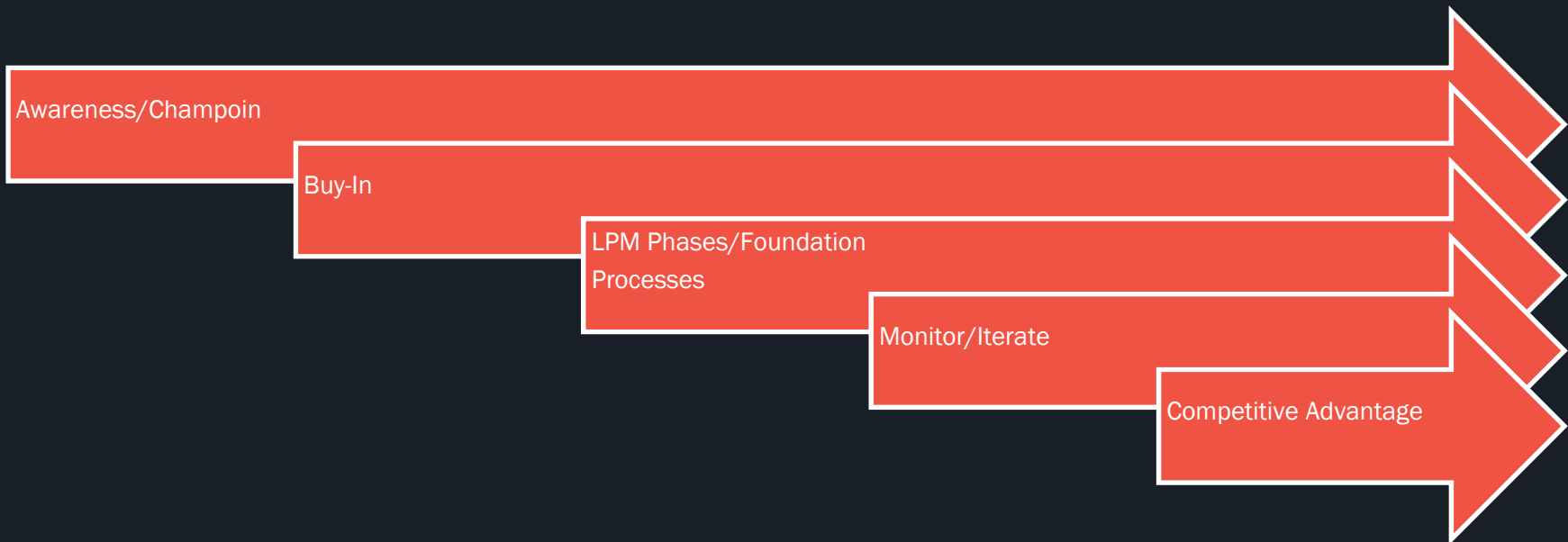


2016 Project Roadmap (Pie)





LPM - GETTING STARTED


















PM GETTING STARTED

- Establishing a successful PM practice requires a champion and strong upper management sponsorship.
- PM's are not lawyers, can support implementation of strategy not lead it.
- PM represent a culture shift, be patient, open and receptive
- Align technical projects to firm strategy. Listen to the business
- Use real time data to measure progress and milestones
- Implement an effective workflow tool to track all phases of the project
- Conduct regular project status meetings (risks and issues only).
- Provide project visibility to the milestones via dashboards.
- Communication, Communication, Communication!!!

THANK YOU/Q&A/DISCUSSION

Total Poll # Answered

Polls		 Create
View results by clicking on a Poll		
Which firms have a formal PMO/LPM Department or people in these positions?  Locked  41		
What methodology and approaches have you used in your firm?  Locked  55		
Does your firm have processes documented?  Locked  54		
Does your firms utilize task codes?  Locked  37		

CONNECT WITH PANELISTS



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