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Project Management in Law Firms: A New Role for Librarians?

by Ted Tjaden[1]

Overview

Is the recent interest in legal project management simply a fad or a lasting reality? The speed
by which legal project management has gained prominence in the last year[2] suggests it might
be fad; however, the better view is that legal project management is here to stay, given that
the recent economic downturn has caused fundamental shifts within the legal industry.[3] As
such, the efficiencies and cost-savings achieved through legal project management mean that
law firms will need to adopt project management principles – and in some situations
fundamentally change the way they practice law – in order to meet client demand for more
cost-effective, efficient legal services.

This paper – aimed at members of the Canadian Association of Law Libraries / Association
canadienne des bibliothèques de droit who may not yet be that involved with legal project
management – provides a brief overview of the subject and discusses a possible new role for law
librarians. Discussion is divided into the following three broad topics:

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[1] National Director, Knowledge Management, McMillan LLP. The views presented in this paper are mine
alone and do not necessarily reflect the views of my firm, although my firm strongly supports legal project
management and has developed and continues to develop a number of project management initiatives with
clients.

[2] As an example of the recent interest in the topic: a search on "legal project management" in *The Lawyer's
Weekly* had only 5 hits, but with all of them being within the past year.

[3] These shifts are well-documented by Richard Susskind in *End of Lawyers? Rethinking the Nature of
Legal Services* (Oxford: Oxford University Press, 2008) and the report by Evershed LLP released in March
2010 called "Law Firm of the 21st Century: The Clients' Revolution" that concluded, based on interviews
with clients and lawyers, that the current recession has accelerated change in the legal sector by 10 years
with hourly rate billing giving way to value billing as clients start to hold the power in the legal supply
relationship – see Eversheds LLP, "Law Firms Sharpen Up As Legal Recession Cuts Legal Sector to Size"
(22 March 2010), available online: *http://press.eversheds.com*.

1. **Definitions of legal project management**: To understand legal project management, there is first a brief overview of the shifts within the legal industry that have caused the recent interest in the topic. And since the phrase "legal project management" can encompass a wide variety of activities and unique terminology, it may also help to define some of this terminology, including what we mean by project management and understanding various concepts such as six sigma, DMAIC, *lean* six sigma, Gantt charts, the Iron Triangle, and alternative fee arrangements.

2. **Examples of legal project management deployment in law firms**: With a better understanding of legal project management terminology, it helps to see legal project management in action by looking at the typical projects law firms have undertaken and how they have applied project management principles and technology to their daily workflow.

3. **The role of law librarians in legal project management**: Finally, this paper will finish by looking at the role for law librarians in supporting legal project management, including looking at the interplay between research and information/knowledge/project management.

Despite the recent interest in this topic, project management has yet to infiltrate the traditional legal literature in any serious way, aside from a few key resources listed at the end of this paper. Since the discussion here provides only a brief overview of the topic, readers wanting more information on legal project management should consult the listing of the major books, articles and blogs in the bibliography.

1.   Definitions of legal project management

What then is legal project management? Simply put, as stated by Levy, legal project management is "the application of the concepts of project management to legal cases."[4] This of course begs the question: what is project management? In simple terms, it involves a structured approach to managing large projects such as building a skyscraper or designing and launching a new product, all on schedule and on budget. The Wikipedia definition describes project management as "the discipline of planning, organizing, securing and managing resources to bring about the successful completion of specific project goals and objectives."[5]

Traditionally, law firms have operated in a relatively protected monopoly where firms generally charged by the hour. Although this model has been criticized for some time, it was really only the recent recession combined with a number of other factors – the so-called "client revolution"[6] – that has motivated law firms to meet client demand for more cost-effective legal services by exploring legal project management as a means of reducing costs and better managing large files:

> Until very recently, lawyers that did recognise the term have considered the concept of project management beneath them. After all, lawyers were artisans not merchants or manufacturers. Each matter was unique and required the utmost flexibility. But the topic has been getting growing attention, especially from clients who have seen internally how important project management can be to efficient operation. Many outside lawyers are, as a result, starting to realize the 'artisan' argument does not hold water. Much of what lawyers do is a commoditised process. Even within highly customised bet-the-company cases, there are elements of commodity work and the process is similar from one case to the next, even if the facts are not.[7]

