Top 10 Legal Project Management Requests

By Jennifer Fletcher and Monica Ulzheimer

During the last several months, we have had the good fortune to work with a number of in-house counsel on legal project management (LPM) training sessions who like the checklists and want their outside counsel to improve the way they manage the delivery of legal services using LPM. We hear that message consistently echoed during client feedback interviews conducted by our senior management across all the practice areas of the firm.

This article discusses the top 10 requests that we receive from our clients, covering all the stages of LPM—engagement, planning, execution and review. The end result is more efficient and effective delivery of what the client needs and wants. Moreover, the overall relationships between clients and their law firms improve.

1. Put the scope of the legal matter in writing.

Early in the engagement phase of a matter, it is critical to outline the scope of the matter. Clients appreciate this most of all when the scope is delivered in writing, in the form of an engagement letter for larger matters or even direct e-mail communications for more routine or smaller matters. Using templates, such as an early case assessment, can be helpful for handling both litigation and transactional matters to clarify objectives and identify initial strategies to be employed. This helps ensure that the client and the law firm share a common understanding of the engagement scope.

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2. Engage in a conversation about what inside counsel is handling versus what outside counsel is handling.

More often than not, a client has internal resources that can be used for effective execution of a legal assignment. These resources are sometimes overlooked when assigning tasks on a matter. Using these internal resources rather than law firm administrative staff for some tasks can save the client money. Having a conversation with the client about what tasks and deliverables the client’s internal team can handle shows that the law firm cares about the client’s bottom line.

3. Communicate about budget.

Clients may want more than a single number when it comes to the expected budget to handle a matter. A conversation about budget should include assumptions around known and unknown circumstances that could impact the final number. Most importantly, clients appreciate updates on changes to the budget before an invoice is submitted. Clients want their outside counsel to proactively track the budget progress and communicate early and often if material aspects of the matter begin to fall outside original expectations. Clients do not want to be surprised by anything that appears in the invoice.

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4. Submit invoices on time and in the client’s requested format.

Clients want to pay their outside counsel for their services, and they want to pay invoices in the same cycle as the deal or relevant matter phase. When a firm delays invoices, the clients have difficulty in reconciling their own internal accounting documentation for the service provider. Additionally, invoices should be in the format that is required by the client and should follow outside counsel guidelines for time information, task codes, if applicable, and notifications for unbilled activities that were value-added or not permissible under the client’s outside counsel guidelines.

5. Conduct project kick-off meetings.

If the client and the firm have agreed upon the details in the early case assessment, the next step is to conduct a meeting to kick-off the project to ensure that everyone on the team, inside and out, understands the objectives and approach. Kick-off meetings should have a formal agenda and allow sufficient time for questions to clarify any outstanding issues.

6. Discuss status updates.

As part of the kick-off meeting, law firms and their clients should agree on how matter updates will be delivered and on the frequency and format of updates. The client and the firm should also establish how changes in the matter should be addressed, who has decision-making authority on shifts in direction and how that may impact the original budget estimate.

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**Kick-Off Meeting Tasks**

- Summarize the project by team leaders;
- Summarize previous projects similar in nature (if they exist), including best practices or lessons learned;
- Discuss team members and their roles;
- Describe phases, tasks timelines, deliverables and budget;
- Discuss milestones and potential deal breakers;
- Establish a process for keeping the team updated on developments; and/or
- Schedule regular team meetings; and
- Decide who is responsible for establishing the agenda for those meetings.
7. Talk about expected outcomes and deliverables.

Occasionally, the client may have a different result in mind than the law firm understood for a particular project deliverable. The law firm may be preparing a full-blown memo with every scenario addressed whereas the client may prefer a simple e-mail with bullet points describing key issues. Scope and limitation matters should be discussed and understood by both the client and outside counsel.

8. Share industry information.

One of the strongest messages we hear from clients during feedback interviews and in our project team training is that clients appreciate when a law firm can provide insight into industry trends and best practices to which they may not yet be exposed. A deep understanding of the client’s business and its industry may allow a firm to more quickly address issues before the client even knows that something may be at risk, ultimately helping the client avoid more costly legal matters in the future.


Knowing a client’s outside counsel policies and billing guidelines is critical to the success of any law firm’s relationship with the client. This can be vital to the in-house counsel’s success in communicating with internal clients. Billing guidelines can clarify the difference between a fee “estimate” and a “cap” and can determine how the client wants to be notified should there be any changes to the originally communicated fee schedule. It is important that all participants in the billing process understand these guidelines.

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10. Conduct post-project reviews.

At the conclusion of a matter, the client and the law firm should again consider meeting to review whether the project met the client’s expectations and whether any changes or improvements could be implemented the next time the firm handles a similar matter. The client has made an investment in the process as well as in the specific matter, so “lessons learned” have value. Furthermore, post-project reviews are useful for examining any tasks where technology may have improved efficiency, how well the in-house and law firm team members handled any changes to the scope of the matter, and how well the team communicated and kept each other informed.

Since the launch of Sutherland’s legal project management program in 2010, we have trained more than 250 of our own timekeepers and hundreds of in-house counsel through our in-house training workshops as well as through programs with the Association of Corporate Counsel, highlighting best practices to improve the efficient delivery of legal services.