

Legal Project Management: It's Not Just for Big Firms Anymore

By [Carla Landry](#) on March 22, 2018

Last month when I was participating in the Practising Law Institute's (PLI) annual [Project Management for Lawyers](#) seminar, several panelists' comments resonated with me. One remark was made by a Shareholder, [Tim O'Leary](#), from [Sandberg Phoenix & von Gontard PC](#). Tim started his introduction with a slide that said nothing more than "Legal Project Management – It's **NOT** just for **BIG** firms anymore." He is Coordinator of the Sandberg Phoenix Legal Project Management Initiative (more on that below).

Tim is on to something I think. He mentioned that Sandberg has approximately 140 attorneys – not an AmLaw 200 firm. Although the impetus behind the smaller firm need for LPM might not be driven by clients as much as it is in Large Law, some of the other drivers are the same. For example, reducing write-offs/write-downs is something every firm faces – large and small. Now, as larger firms continue to deliver services for a lower cost, smaller firms are less able to compete on price – something that was historically a go-to competitive advantage for them. Effectively managing matters with LPM techniques reduces write-offs and write-downs, among other things. Firms that are successfully implementing LPM attest to this and track those statistics. Equally as important is to acknowledge that just because your clients are not asking for LPM expertise, does not mean they don't notice when you have it. In fact, firms using LPM techniques to manage matters with clients who are not asking for it have reported that, at least today, it can create a significant competitive advantage – and that applies to smaller firms too ...but that advantage won't last forever. Seeking that competitive advantage is what drove the Managing Partner at Sandberg to push for LPM implementation.

One of the biggest challenges in implementing an LPM initiative for a smaller firm is having the resources and expertise to do so. This fact brings me to the second comment from PLI's annual LPM program that resonated with me. My co-panelist, [Leah Guggenheimer](#), Chief Process & Innovation Officer at Burford Capital said "process improvement is a scarce resource." At the time, we were running a panel on legal process improvement and its link to LPM, but the application I see to implementing an LPM initiative at smaller firms is that these firms have limited resources to tackle many initiatives. Smaller firms are forced to prioritize and possibly outsource. Smaller firms have to figure out how to implement LPM with limited resources.

Sandberg's LPM journey, according to Tim, was started by their Managing Partner (MP). Deciding that the "future is now," their MP decided implementing LPM should be an objective included in their strategic plan. Sandberg wanted to be able to show to their clients "we care about you as clients" and they know LPM brings value to that client relationship. They decided to do this before their clients asked for it. Sandberg took some initial steps – trying to implement an LPM initiative after reading a few books on the topic – and then they decided to find experts to help. The "right fit" for them was to find an expert who would help implement an LPM program that was designed for a firm of their size, culture and goals.

Sandberg's approach was to start small – two pilot teams – and build out from there. Each pilot team was comprised of a mix of perspectives (i.e., partners, associates, paralegals, and finance staff). They included finance staff because they were familiar with the systems – systems the firm already had that could support LPM techniques. They didn't want to design an LPM program around a technology, but rather design the LPM program and utilize existing technology to support that program. LPM "cheerleaders" (as Tim called them) were born out of the pilots and the success of those pilot teams. What's next for them?

- Broadening the use of LPM tools and techniques among other matter teams,
- Building internal expertise or identifying resources who can support the initiative firm wide, and
- Determining metrics to use to measure success.

Sandberg's definition of success will be defined by their firm – for their size, culture, and clients. They're implementing LPM because they recognize LPM provides tangible value to clients. They're doing this before they're being asked to do it by their clients. Implementing LPM challenged them to think outside the box a bit.

I think smaller firms are up for that challenge. Sandberg Phoenix & von Gontard PC seems to be up for the challenge. Are you?