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[4] Stephen B Levy, *Legal Project Management: Control Costs, Meet Schedules, Manage Risks, and Maintain Sanity* (Seattle, WA: DayPack Books, 2009) at 42.
[5] Wikipedia contributors, "Project Management," *Wikipedia, the Free Encyclopedia*, *http://en.wikipedia.org/wiki/Project_management* (accessed 26 April 2010).
[6] As described in the Evershed's report, *supra* note 2.
[7] Patrick J. Lamb, *Alternative Fee Arrangements: Value Fees and the Changing Legal Market* (London, UK: Ark Group, 2010) at 52.

Hassett lists out eight tasks that law firms undertake when engaging in project management on client files:[8]

- Set objectives and define scope
- Identify and schedule activities
- Assign tasks and manage the team
- Plan and manage the budget
- Assess risks to the budget and schedule
- Manage quality
- Manage client communications and expectations
- Negotiate changes of scope

Another simpler explanation of what law firms should be doing when introducing legal project management principles involves a four-phase approach to managing a large client matter: define, plan, monitor and evaluate.[9] In the law firm setting, project management can cover all types of client matters, including corporate deals, real estate transactions, large financings, and litigation files.

Within the discipline of project management, there is a lot of unique terminology and acronyms. Fortunately, one does not necessarily need to know and master this terminology to understand the basic steps that can be undertaken to leverage the principles within the law firm setting (with some of these basic steps being discussed later in this paper). However, being aware of this terminology can help. With that in mind, set out below are some simple definitions of some project management terminology:

- **Six sigma**: Six sigma is a statistical term used to describe a very high standard of a defect-free manufacturing process, representing only 3.4 million defects per

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[8] Jim Hassett, *The Legal Project Management Quick Reference Guide: Tools and Templates to Increase Efficiency,* 2d ed (Boston, MA: LegalBizDev, 2011) at 3.

[9] This apparently is the legal project management framework adopted by McCarthy Tetrault – see Heather Colman, "Applying Legal Project Management Principles to Marketing Projects," SLAW (blog) (20 April 2011), *http://www.slaw.ca/2011/04/20/applying-legal-project-management-principles-to-marketing-projects.*

parts manufactured (99.99966% error free).[10] Motorola is credited with first applying six sigma to its manufacturing process in 1986 to reduce defects in their assembly line and the process has since been adopted by many other companies. What separates "six sigma" from other quality improvement methods is its emphasis on a scientific/statistical approach to reviewing and improving workflow processes. It has developed into a fairly established industry with standards and training that sees qualified practitioners earning their "Green Belt" and "Black Belt" rising through to the level of "Master Black Belt" and "Champion."[11]
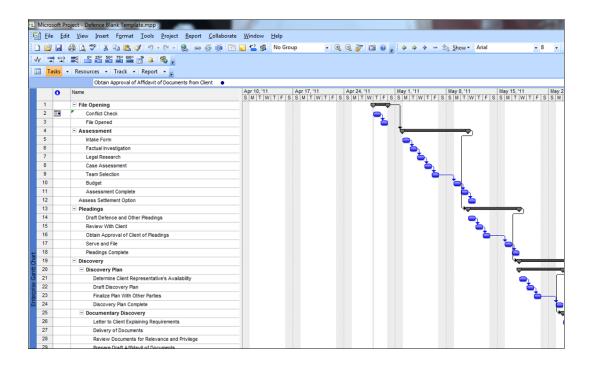
- **DMAIC**: This acronym describes the process in Six Sigma for helping to reduce errors in the workflow process. There are five phases, each represented by a letter in the acronym:

    o **D** = Defining the problem as seen from the customer's point of view and identifying the goal to be achieved by the project.

    o **M** = Measuring the steps needed to produce the product or result and gathering statistics and other relevant data.

    o **A** = Analyzing the data to look for the root causes of problems.

    o **I** = Improving the current process based upon data analysis.

    o **C** = Controlling the new workflow process to minimize deviations and to reduce risk of defects.

