

Project Management Advisory and Skills Training for Law Firms

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.

For law firms, the integration of project management techniques should promote profitability, client satisfaction, business development efforts (including responses to RFPs), professional development, and overall effectiveness in law practice.

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.

Firms are facing significant challenges in maintaining acceptable levels of profitability and integrating client feedback on fee levels and structures. Trends in acquiring new business (reflected in RFPs, for example), and increased risk arising from fixed and other alternative fees, have created further hurdles. The economic environment, coupled with firms' commitment to understanding and responding to the market for its services lead firms to acquire or enhance project management skills.

What we do – Starting out

1. Overview presentation

QLex would provide a general exposure to project management concepts at a [regularly-scheduled] professional training session. Aileen Leventon will make the presentation and will use illustrations from prior experience as a practicing and as a management consultant to the legal profession. Biography is enclosed.

QLrx will develop a presentation which is suitable for any meeting format and will incorporate the law firm's feedback to ensure that the materials are directly relevant to the law firm and its clients. The presentation will refer to specific tools, although they would not usually be deployed in the training session. Preparation will require conversations with members of the firm.

2. Skills coaching for immediate use

QLex can work closely with a practice group leader, partner or associate. We would train them in the use of appropriate techniques on a specific matter with that client. This approach would develop project management champions who see value in integrating the discipline into their practice and would communicate their enthusiasm to others.

This work would be conducted through a combination of brief on-site meetings, webinars, and telephone or e-mail support that accommodates the lawyers' schedules. QLex is available

on nights and weekends as needed. We would maintain ongoing contact with these lawyers to monitor progress and to continue support on effectively using project management techniques. The duration and extent of our involvement would be dependent on the lawyers selected, but we would expect to be available for a pre-set amount of time.

At the conclusion, QLex would conduct a formal on-site debriefing session with the practice group leader, partner, and other relevant participants. Its purpose would be to assess both the value of the content and tools, as well as the overall approach for developing or enhancing project management skills.

How we work:

Aileen Leventon will provide all services in this engagement. To the extent she requires support, she will draw from a national network of seasoned affiliates who are deeply engaged in providing advisory services to the legal industry. If an affiliate participates in a QLex engagement, work is conducted under the QLex umbrella, and we are responsible for all aspects of the engagement. All affiliates are subject to confidentiality agreements with QLex and are mindful of privilege and conflict of interest issues.

Nearly all of our colleagues have practiced law; those lacking law degrees have spent at least 20 years supporting lawyers in executive positions in firms and corporate legal departments. All have practical business experience, and are committed to deliver useful services to the legal profession.

Additional Project Management Advisory Services for Law Firms

- 1. Small group skills program on project management*
- 2. General training for all lawyers on project management*
- 3. Interactive webinars on project management – on demand*
- 4. Project management webinar archives – subscription*
- 5. Telephone and e-mail support on project management*
- 6. Building support through Practice Group leader engagement*
- 7. Alternative fee arrangements*

1. Small group skills program on project management

The law firm selects a practice group, client team, associate profile, office, or other sub-group. QLex would roll out tools for immediate use. The intended effect of this type of program is demonstrate to law firms how best to incorporate project management techniques in real-time. QLex will work with each participant to select a matter that is suitable for the program.

The skills program would entail 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 each involves two lunch workshops on-site or interactive webinars, and a pre-set allowance of real-time telephone and e-mail support.

2. General training for all lawyers on project management

These programs are conducted in a workshop format in which QLex presents tools and techniques for immediate use, and shows lawyers how they can incorporate project management techniques based on a “hypothetical matter.” We are able to provide our own hypothetical or one that is customized for your firm.

A general program would require client involvement on the selection of the hypothetical. Input on the relevance of the hypothetical is intended to assure that it is consistent with the firm’s understanding of its 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 firm’s financial and business development systems, and reviewing the data with a designated champion/practice group leader or Responsible Attorney.

3. Interactive webinars on project management – on demand

QLex can create 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 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 – 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 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 profitability 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 for whatever time period you would like – from 30 days to a year.

6. Building support through Practice Group leader engagement

QLex can build support for a project management initiative by engaging the practice group leaders in conversations about their needs in meeting profitability and client service goals. We conduct structured interviews in which we hone in on issues and obstacles with existing and prospective clients, geography, type of work, other segmentation criteria, staffing, and professional development issues. It would also be valuable to speak to key members of firm management as part of the assessment, accompanied by relevant background data that we typically request.

These conversations would be conducted on-site or by 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. *Alternative fee arrangements*

QLex helps firms develop alternative fee arrangements, working in close collaboration with those involved with business development, client relations, finance and relationship partners. 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. We tie them together, rather than treat them 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, and maintaining transparency with clients, are key elements of effective project management practices.

Aileen Leventon

BIOGRAPHY

Aileen Leventon has been a business counselor to the legal industry and a practicing lawyer for 30 years. Through her firm, QLex Consulting, she supports lawyers at all levels with customized training and coaching to enable practicing lawyers to integrate business literacy in their practice.

She has successfully offered continuing legal education courses and workshops on such subjects as budgeting, project management, and corporate business strategy, as well as consulting on how to structure profitable and predictable fee arrangements and many aspects of law firm economics. Audiences include members of corporate legal departments, senior law department managers and law firm client relationship partners.

After receiving her MBA 15 years ago, Aileen served as a partner in the global legal management consulting practice at PricewaterhouseCoopers, followed by two years as a partner at the US office of Blaqwell Inc. She began her legal career at Proskauer Rose LLP in New York, followed by an equal period as a transactional lawyer at Equitable Life/AXA.

Aileen has held staff positions by functioning as chief operating officer of internal organizations during the PricewaterhouseCoopers merger and integration. She also served as the COO and CFO of Blaqwell, Inc. and has held executive positions several private company and not-for-profit turnaround situations and entrepreneurial organizations.

Aileen is involved in numerous legal and business professional organizations. She is regularly invited to speak at conferences (i.e., Ark Group (upcoming April 7, 2010 on Appropriate Counsel, Association of Corporate Counsel, National Association of Women Lawyers, American Bar Association), moderate panels (i.e., Legal Marketing Association, Corporate Legal Times) and serve as a commentator and source of background for publications (i.e., *Inside Counsel*, *Counsel to Counsel*). Over the course of her consulting career, she has also published articles on numerous legal management topics ranging from benchmarking to records management. In 2007, Aileen was also interviewed on NPR's *Marketplace* program.

Aileen graduated from Columbia Business School in 1994, Cornell Law School in 1977, where she was Managing Editor of the Cornell Law Review, and from Stony Brook University (State University of New York) in 1974.