

## **Project Management Advisory and Training Services for General Counsel**

Project management is a well-established discipline that has been effectively adopted in other industries. It has evolved significantly over the last decade in order to apply to a broad range of activities such as software development and R&D efforts, as well as more traditional large-scale manufacturing.

QLex has been coaching and training lawyers in this critical area for over five years. Aileen Leventon, QLex principal, has developed a range of tools and techniques in both her advisory work and her law practice for over 20 years. As project management by lawyers becomes a trend – rather than a fad – QLex is enthused to help others become proficient.

The role of general counsel demands development of business and project management skills. QLex can assist clients with the development of these skills in a wide variety of ways including:

- 1. Programs designed specifically for small groups on project management skills and techniques*
- 2. Programs for large groups on developing business literacy for lawyers using project management*
- 3. Interactive webinars on project management – designed to meet the client's need*
- 4. Project management webinar archives – available by subscription*
- 5. Telephone and e-mail support on project management*
- 6. Building support through Practice Group leader engagement*
- 7. Programs for small or large groups to educate lawyers about alternative fee arrangements- each program is designed to meet a particular client's unique needs*
- 8. Facilitate workshop with clients and law firms*

### ***1. Programs designed specifically for small groups on project management skills and techniques***

The general counsel selects a practice group, business unit, legal team or other sub-group and QLex will then develop tools for their immediate use. This type of program would provide attendants with tools that are ready for immediate use and are intended to increase the general counsel's overall effectiveness and efficiency. We would work with each participant to select a subject matter that is suitable for the program.

These skills programs generally entail several facilitated sessions requiring approximately 8 hours per lawyer of his or her time spread over several months. There are several formats that may be suitable but a typical arrangement involves two on-site lunch workshops or interactive webinars, and includes a pre-set allowance of telephone and e-mail support.

## ***2. Programs for large groups on developing business literacy for lawyers using project management***

General training programs for large groups are usually held in a workshop format. These programs will allow QLex to demonstrate the benefits of incorporating project management techniques into the practice of law. To do this, QLex will present tools and techniques for immediate use and demonstrate the benefits of adopting these tools and techniques using a “hypothetical matter”. We are able to provide our own generic hypothetical, create ones that are customized for your firm or use real-life stories/examples from a client’s firm or department.

A general program which uses a case study or hypothetical requires the general counsel’s input throughout the development of the program to assure the relevance of the hypothetical for the client. It is important that any examples or hypotheticals used throughout the program are consistent with the firm’s understanding of their profitability profile, client mix, business development activities, practice management issues and goals.

A customized program would require collecting limited background information by extracting data from the department’s matter management and e-billing systems. QLex will then review the data with a designated champion/practice group leader or Responsible Attorney.

## ***3. Interactive webinars on project management – designed to meet the client’s need***

We deliver webinars on the application of specific tools and methodologies in different types of legal work at your firm. Topics are narrowly focused and may be presented from the following perspectives:

- ✓ Project management for specific types of legal work (litigation, complex case management, transactions, counseling, compliance, regulatory, corporate governance)
- ✓ Project management for different types of clients
- ✓ Project management to promote profitability (Organized around pricing models: fixed fees, maximizing realization of hourly-rate billing, value-based and incentive-based fees)
- ✓ Budgeting (Working with assumptions, financial data in your financial systems, activity-based costing, task-based billing)
- ✓ Law firm economics (Presentations for new partners, office managing partners, senior associates, practice group leaders, non-lawyer professional staff, legal assistants)
- ✓ Law department management issues and their impact on law firms (corporate metrics, “make vs. buy” decisions, alternative legal service providers)
- ✓ Business literacy for lawyers (basic finance concepts, basic business strategy, how to use financial statements, metrics and performance measurement)

## ***4. Project management webinar archives – available by subscription***

QLex is developing a library of webinars on using specific project management tools in law practice. We also have a “back-list” of presentations that we are adapting for general webinar format.

#### ***5. Telephone and e-mail support on project management***

QLex can maintain ongoing contact with interested lawyers to coach, monitor progress, and serve as a sounding board on effectively using project management techniques. The focus would be on specific matters or in general business development and retention efforts. We are also available to provide support on specific RFPs, in which we would suggest models and business analytics techniques to assess predictability and value based on different scenarios.

The duration and extent of our involvement would be dependent on the situation, but we would expect to be available for an unlimited amount of time throughout the agreed upon time period – from 30 days to a year.

#### ***6. Building support through Practice Group leader engagement***

QLex help helps clients build support for any project management initiative by engaging the practice group leaders in conversations about their needs. We conduct structured interviews in which we hone in on issues and obstacles with existing and prospective clients, internal procedures, geography, type of work, staffing, and professional development issues. It would also be valuable to speak to key members of law department operations as part of the assessment. In order to provide effective support relevant background data is typically request.

These conversations would take the form of on-site or telephone interviews lasting approximately one hour each. QLex will then present findings as a high-level profile of practitioners’ existing skills, readiness for change, gaps, and professional development needs with respect to project management. We would also bring to your attention any organizational and strategic issues that we may identify.

#### ***7. Programs for small or large groups to educate lawyers about alternative fee arrangements- each program is designed to meet a particular client’s unique needs***

QLex can help lawyers in corporate legal departments understand how to work with firms as they propose alternative fee arrangements. We combine our experience as a buyer, seller and provider of legal and other professional services as well as data analytics and profitability analysis.

In order to successfully execute a fixed fee, for example, lawyers need to employ project management and estimating techniques. These techniques must be tied together, rather than treated as separate activities. Handling a matter- whether it is litigation, transactional or regulatory- involves making assumptions about the complexity of the work, identifying the resources and staff to handle the work, and translating that into a budget and work plan. Successfully working with that budget and work plan, while maintaining transparency with clients, are key elements of effective project management practices.

#### ***8. Facilitate Workshops with clients and law firms***

The key to successful project management is collaboration among all participants – stakeholders – in a situation. The ability of lawyers in firms to improve their skills, will be bounded by their communications and building a shared understanding with their clients.

We have successfully conducted workshops with law departments and law firms jointly to learn basic project management techniques. A general counsel, for example, may seek to improve the value it receives from a law firm and seeks a third party to support brainstorming and facilitate dialogue. The sought after result is an appreciation of how project management techniques enhance the relationship; the quality of work; renew focus on appropriate staffing; fee predictability for the general counsel and improved realization for the law firm.

Law firms are now well aware that they must be responsive when a client takes the initiative to review work processes associated with *how* legal work is done and services provided– and jointly learning new skills relating to legal project management - to achieve that goal.