- **Lean six sigma**: To the extent that even the most commoditized practice area of law does not come close to producing millions of identical widgets on a manufacturing assembly line, application of pure Six Sigma to the practice of law does not always make sense. As such, some firms have instead explored "Lean"

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[10] Wikipedia contributors, "Six Sigma," *Wikipedia, the Free Encyclopedia*, *http://en.wikipedia.org/wiki/Six_Sigma* (accessed 26 April 2010).
[11] The Institute of Industrial Engineers (*http://www.iienet2.org*) and the American Society for Quality (*http://asq.org*) offer certificate programs in Six Sigma.

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Six Sigma. While the concept of lean in this context is quite variable, it generally places less emphasis on the statistical analysis and instead focuses on "lean production" methods which look at every step in a process and removing those steps that don't create value for the client. Levy, for example, discusses the seven wastes identified by Toyota in their lean production system (excess inventory, extra processing, overproduction, unnecessary moving of product, motion, waiting, and defects) and then maps these to the law firm context, concluding that four of the wastes relate to "non-value added activity" (such as the time wasted tracking down the person with the answer).[12] He does point out that it is relatively easy for law firms to target other wastes, such as overproduction (by not doing more than what the client needs).

- **Gantt charts**: A Gantt chart is a bar chart showing the work breakdown structure or tasks of a major project over time, including the start and end times for each stage of the project, as shown in the following screenshot of a sample litigation defence process map:

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[12] Levy, *supra* note 4 at 328-29.

- **Iron Triangle**: When planning projects, its helps to realize the 3 sides of the so-called Iron Triangle, being **Scope** – **Schedule** – **Resources**.[13] What this means is that there are three elements when planning to organize a project, being the scope of the project, the schedule by which to complete the project, and the resources needed to complete the project. The point here is that changing one of these three elements will always impact the other elements of the project. For example, adding to the Scope of the project (e.g., suing a new third party) will delay the Schedule and take more Resources.

- **Alternative Fee Arrangements (AFA's)**: Invariably, discussion of legal project management involves discussion of AFA's since a driving force behind legal project management is the demand by clients for more certainty and transparency in the legal fees they must pay. While many law firms continue to bill by the hour, increasingly, clients and firms are exploring alternative methods of paying for legal services. Hassett has identified nine types of AFAs used in AmLaw 100 firms, such as **fee caps** where the firm will not bill beyond a certain agreed upon amount (with the firm taking the risk if more work is required) or **risk collars** where the firm bills by the hour based on an estimated budget but gets a bonus if they complete the work under budget or where the client gets a discount if the work goes over budget (an approach that requires some sharing of risks).[14] Lamb summarizes AFAs into three broad categories: (i) fixed fees, (ii) contingency fees, and (iii) modified hourly fees (such as risk collars, described above).[15] No matter what type of alternative fee arrangement is being negotiated, it is in the law firm's interest – especially when there is a fixed fee – for the scope of the work to be done to be well-defined, with a clear understanding of who does what and by when. Stated differently, if a firm commits to an AFA – especially a fixed fee arrangement – they will be motivated to deliver their services on time and on budget. Legal project management goes a long way to achieving this goal.

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[13] *Ibid* 172-73.
[14] Hassett, *supra* note 8 at 87-89.
[15] Lamb, *supra* note 7 at 15.

2.   Examples of legal project management deployment in law firms

With this basic understanding of legal project management and some of its terminology, let's now look at some of the examples in the literature on how various law firms have implemented legal project management on client files (realizing that many firms are also otherwise implementing legal project management without it being mentioned in the press):[16]

- **Eversheds LLP – RAPID Resolution**:[17] As described on its website, this UK-based firm has applied principles of early case assessment to develop a project management tool to help resolve lawsuits more effectively, with "RAPID" being an acronym for the steps in the process:

    o   **R**eview the essential facts
    o   **A**nalyse the best practical outcome
    o   **P**lan your strategy
    o   **I**mplement the plan
    o   **D**eliver the end result

- **Eversheds LLP – DealTrack**:[18] Eversheds is also offering "cost predictability" for clients on significant projects by undertaking to agree on a clear scope of work and an associated budget for that work where the budget will not be increased unless there have been agreed upon changes in scope.

