

LPM Is For Individual Lawyers Too: Here's What You Should Know

By [Susan Raridon Lambreth](#) on September 7, 2021

A Bloomberg Law article included this quote: *"Any lawyer who has ever managed a matter or planned a budget has acted as a project manager. But a new movement is now underway to improve legal results by applying best practices from the formal discipline of project management."* Most lawyers don't think of themselves as project managers, even "legal" project managers but clients expect their matters to be actively managed. So, how do lawyers that are not sure how to do this get started?

Sometimes LPM starts with just one lawyer working on an individual matter without the help of professional legal project managers. LPM, after all, is not always a firm-wide initiative. We have had many individual lawyers take our LPM courses, online or live, to enhance their service delivery to clients, reduce their write-downs or write-offs and make their lives easier.

In part 6, the final part of our series, we asked the speakers at the [recent LPM Global Summit](#) what advice they had for individual lawyers trying to implement LPM. These lawyers can use the same LPM approaches as legal project management teams when it comes to scoping, task management, budgeting, managing to budget, risk analysis, and more.

Here's what our speakers told us.

Plan for Success

Planning is perhaps the most important part of LPM. It's the critical step that allows you to identify goals, anticipate and manage risk, and ensure the timely delivery of legal services. Further, planning helps individual lawyers avoid reactive decision-making and the wasting of valuable time. It's one of the best ways to ensure that work proceeds timely.

As an individual lawyer, it may be tempting to cut corners to speed things up. But Ranjit Oliver, Executive Director at Allen & Overy, says that's not a good idea. "Spend time on planning your matter. Don't just dive into drafting the first document. Planning saves so much time and heartache," she says.

Kevin O'Sullivan, Director of LPM at Baker McKenzie, is also a fan of prioritizing planning. O'Sullivan suggests that lawyers invest time considering the approach. "Stop at the beginning of the matter, think about how they're going to approach it upfront and at a certain level of detail. The time spent ...will reduce frustration, duplication, and inefficiency as well as that [feeling of] lack of control." O'Sullivan says that this is particularly true for large client matters.

It's All About Process

David Rueff echoes an opinion we often share: "When it comes to LPM, you don't need technology...LPM is really about process."

Here's the LPM definition we often use:

Legal project management is a process of defining the parameters of a matter upfront, planning the course of the matter

at the outset with the facts you have at the time, managing the matter, and, at the end, evaluating how the matter was handled (from both the firm or law department perspective and the client perspective).

Notice that technology does not appear anywhere in the definition. Rueff says that for lawyers, even individual lawyers, the process distills down to three primary steps:

1. Developing a good scope statement
2. Using that scope statement to develop an estimate
3. Using that estimate to communicate expectations to the team

“If you just do those three things right there, you’re going to be an excellent legal project manager...You’re going to achieve success by helping the client understand that you’re not just a lawyer providing great legal services, you’re also a good steward of their money, a business partner, helping to achieve that result in a cost-effective way,” says Rueff.

But how do you develop a good scope statement? For Rueff, good scoping starts with the engagement letter.

“One of the easiest ways to accomplish the scoping is developing a better engagement letter. Most engagement letters are standardized forms at law firms. But you can improve on that by providing more clarity about the services that you’re going to provide. If you’re working with someone who is not a lawyer, provide some detail about what is going to be involved in your delivery so they understand the matter,” he says.

Rueff warns that lawyers shouldn’t make assumptions about what the client may or may not know, even for small matters. The best project managers articulate how the delivery of services will look as well as help the client understand and anticipate changes.

After all, it’s much easier to communicate your assumptions on the front end than to justify them upon billing. Clients shouldn’t be expected to understand what could happen and how the matter might change. It’s important, too, that all team members understand what went into the estimate. It’s nearly impossible to overcommunicate when it comes to estimates.

Remember the KISS Principle

Large matters can be quite complex. But whether the matter is big or small, LPM should not be complicated. LPM works best when you stick to a simple framework that accomplishes the pre-determined objectives while anticipating problems and managing risk. If your project plan seems too complicated, it probably is. Use the processes, tools, and templates that contribute to getting the job done and those that add value.

Blandine Davies, Director of Practice Services & Head of Legal Project Management EMEA for Norton Rose Fulbright, says, “Keep it really simple and just do it...Don’t over-engineer. It’s really what the clients want and, at the end of the day, it’s what the business needs.”

According to Jason Pryz, Assistant Director of Legal Project Management at Mayer Brown, “My advice to a lawyer, will be not to force anything. And this is the advice that I give everyone, project managers included.” Pryz says that there may be tools, charts, and graphs available to you. But before you build in an additional administrative task, it must have a purpose. “Just because it exists doesn’t mean you should use it. Use what makes sense.”

Plan for success. It’s all about process. Remember the KISS principle. Those are the words of wisdom from our speakers.

We do recognize that many lawyers already use some aspects of project management to manage their work. But those that use a structured LPM methodology are at an advantage.

LPM allows you to:

- Identify risks and develop risk management strategies
- Use a plan that aligns your approach with the client expectations
- Provide visibility into the progress and status
- Identify issues proactively
- Manage progress for the timely delivery of legal services

We hope you've enjoyed this series of articles on the Global LPM Summit. Thanks for reading. If you missed the Summit, you can find replays [here](#). Plan ahead to attend the next Summit in 2022. Or, in the interim, consider taking a course on LPM. You can access a free 90 minute session on LPM today (or later, it is recorded) on MyLawCLE as part of their Mini MBA for Attorneys. Use our access code LawVision21 for free access. You can also take an online or virtual live LPM certification course this fall. Information about these courses is here ([online](#) or [virtual](#)).