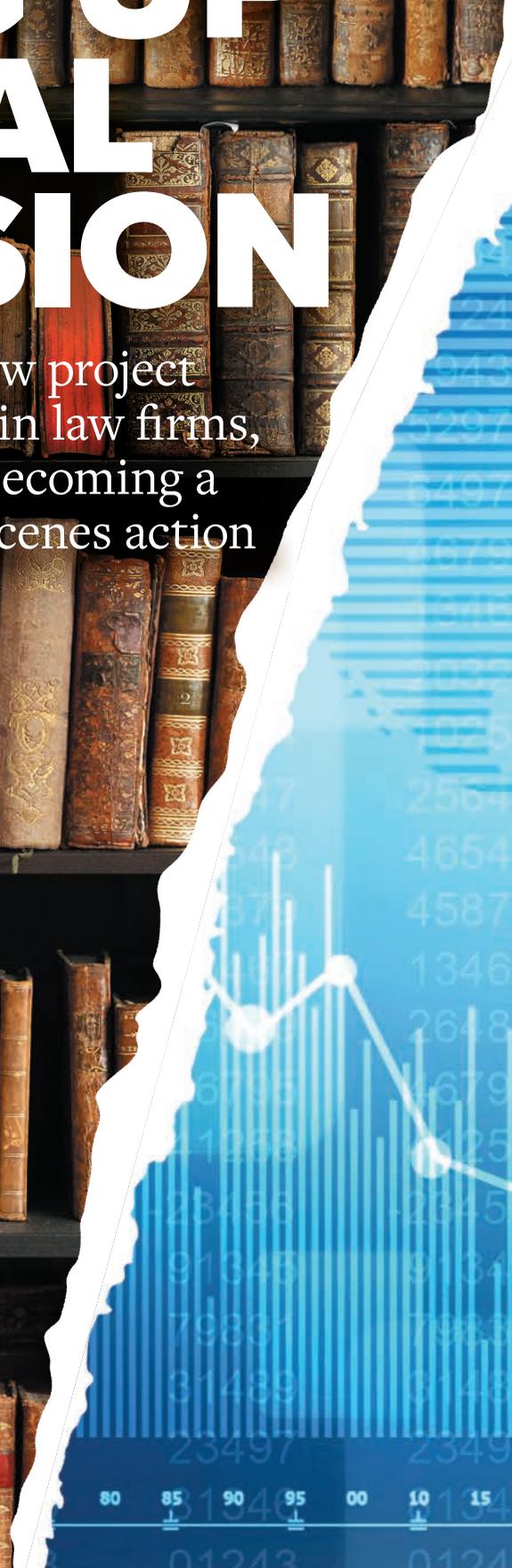


SHAKING UP THE LEGAL PROFESSION

Alexander Garrett investigates how project management is gaining a foothold in law firms, where legal project managers are becoming a necessary part of the behind-the-scenes action



Last year, two decades after being admitted to the Law Society as a qualified solicitor, Neil Franklin added a somewhat different string to his bow. For the Bristol-based partner in law firm TLT, who is also a practitioner in alternative dispute resolution, adding APM's Project Management Qualification to his credentials was a natural next step. On the face of it, these are two starkly contrasting worlds – one rich with symbolism of ermine and wigs, the other associated with technology and spreadsheets. But Franklin sees it differently: "I view myself as a project manager and as a lawyer. I don't think the two are inconsistent. I'm probably unusual in doing both, but I feel – and the firm feels – that it's a really positive contribution to the work we do for clients."

Legal project management (LPM) is a discipline attracting growing interest among corporate law firms, part of a

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race to make the delivery of services more transparent, predictable and cost-effective. LPM emerged around a decade ago, notably in the US, and has been steadily gaining traction since. Franklin's interest was piqued in his early days at TLT, when he found himself running thousands of related cases for financial services clients. "I developed processes for dealing with those matters, and I didn't have any formal project management skills, so I started to read about it and develop my own. As I moved on to larger-scale projects in our financial services practice, including remediations and regulatory investigations, I decided I needed to become properly qualified."