- **Seyfarth Shaw – SeyfarthLean**:[19] Seyfarth Shaw has been leading the field among law firms in the efforts they have applied to most of their practice in adopting lean six sigma to root out inefficient work processes when acting for clients on litigation files. As stated on their website, they have integrated various

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[16] Most of these examples come from Hassert, *supra* note 8 at 52-54.

[17] See Eversheds LLP, "RAPID Resolution," available online: *http://www.eversheds.com/uk/home/ about_us/how_we_work_with_you/rapid_resolution.page* (accessed 26 April 2010).

[18] See Eversheds LLP, "DealTrack," available online: *http://www.eversheds.com/uk/home/about_us /how_we_work_with_you/dealtrack.page* (accessed 26 April 2010).

[19] See Seyfarth Shaw, "About Seyfarth Shaw – SeyfarthLean: A Commitment to Deliver Quality and Measurable Results," available online*: http://www.seyfarth.com/seyfarthlean/* (accessed 26 April 2010). For a good overview of some of their program, see ACC – Association of Corporate Counsel, "Value Practice: Use of Tailored Six Sigma Methodologies at Seyfarth Shaw" (September 2008), ACC Value Challenge Tool Kit Resource, available online: *http://www.acc.com* (accessed 26 April 2010).

tools into their processes, including "best practice templates and checklists, document repositories, knowledge banks, matter management tools and other technology." At a conference last year, I heard a lawyer at Seyfarth Shaw mention they had "process-mapped" over 50 different types of lawsuits to help identify steps that could be eliminated or stream-lined.

- **McDermott Will & Emery – Deal Dashboard**:[20] As described in their brochure, the firm's Deal Dashboard – aimed at making M & A transactions run more smoothly and on budget – is an online, a web-based collaboration and accountability workspace to manage deals and better communicate with clients. It is divided into several sections, providing information on the deal and teams member as well as setting out the tasks, issues, closing agenda steps and budget information, including a running total of whether the project is over or under budget at any given point in time.

- **McCarthy Tetrault – Dialogue Project Management**:[21] As a sign of how far and quickly things have moved with legal project management, McCarthys has recently placed several full page ads in national newspapers advertising their trade-marked "Dialogue Project Management" that includes "a number of customized workplan templates to help in developing detailed plans for mandates, a firm-wide database of professionals to help ensure we bring the best resources in the firm to each matter, estimating tools and best practices to help in developing realistic budgets, and techniques and processes to help identify and account for project risks."[22]

- **BLG**: BLG has apparently had a long history with project management, initially dealing with how they processed IP files. My co-speaker Andrew Terrett has been heavily involved at BLG in implementing project management at his firm by

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[20] McDermott Will & Emery, "The Deal Dashboard: McDermott's Approach to Handling Your Deals, "available online: *http://www.mwe.com/info/dealsdashboard.pdf* (accessed 26 April 2010).
[21]See McCarthy Tetrault LP, "Dialogue Project Management," available online: *http://www.mccarthy.ca/ Project_Management.aspx* (accessed 26 April 2010).
[22] *Ibid*.

taking a functional approach and focusing on the needs of individual practice
groups. As stated by Andrew: [L]awyers who do low-value, high-volume
transactional work would benefit more from tools to assist them in managing their
processes rather than a system that treated each file as an individual project. And
litigators may not find much value in a flow chart planning the progress of a
matter that may not come to trial for five or more years, but they could benefit
from a project management approach to handling all the documents involved in
the discovery process."[23]

Many firms are otherwise looking more generally to various aspects of project management to
improve efficiencies or better meet client demand for most cost-effective services:

- **Budget / fee calculators**: At a very basic but effective level, it is easy for law
  firms to create custom budget or fee calculators using Microsoft Excel
  spreadsheets to cost out the various stages of a lawsuit or large deal, by providing
  rows for the various stages or steps with columns representing the time and hourly
  rate of the various law firm team members staffing the file.

- **Cost control / file management**: A number of firms are customizing
  collaborative workspace or using third-party software such as Serengeti to track
  the costs of large matters.[24] In many situations, these systems can provide "live"
  snapshots of expenses to date and show variances from budget.

