

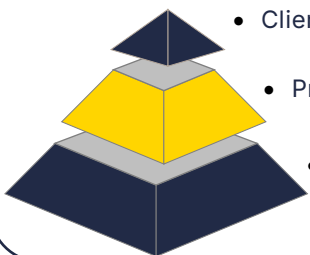
ROLES: WHAT THEY DO

- Sponsor: client budget holder
- In-House legal: client's legal team
- Lead partner: responsible for legal advice
- Lawyers: specialist legal advisors
- Trainees: training to be a lawyer
- Paralegals: legal professionals who support lawyers with drafting, reviewing, and more
- LPM: a problem solver, optimises processes, and deploys efficiency levers to manage budget
- Billing: finance and billing support
- Pricing advisor: commercial/finance advisor
- Legal tech advisor: technology expert
- Law firm: leading international, specialist, or boutique (e.g. Magic Circle, US firms)
- ALSP: alternative legal service provider ([Cognia](#))
- Captive ALSP: Law firm-owned ALSP (e.g. [CC](#))

LEARNING: PM AND LPM

- [Prince 2](#)
- [Wellington](#)
- [Six Sigma](#)
- [AMP](#)
- [IILPM](#)
- [PMI](#)
- [MSP](#)
- [Law Vision](#)
- [Agile](#)

HIERARCHY: MATTERS VS PROJECTS



- Client: Portfolio of matters
- Practice: Programme of matters
- Individual: Matters/Projects

4. CLOSE

- Closure checklists
- Condition precedent (CP)
- Condition subsequent (CS)
- Capture lessons/knowledge
- Seek client feedback
- Continual improvement

1. SCOPE

- Define objectives
- Agree on assumptions
- Forecast resources
- Pricing model(s)
- Set tolerances
- Track assumptions

3. DELIVER

- Resource
- Deploy efficiency levers
- Kick-off and communicate
- Monitor workstreams
- Scope change & escalations
- Transparent reporting

2. PLAN

- Timeline
- Time sheets
- Dependencies
- Critical path
- Communicate
- Anticipate risks
- Efficiency levers



MATTER: REPORTING

- Align client and advisor expectations
- Report value, not only cost:
 - Time: Achievements and next to do
 - Scope: New or changes to scope
 - Cost: Financial forecasting

- Tools:
- [Power BI](#)
 - [Tableau](#)
 - [Excel](#)
 - [Zoho](#)

MATTER: LEGAL TECH

No longer a value add, but essential to the law firm's present/future operating model

- [Legal Tracker](#)
- [HighQ](#)
- [Juristic](#)
- [Clio](#)
- [BigHand](#)
- [Onit](#)
- [Legora](#)
- [Harvey AI](#)
- [Smartsheet](#)
- [Telescope](#)
- [Pursuit](#)
- [Apperio](#)

MATTER: ECONOMICS

- Rate card
- AFAs
- Volume discount
- Recovery
- Leverage
- WIP/Fee
- Write-off
- Lockup
- Accretive
- Dilutive

COMMON TERMS: PM VS LPM

- Translate the PM jargon into legal terms:
- PID = Engagement letter/RFP
 - WBS = Phases & tasks
 - Gantt chart = Plan on a page
 - Kanban = Progress monitoring
 - Budget = Estimate or AFA
 - Scope log = Extract from engagement letter
 - Benefits = Objective, eg, target value/date
 - KPIs = Indicators of time, scope, & cost
 - Dependency = Sequencing of activities
 - RAID = Risks/Actions/Issues/Decisions
 - Lesson log = Knowledge

NETWORK:

- [CLOC](#)
- [LPM Network](#)
- [Legal Geek](#)
- [Legal Ops](#)
- [APM / PMI](#)
- [ACC](#)