ACCIDENTAL PROJECT MANAGERS

In the legal sector, early forays into project management were internally focused, revolving around the introduction of networked IT systems or change programmes such as mergers or relocations. LPM marks the introduction of project methods on the client-facing side of law firms, but it also explicitly ►►

An innovative approach at Simmons & Simmons

For the international firm of Simmons & Simmons, founded in London more than 120 years ago, project management has been introduced through an innovative approach designed to involve all the firm's lawyers and focus on the level of service delivered to clients. "About two years ago, we looked at market research and found that all law firms were falling short on a number of things," says Aman Sharma, a Chartered Project Professional and Fellow of APM, and head of the firm's Service Excellence team. "They were all technically giving great legal advice to clients, but were falling short on meeting clients' expectations, for example on value for money, cost certainty and quality." Sharma set up the Service Excellence team with two clear objectives: "To make sure we were consistently exceeding our clients' expectations in the delivery of legal services, and to optimise the way our lawyers were working."

Caroline Hunter-Yeats, a partner on the firm's International Executive Committee was brought in to sponsor the initiative; she had personal experience of using a project management approach after being asked to do so by a major client. "We felt very strongly that this had to be a change at grassroots level," she explains. "I'd seen a number of firms who had hired a legal project manager then dropped them into a group and expected miracles to happen. I didn't think that, in a law firm, that's how you create change. We had to give our lawyers a framework

to do what they were doing, but more efficiently and visible to our clients. We created a global Service Excellence Standard based on the foundations and principles of project management."

Service Excellence aimed to look fundamentally at a different way of lawyers doing their job. Sharma says: "We consulted a number of senior lawyers and business heads, who said: 'If this is going to work, you need to see the whites of our eyes in all the countries and it mustn't be UK-centric.'" Her team – Francesco Della Rotonda, a specialist in business diagnostics, and Michael Dada, an experienced legal project manager – organised a series of 80 workshops over a year, reaching out to all of the firm's 1,000-plus fee-earning lawyers, as well as support staff across 22 international offices. Workshops were tailored for the 49 individual practices within each office.

"I was told I would be lucky if I got 20 per cent attendance because lawyers are so busy," says Sharma. But with the backing of active sponsors in Hunter-Yeats, managing partner Jeremy Hoyland, managing director of solutions Ben McGuire and 49 national leaders, they achieved 80 per cent attendance. The workshops introduced lawyers to a structured project management approach – doing what they did before, but in an optimal and efficient way. This provided them with skills and tools that are now mandated for use by all the firm's lawyers. For smaller legal matters, they run the project management themselves, but for larger, more complex matters, Sharma has built a team of legal project managers, led by Dada. "I wanted to create a chartered, platinum set of legal project professionals from a wealth of different backgrounds," she explains.

The benefits, says Hunter-Yeats, include "winning work I don't think we otherwise would have won. We are getting plaudits on the quality of our pitches and the transparency within them, and the quality of the team that we bring." She adds that: "The bit that always bugged me was the waste of resource where, effectively, someone was being asked internally to do something that the client didn't actually want and was never going to pay for. Now that happens far less often."



Aman Sharma

recognises something that lawyers have always done.

Dee Tamlin, head of client and legal project management at Pinsent Masons, says: "When I train our lawyers, I always acknowledge with them that they are accidental project managers. Just because we haven't called it project management before now doesn't mean they haven't been doing that in some form for the past 100 years or more. A lawyer gets instructed, works out the scope of what needs to be done, then estimates the time and costs." LPM puts that on a professional, more consistent and methodical basis, she explains. "Instead of reinventing the wheel every time we get a new instruction, we can have templates for different work types, and ensure that if our UK office produces a status report, it looks the same as one produced by our Australian office."

Some think the initial impetus for LPM was the increasing complexity of big legal cases; others say it was borne out of a desire by banks to cut legal costs post-financial crisis. It's clear that clients

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are driving much of the adoption of LPM, not least because they are used to deploying project management and the clear reporting benefits it brings. But while most of the bigger law firms have at least dipped their toe in the water, LPM is still at a fledgling stage across the profession as a whole.

NATURAL ADVANTAGES

Global law firm Baker McKenzie was one of the early adopters and claims the largest LPM team worldwide, with a mandate to grow further. Its London-based associate director of LPM, Kevin O'Sullivan, says: "Some clients are much more open to this than others, and there's a lot more to uncover. At the more mature end, we are playing a leadership role: communicating directly with clients,



leading teams, managing the throughput of tasks and recording some of the highest numbers of hours on a project.”