- **Training**: Since law schools teach little if anything about project management, it
  is up to most firms to provide fairly extensive in-house training for lawyers and
  staff on how to better manage their large files. In many situations, this will
  involve a combination of outside consultants/trainers working with the
  appropriate lawyers or practice group leaders. As one of the early leaders in this

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[23] As quoted in Kevin Marron, "Buzzword 2010: Project Management" (April 2010) Canadian Lawyer 21.
[24] Nathan Koppel, "Using Web Tools to Control Legal Bills: Big Law Firms Turn to Technology to Provide
Clients With Real-Time Expenses, Automate Tasks," Wall Street Journal (5 January 2010), available
online*: http://online.wsj.com/article/SB10001424052748703580904574638510278407036.html* (accessed
26 April 2010).

area, Seyfarth Shaw by 2008 had trained more than 75 members of its staff – including secretaries, paralegals, IT staff in addition to lawyers – with official Six Sigma Green Belt certification, which required completion of an intensive four month training program, and the successful completion of two Six Sigma projects.[25]

- **Work-breakdown structure and process-mapping**: For the nerdy, anally-retentive among us, it can be intellectually satisfying to "process-map" the steps or stages of a large corporate deal or a lawsuit to then look for ways that process can be improved and streamlined. As part of this process, many firms may assign UTBMS codes[26] to their process map to "mesh" with the billing codes some clients use as part of their financial reporting systems (as shown in the screenshot below):

Steps in a Defence – UTBMS Codes

Task	UTBM
File Opening	
Conflict Check	
File Opened	
Assessment	
Intake Form	
Factual Investigation	L110
Legal Research	L120
Case Assessment	L120
Team Selection	L190
Budget	L150
Assessment Complete	
Pleadings	
Draft	L210
Review With [CLIENT's] Legal Department	L210
Revise	L210
Final Approval	L210
Serve and File	L210
Pleadings Complete	
Discovery	
Discovery Plan	
Determine [CLIENT] Representative's Availability	L330
Draft Discovery Plan	L320
Finalize Plan With Other Parties	L320
Discovery Plan Complete	
Documentary Discovery	
Letter to [CLIENT] Explaining Requirements	L320
Delivery of Relevant Documents	L320
Prepare Draft Affidavit of Documents	L320
Review of Affidavit for Privilege	L320

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[25] See Association of Corporate Counsel, "Value Practice: Use of Tailored Six Sigma Methodologies at Seyfarth Shaw," *supra* note 19.

[26] UTBMS stands for Uniform Task Based Management System, which are a series of codes used to classify the legal services performed by a law firm in an electronic invoice submission, created by the American Bar Association, the Association of Corporate Counsel and PricewaterhouseCoopers – see: *http://www.utbms.com.*

- **E-discovery files**: With the advent of mandatory e-discovery rules taking effect in most Canadian jurisdictions, law firms are establishing procedures to manage and review large volumes of clients' electronic documents. Due to the volume of material and the deadlines involved, this activity is highly suitable to be project-managed, with the goal being to reduce costs but maintain a high level of accurate document review.

- **IT projects / library catalogue integration**: For larger law firms, there will be any number of internal projects suitable to be project-managed in a formal way. These can range from IT projects (such as the selection and implementation of a new financial accounting system) to a project to integrate library catalogues across offices. Just as it is in the client's interests to have its matters managed cost-effectively, so is it in the interest of the firm to manage its own large projects cost-effectively. In fact, in many law firms, it is often the IT Department who already have a fair degree of project management experience since they have often been doing project management for their own projects for rollouts, updates and other processes dating back for a number of years.

- **Project Management Software**: There is an endless supply of software options to manage projects.[27] Because of the vast array – ranging from the simple, such as an Excel spreadsheet, to the complex, such as Microsoft Project (or simpler software such as Basecamp or Onit Legal Edition), it sometimes helps to keep in mind that the building of the Great Pyramid of Cheops in Egypt and the Great Wall of China both happened without the advent of any project management software.[28] Simply put, software alone will not make effective project managers out of lawyers since there is an important "people" aspect in working with others and effectively delegating and supervising team members.

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[27] The Wikipedia entry for "Comparison of Project Management Software" lists over 120 software titles – see Wikipedia contributors, "Project Management Software," *Wikipedia, the Free Encyclopedia*, *http://en.wikipedia.org/wiki/Comparison_of_project_management_software* (accessed 26 April 2010).
[28] See, Steven B Levy, "What Do They Have in Common?" *Lexician* (blog) (8 February 2011), *http://lexician.com/lexblog/2011/02/what-do-they-have-in-common/*.

