

Use Project Management to Tame the Client Service Beast

By [Laura Ernde](#)

In her more than a decade of working at law firms, first as a paralegal and later in marketing and business development, Sarah Tetlow noticed that many of the lawyers were not always well organized when it came to delegating tasks and managing projects. It's not surprising, considering the nature of the work and the lack of training in that area.

It's a reactive profession, says Tetlow. "The partners are feeling the reactive needs of their clients every single day. That trickles down. There's a lot of stress, anxiety, frustration. It's Groundhog Day every day."

Tetlow, the founder of [Firm Focus LLC](#), saw firsthand how embracing project management can help lawyers tame the client service beast, among other benefits.

Don't Leave Without a Map

In some ways, project management is putting a name to something that has been around for a long time — the idea of mapping projects from start to finish, says Legal Typist founder [Andrea Cannavina](#), who helps law firms streamline, automate and delegate their workflows.

A firm's project management needs will vary depending on the firm's size, its practice areas and industry focus as well as the types of projects it needs to manage. "There is no one size fits all when it comes to managing a law firm. Everything has to be tailored," Cannavina says.

Not only will learning project management skills make your life easier, but your [clients may demand it](#) — if they haven't already.

According to Law Vision's [Susan Lambreth](#), founder of the LPM Institute, law firms are feeling pressure from clients to use legal project management, process improvement, alternative staffing models and other approaches that drive greater efficiency and lower legal spend.

Less Complexity, More Predictability Equals Happier Clients and Staff

"Legal project management, at its core, views a matter as a project. It breaks the project down into stages and component parts, and reduces its complexity and unpredictability," says Larry Port, co-author of the ABA book ["The Lean Law Firm."](#)

Viewing cases as projects has a number of critical advantages, Port says, including standardization of operations, increased insight for management, reduction of errors and more

predictability when it comes to revenue. If you've been practicing for a while, when you take on a new client you probably have a good idea of what needs to be done and how much time it will take. Why not begin every client engagement with a road map of the work in hand? That's essentially what project management is — setting aside time to get the work done and assigning clear roles and deadlines. Investing as little as 30 minutes at the beginning of a matter will save hours of scrambling and unnecessary internal emails later on that you most likely won't be able to bill for. (See Port's Attorney at Work article, "[Legal Project Management Demystified.](#)")

"Your work becomes more efficient. You're able to bring on more clients. You're able to do more things," says [Debra Hildebrand](#), a management and training consultant who teaches project management at Stanford University.

Clients will be pleased their matters are being handled in the most streamlined way and your whole team will be happier having well-defined expectations, Tetlow adds. And that can lead to another benefit — less turnover of clients and staff.

BigLaw Markets Project Management as a Branded Service

Larger law firms have caught on to the benefits of LPM and are starting to incorporate professional project management into client engagements. Littler Mendelson created its [CaseSmart platform](#) almost a decade ago. According to Littler's website, the platform was "designed to help deliver consistent, high-quality legal work to employers through an efficient workflow while also providing critical data analytics that help employers make more informed business decisions."

Likewise, [Baker Donelson](#) formed a certified legal project management team to "provide in-house counsel with valuable guidance and direction on how to manage legal matters more efficiently," according to its website.

Project Management Tools and Tech

For a solo practitioner or small law firm, having a certified, professional project manager on staff may be overkill. Still, all law firms can learn project management basics and benefit from using project management tools like [Smartsheet](#), [LiquidPlanner](#) or [Basecamp](#), Hildebrand says. There are numerous options, including a few like [ProofHub](#) that are marketed specifically to law firms.

While not strictly project management software, today's practice management and case management software, by definition, manages cases, matters, documents, clients and finances — typically all in one place. Some include built-in project management features such as workflow templates for various matters, matter checklists, task assignment tracking and reporting tools.

Even adopting simple productivity tactics such as sharing documents using Office 365 or [Google Docs](#), or sharing a to-do list (using apps like Todoist, [Wunderlist.com](#) or Evernote) can make a big difference, Tetlow says.

However, a productivity tool is just that — a tool. Laying the foundation through learned techniques and time management skills is essential for total project management.

Project Management Drives Revenue, Growth and Morale

Hildebrand shared a case study from a consulting engagement for a small county government agency whose projects require input from a variety of stakeholders. Over eight months, she helped standardize the agency's work, transforming it into a more collaborative and efficient machine.

“The morale has really gone up in the organization because they're able to schedule out the work,” she says. “They're efficient. They're not reinventing the wheel. We changed their culture basically.” A year later, she is still getting thank-you emails.

Port reinforces the importance of project management's role in driving revenue and growth: “It follows that if you have the mechanisms at your disposal to know if your cases are ahead or behind, you can predict reliably when you're going to get paid. You can then begin to predict your total revenue for the quarter or year. And when you predict your revenue, you can increase it, because you have an understanding of the mechanisms that drive (or inhibit) your revenue.”

Do you use project management? What are your favorite tips and tools? Let us know at editor@attorneyatwork.com.

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