A ‘SECOND PROFESSION’?

The range of ‘matters’ – the legal term for an assignment – where LPM has been found to be most valuable includes those where there is complexity, but also where there is a high level of technology or a significant amount of process involved, O’Sullivan explains. “The most natural landing place, where we should most definitely be considered, is the transactional space, often involving loans, M&A, private equity, banking, tax or real estate.” At the other end of the spectrum, few would attempt to use LPM where a client is simply asking for advice.

Key benefits for the client include efficiency, control and risk management, resulting in a better overall experience and increased satisfaction. Tamlin says that it is a more collaborative way for lawyers and clients to work together. “Traditionally we would have got the instruction and the lawyers would have gone into ‘doing’ mode pretty quickly, not always fully understanding what the objectives of the project were,” she explains. “Now we’re saying: let’s hold a planning meeting with the client. I’ve done one recently, and the client was so responsive. No legal work has been done yet, but we’ve planned exactly what we need to do and the client is fully engaged.”

On the other side of the coin, says Tamlin, “we no longer have to expect our lawyers who are highly qualified and extremely versatile in legal advice to take on a second profession. Just as we don’t say to a plumber that they have got to be an electrician.” That said, many firms try to introduce the main body of their legal professionals to the benefits of LPM through some form of training. “Once they understand what it is, we’ll ask them: what is the thing that you most want to get off your desk because it is the most

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time-consuming? It could be weekly cost reporting, and once they see us do that, they wonder what else we can do. And once they engage, they don’t want to run projects without us.”

In any case, most legal project managers realise they can’t hard-sell their approach to colleagues and a more subtle approach is required. Simon Muller, head of LPM at Addleshaw Goddard, says: “The trick is very much to find those people who have an existing interest in this approach, or a potential challenge that they need help with, and a client who is keen on a better way of working. If you get the timing right, they are very interested in working with you. But it can’t be a solution looking for a problem.”

ACCELERATING FROM AN ORGANIC START

How the LPM offer is structured will vary from firm to firm. At TLT, Franklin says: “It started organically, and I was one of the advocates of a central LPM function, which we have introduced over the past two years. Before that, there were individual legal project managers across the firm, dealing with matters in an ad hoc way, and we wanted to create more uniformity and consistency in how it was done at TLT.”

At Baker McKenzie, there is a hybrid model, O’Sullivan explains: “We see this

as a change programme, so we need to get hearts and minds aligned, and on that basis we need to be on the ground with our lawyers to help them understand LPM and talk to their clients about the experience. But we also have service centres that are our bench strength to make sure we have enough people to fulfil the needs of clients and internal teams.”

With a shortage of those with extensive experience of LPM, recruits tend to range from those who entered the law profession and now want to branch out, to people from completely different backgrounds such as consulting. O’Sullivan says: “One thing we look for is what we call ‘humble confidence’. It’s a mixture of being humble enough to accept that a legal project manager can’t really bring an ego to the table – there’s enough lawyer ego there already – and having confidence to challenge and be bold in offering new ways of doing things.”

LESS CLOAK AND DAGGER

Project management is already fundamentally changing the way law is managed and it is set to make further inroads. Muller says that use of more advanced technology and automation will be a key development in the next few years. “Many lawyers and legal project managers still do things in a very manual way,” he remarks. “But if you could organise your data so that you hit one button and the right report falls out, that kind of tool would be really helpful.” Systems already record lawyers’ hours, and one challenge is to integrate that data into project management, says Muller. The next step, he adds, would be to use the data for benchmarking, to scope future projects and to generate insights for future matters.

For some, LPM is a catalyst in changing the nature of the law firm itself. At Pinsent Masons, Tamlin says: “Our firm’s strategy is now to be a professional services firm with law at its core. Think of the different elements involved in delivering legal services; we have people like forensic accountants and data scientists, and there might be one of those in the project team alongside the lawyers.”

And at Baker McKenzie, O’Sullivan says LPM is part of a shift towards a more transparent profession. “Law still has this aura: throw it into the black box and we’ll get it done and you don’t need to worry,” he says. “The reality is that clients need to be more involved these days. They need it to be done in a more visible, more approachable way, less cloak and dagger. People aren’t just worried about the result, they want a better journey.”