3.   The role of law librarians in legal project management

From these various examples of project management initiatives that law firms are undertaking, we can look to identify where law librarians can play a role. However, before discussing that, let's first look at why law librarians should get involved with project management. There are in fact several reasons why I am advocating a role for law librarians:

- **Client-facing**: By its very nature, legal project management is client-facing and of utmost importance to the management in most law firms. As such, by positioning yourself to support legal project management initiatives, you raise the profile of your staff and department and exhibit an entrepreneurial spirit not always associated with the Library Department.

- **Information-intensive**: As seen above, many elements of legal project management involve the control and organization of information through the use of software and systems and an understanding of information management, all areas at the heart of law librarianship expertise.

- **Research / Precedent overlap**: To the extent that I equate knowledge management and law librarianship as part and parcel of the same activity, and since there are important knowledge management aspects of legal project management, law librarians should be well poised to support legal project management through research, precedents, and other knowledge management activities.

If the case can therefore be made above that law librarians should be involved in legal project management, what then are some of the specific activities law librarians can be doing? Set out below are eight such activities where I see a role for law librarians in legal project management:

1. **Education / Current Awareness**: To the extent your firm may be in the early stages of formally adopting legal project management into the daily workflow of the firm, an obvious starting part for law-librarian-involvement in legal project management is to monitor and acquire relevant literature and provide legal project management current awareness to the firm's management or the other persons involved in the firm's project management initiatives. At the end of this paper is a list of some of the key books, articles and blogs relating to legal project management that would help support your firm's initiatives.

2. **RFPs**: Most law firms will readily admit that the process for RFPs (or Requests for Proposals) when bidding on work for clients is often more chaotic than it needs to be. In many situations, lawyers are often too busy to spend much time tracking down the information needed to bid on new work. By working with lawyers and the Marketing Department, law librarians are often in a good position to help harvest, organize and manage the firm's RFPs and to recycle information from past RFPs when bidding on new work. Increasingly, many clients will require law firms to include their legal project management and knowledge management capabilities in the RFP documentation the firm submits to get that client's work. To the extent that this is client-facing work, it can be strategic for the Library and Knowledge Management department to get involved.

3. **Checklists**: Almost every large project for a client – whether a major lawsuit or a large "deal" – will involve multiple steps or stages that will benefit from a managed approach, whether previously "broken down" in a formal way (through "work breakdown structure" described above) or mapped out fresh for the particular matter. The Library and Knowledge Management Department is the natural "keeper" of checklists and other "best practices" documents.[29] Work with

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[29] For a good overview on the importance of checklists, see Atul Gawande, *The Checklist Manifesto: How to Get Things Right* (New York: Metropolitan Books, 2010). In addition, the Law Society of British Columbia has a nice collection of free, online checklists covering a variety of legal transactions that can be adapted for use for your firm's own internal checklists or process-mapping – see: Law Society of British

your practice groups in harvesting, annotating, organizing and updates the checklists they use for large deals.

4. **Precedents / Research**: Ideally, for large projects that the firm does repeatedly (such as trade-mark applications, the share-purchase of a business, or defence of motor-vehicle accidents), your checklists or project tasks will be annotated with the key documents that are used for each step, accessible by clicking on a link to the relevant documents embedded in the task list. Stated differently, an ideal practice is to build precedents into your project task lists. This saves times for lawyers, helps ensure consistency and quality control, and will lead to cost-savings in the long run.

5. **LPM Software / Training**: Within the law firm – as between busy practicing lawyers and over-worked Technology staff – law librarians are often well poised to evaluate and recommend legal project management software and be involved in the firm's training programs for legal project management.

6. **E-discovery support:** With the recent introduction of mandatory e-discovery procedures in most Canadian jurisdictions, there is an opportunity for the Library and Knowledge Management Department to support this still relatively unchartered territory. To the extent that the e-discovery involved in most large lawsuits involves multiple steps and a large body of documents, e-discovery will benefit from the structure imposed by legal project management principles.[30] Law librarians will often be the persons within the law firm who have the most expertise when it comes to full-text searching and evaluating the various search systems that law firms may wish to consider when conducting e-discovery "search" when looking for the "smoking gun" within a large body of documents.

