



LEGAL PROJECT MANAGEMENT – PLANNING TO WIN

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A defense verdict sounds like a “win,” but that’s not how most cases resolve, and it’s not the only path to “success.” Clients demand predictability in legal expense, consistency in work product, and a lawyer who thinks about legal problems as business problems. We’ll look at how the systematic approach of Legal Project Management (LPM) can help lawyers, clients and carriers each find more litigation success. Beyond some basics about what LPM is and how it’s changing legal service delivery, this Roundtable will challenge each participant to build on real world examples as we explore the potential impact of disciplined scoping and planning of litigation assignments. As we consider various approaches to early project management, some techniques will get a deeper look to make the concept of LPM actionable. With help from a panel with perspectives including lawyer, client, risk manager, agent and carrier, this Roundtable is designed to build skills *each of these constituents can use right away.*

Roundtable Discussion

- 1) Introductions & Welcoming Remarks
- 2) Overview of Legal Project Management
 - a) Purpose – What are we trying to accomplish and what problems are we trying to solve?
 - b) Phases of a Project - Handling a legal assignment as a project:
 - i) Scoping & Planning
 - ii) Execution
 - iii) Closing
 - c) Client Expectations & Impact on Service – What is the perspective of clients and carriers? How do they expect to see project management skills, processes and tools

impact the handling of their cases? What is already being done and what can be improved?

- 3) Scoping & Planning – Focus on early case handling using project management skills.
 - a) Stakeholder Analysis – Building a communication plan based on understanding who can impact the handling and outcome of a case.
 - b) Risk Analysis – Developing a change management plan by appreciating what can alter the track, timing and expense.
 - c) Effective Planning & Budgets – Developing a plan that is specific in terms of work, staffing, milestones, dependencies and cost.
- 4) Tools & Artifacts
 - a) Documenting project management steps. What level of documentation is necessary and how does this relate to existing client guidelines?
 - b) What tools are available and used by lawyers and clients to manage and track progress of a case collaboratively?
- 5) Wrap up comments – Conclusions & review of takeaways. Recognize how project management methodology can be incorporated right away!

Example of Guideline that expects use of Legal Project Management:

Scoping	<ul style="list-style-type: none">• Matter Plan and Budgeting: Unless otherwise advised by the Company, the Firm will prepare, in consultation with the Company, a plan, including a budget (the “Plan”) for each matter. It is expected that the Plan will be submitted within 30 days of the matter/project being assigned to the Firm. The budget will be submitted via the Company’s required medium. The Plan will outline:<ul style="list-style-type: none">○ the scope of the work;○ an assessment of liability;○ an assessment of damages;○ the strategy to be pursued to obtain the optimal result;○ the staffing required;○ the significant timelines to complete the required steps;○ the estimated hours and significant expenditures.
Planning	<p>The Plan, including the budget, will be reviewed for approval by File Handler shortly after being submitted. The Firm will track actual hours worked against the budget and the staffing profiles set out in Schedule A. Budgets will conform to the Plan, reflect major assumptions, identify specific work phases, and estimate the cost of each phase of a complex matter.</p>
Changes	<p>It is recognized that the Plan may change over time. All material changes to the scope of work of the Plan will be reviewed with, and require the approval of the File Handler prior to implementation.</p>

Questions for Stakeholders:

- ✓ What is your goal or objective?

- ✓ What are you trying to avoid?
- ✓ What would be a good result? (Do others in your organization agree?)
- ✓ How can we understand your business better?
- ✓ Are there parts of the investigation or handling that you want to take on or help?
- ✓ If we've worked together before, what do you hope we do better or differently?
- ✓ Who will be involved in making decisions about this case?
- ✓ Do you have an expectation of the defense cost?
- ✓ How long do you think this case will take to resolve?
- ✓ What is the best way to communicate with you?

Stakeholder Analysis

Role	Name	Comments/Communication Expectations and Needs.
Client(s)		
Client employees		
Client personal attorney or in-house counsel		
Others related to client		