

Project Management in the Law Firm



You need that when???

Unexpected tasks with tight deadlines are pretty common in litigation. They can be disruptive, stressful, and — too often — poorly executed. One way to increase your odds of success and, at the same time, minimize your stress, is to treat those unexpected tasks as ‘projects’.

Tasks just happen. Projects are managed. They are planned, they are monitored, and they are adjusted. If you approach each unexpected task as a project and apply some basic project management techniques, it’s likely that things will go more smoothly. This article provides some tips for doing that.

- Jane Gennarelli, January 20, 2020

Consider Your Task a 'Project'

In recent years, Labor Street has worked more and more with small and mid-size law firms - firms that often operate with a lean staff but handle big cases. Time and again we see attorneys and paralegals stretched to the limit handling unexpected tasks that need to get done right away - tasks that may have them working around the clock until they are done.

Let me give you a couple of recent examples:

- A client involved in a huge mass action litigation was required by the court to submit proof of representation for each of the 15,000-plus plaintiffs it represented. Our client had only two weeks to locate and electronically submit a fully executed contract for each of them.
- In a large class-action settlement, a client needed to provide a breakdown of its time records to the court so that fees could be determined. The client had more than a half dozen attorneys and over fifty support staff working on the case over a 5 year period. Because this was a plaintiff law firm, their time records were not kept in a uniform fashion — they could not be turned over without review, consolidation, and, in some cases, a more granular breakdown.

In both situations, the tasks were unexpected and the deadlines were tight. One of them turned out well. The other, not so well. And the difference was the approach.

These types of tasks are often shrugged off as the 'nature of the beast'. To some extent, that's true. But good management of a time-critical task will increase the likelihood of its successful completion, and it will also minimize the stress levels of team members.

First, start thinking of a task as a 'project'. This is important because 'tasks' are usually delegated and expected to get done. 'Projects', on the other hand are managed. They are planned, they are monitored, they are adjusted. If you approach every task as a project and apply some basic project management techniques, it's likely that things will go smoother.

Let me suggest some common-sense project management steps you can take. Try them the next time an emergency task lands on your desk.

Do Some Planning

Projects are rarely successful without some planning. It's not a good idea to just start the work and hope for the best. Here are some basic planning steps that should always be applied:

1. **Define the project.** All you need are a few sentences that clearly state what needs to be done. It's important that the real goal doesn't get miscommunicated.
2. **Figure out the scope.** How much work is this, and by when does it need to be done? Can one person do it in

a day? Will it take four people a week? Estimate the hours it will take. Look at the due date. Do the math. Figure out how many people are needed to finish on time.

3. **Determine who will do the work.** Look at each component of the task and for each, determine if it must be done by an attorney, or can it be done by paralegals, legal assistants, or other people in the firm? For many projects, you'll use a mix of different types of people. Once you've determined that, identify the individuals.
4. **If required, calculate costs.** Usually the biggest cost component is people. You've already estimated how many hours it will take and who will be assigned. Multiply hours by billing rates, include expenses if that's a factor, and you've got a quick and dirty idea of costs.

Put your plan in writing. It doesn't have to be more than a paragraph or two. If you are a junior attorney or support staff member, make sure to send it to the senior attorney who is in charge of the work. If you are the decision maker, put it in writing so you can look back and understand what work was done and how you approached it.

Get Off on the Right Foot

Unless you are doing all the work yourself, you need to communicate goals and give instructions to the project team. You don't need to plan and orchestrate a formal training session or prepare a detailed instruction manual.

But you do need to make sure that everyone on the team knows what to do. Here's an approach:

1. **Give instructions to the project team as a group,** not one-on-one. This way everyone hears the same thing.
2. **If the task is complex or has a lot of steps, put together a 'cheat sheet'** (a list of the steps). This can be very helpful, especially when the team first starts the work.
3. **After you give the team instructions for doing the work, ask someone to repeat them back to you.** This should uncover any misinterpretations of your instructions and foster a consistent understanding of them.
4. **Let team members know what is expected of them.** For example, if the task is reviewing documents, let them know how many documents they need to review in an hour to finish the project on time.
5. **Start out with everyone working together in the same space,** especially if the work is unique or new to the people assigned to the project. Find a conference room, training room, or project area that you can use. This way, everyone benefits from questions posed by individuals. In addition, you may need to modify instructions to accommodate the unexpected. This is much more likely early in the project.

It's a lot easier to iron out wrinkles and communicate new instructions when the group is together. Once the

project becomes routine, it's okay to let people return to their own work areas.

6. **Check work early.** Look at each person's work to make sure that everybody is on track. Do this as early in the project as you can. It's much better to catch inconsistencies and misinterpretations of the instructions early in the game, before a lot of work has been done.

Monitor the Work

On a project with a tight deadline, it's important that you know where things stand. You need to check status early and often so you can make adjustments, if needed.

Let's say that you have a team reviewing documents and they each need to review 20 documents an hour to finish on time. Check on the pace every few hours. You'll know pretty quickly if your estimate was off and you need to add another person or two.

Learn from Your Experience

Keep a 'lessons learned' notebook and update it after each project. When a project is done, take notes on things that went particularly well, and why they went well. If there were rough patches, make notes about that too. For each problem, make notes on what happened, why it happened and how you'll do it differently next time. Share these notes with team members.

Before you start a next project, take a look back on 'lessons learned' notes from previous projects. This will help you to get a little better with each project.

Get a Better Result

The two situations I mentioned at the top of this document were each handled in a different way, and they had very different results.

In the case of the contracts, the work was assigned to a non-lawyer project manager. Although it had the tighter deadline, it was well managed. We recognized problems quickly, we adjusted staffing and procedures to deal with those problems, and we finished the work by the deadline.

In the case of the time records, no one was assigned clear responsibility. Instead, multiple people — including a junior lawyer, a paralegal, and a member of the technical staff — were each given vague assignments. No one had overall responsibility. As a result, the team was not managed, the work was not monitored, and the work did not get done by the deadline. In fact, team members did not realize that they wouldn't complete the work until the day the submission was due. A submission was made, but it was missing hundreds of senior attorney hours. (On the bright side, the court gave everyone a second chance, and more complete records got submitted later).

Managing work effectively (even on a small project) is critical.

- It can determine whether you meet or miss a deadline.
- It can mean the difference between high-quality work and work that is flawed and cannot be relied upon.
- It can mean the difference between a team that is motivated and one that is burnt out.
- It can eliminate - or at least minimize - the need for 'all nighters' that are counterproductive for the organization and unhealthy for the staff.

Basic project management techniques are easy to apply, add significant value to any project, and can mean the difference between a successful project and one that fails.

Labor Street is a custom software development and litigation project management firm. We specialize in designing and implementing software, processes, and project teams for large scale litigation.

Jane Gennarelli is Labor Street's senior project designer and manager. She has experience in designing and running litigation projects in hundreds of cases, where exposure was in the billions of dollars, and the collection, analysis, and use of data had to be performed under tight deadlines.