Columbia, "Practice Checklist Manual," available online: *http://www.lawsociety.bc.ca/page.cfm? cid=359&t=Checklist-Manual* (accessed 26 April 2010).
[30] See, for example, Ashish Prasad, "Effective Project Management In Discovery" (2009) 20 Prac. Litigator 15.

7. **Post-deal reviews**: An important aspect of legal project management briefly discussed earlier is the need for follow-up: how well did the firm do in sticking to the plan? How did the client perceive the work done by the firm? Unfortunately, the reality in many situations is that both the firm and the client may be too busy to conduct this follow-up. However, in many situations clients will appreciate the opportunity to provide feedback and the information gathered can be invaluable in helping to avoid past mistakes on or leverage best practices for future transactions. Since the lawyers at the firm will often already be moving on to the next deal, there is an opportunity for law librarians to wear their knowledge management hats to sit on project management teams and help coordinate post-deal reviews, whether in person or through the use of online surveys with the client.

8. **Internal administrative projects:** Although legal project management is most often discussed in the context of client-facing initiatives, realize that the principles of project management apply equally well to large internal administrative projects. Such projects can include a wide variety of activities, ranging from the adoption of a new document management system[31] to figuring out improved work flow processes for vacation requests or expense reimbursement forms. Or more direct: the task of moving a law library print collection is ripe to be formally managed as a project. To the extent that many of these administrative projects involve software components or relate to the way firm members interact with the document management or other systems, law librarians will often have useful skills to bring to such internal projects.

Although some may cynically regard the recent interest in legal project management as a fad, it is likely instead reasonable to see this interest as reflecting a new reality where clients will be looking for greater transparency and certainty in how their outside law firms price their services. As such, expect to see a continued interest in this topic. While law librarians are not necessarily heavily utilized in project management in most firms, I

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[31] See, for example, Anastasia Govan, "Project Management Methodology for Implementing an Electronic Document, Library, Knowledge or Records Management System" (2010) 18(3) Australian Law Librarian 219.

think this represents a missed opportunity for both the firm/client and the librarian. While in many situations it will be the lead lawyer who will be responsible for implementing legal project management initiatives on client files, I have tried to identify several areas where law librarians can be leveraging their expertise to get involved with project management. These areas include education and current awareness, helping with the bidding or RFP process, maintaining checklists, providing research and precedents (ideally embedded within project task lists), evaluating and using project management software, providing e-discovery support, helping with post-deal reviews, and lending support on large, internal administrative projects.

Resources on Legal Project Management

Books

Gawande, Atul. *The Checklist Manifesto: How to Get Things Right*. New York: Metropolitan Books, 2010.

Hassett, Jim. *The Legal Project Management Quick Reference Guide: Tools and Templates to Increase Efficiency*. 2d ed. Boston, MA: LegalBizDev, 2011.

Hassett, Jim. *The LegalBizDev Survey of Alternative Fees* (2010). Available online for purchase, *http://www.legalbizdev.com/survey/*.

Lamb, Patrick J. *Alternative Fee Arrangements: Value Fees and the Changing Legal Market*. London, UK: Ark Group, 2010.

Levy, Stephen B. *Legal Project Management: Control Costs, Meet Schedules, Manage Risks, and Maintain Sanity*. Seattle, WA: DayPack Books, 2009.

Project Management Institute. *A Guide to the Project Management Body of Knowledge (PMBOK Guide)*. 4th ed. Newtown Square, PA: Project Management Institute, 2008.

Susskind, Richard. *End of Lawyers? Rethinking the Nature of Legal Services*. Oxford: Oxford University Press, 2008.

Articles / Blog Posts

Allan, Barbara. "Juggling with Fast and Slow Time: Some of the Challenges of Project Management" (2006) 6 Legal Info Mgmt 251.

Anzalone, Filippa Marullo. "Project Management: A Technique for Coping with Change" (2000) 92 Law Lib. Jounral 53.

Association of Corporate Counsel. *ACC Value Challenge*. Available online: *http://www.acc.com/valuechallenge/index.cfm*.

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