

Alternative Rocks!

Non-Traditional Approaches
to Legal Project Management

#INFO8

Before We Begin:
What's your experience with Agile LPM?

- Scrum or Agile certified?
- Does your Development team practice Agile?
- Anyone else in your organization practice Agile?
- Have an LPM initiative underway?

Go to <http://ilta.cnf.io> on your mobile device or laptop.



Our Panelists

Kim Craig

Director of Legal Project Management Office
SeyfarthLean Client Solutions Group
Seyfarth Shaw LLP

Andrew Terrett

BLG Adroit: Lean PM National Co-Leader
Borden Ladner Gervais LLP

David Rueff

Shareholder / Legal Project Management Officer
Baker Donelson Bearman Caldwell & Berkowitz, PC

**Moderated by Suzanne Wood, National Director of LPM
at Norton Rose Fulbright Canada LLP**



SeyfarthLean

- Seyfarth Shaw - 800+ lawyers, 14 U.S. and international offices, “full-service” firm, 5 practice departments
- SeyfarthLean - Rethinking Legal Service Delivery with Lean Six Sigma since 2005
 - Voice of Client
 - Legal project management
 - Process management
 - Innovative client-facing technologies
 - Knowledge management
 - Data metrics and analytics
 - Continuous Improvement

Seyfarth's Legal Project Management Office

- Team of 18 billable, full-time, client-facing project management individuals
- Original PMO founded in 2004
- Client-facing since 2008
- Multi-disciplined team
 - Certified Project Management Professionals
 - Six Sigma Green or Yellow Belts
 - Certified Scrum Masters or Agile Certified
- Diverse backgrounds
 - Technologists
 - Business operations
 - Legal and non-legal experience

BLG Adroit

- BLG - 700+ professionals, 6 offices in Canada, "full-service" firm (12 practice groups)
- BLG Adroit - two leaders - Patricia Olah, Andrew Terrett
 - Project Management and Process Improvement (Lean Six Sigma)
 - Launched in 2011
 - Process Improvement - consultancy approach
 - Project Management - tools, PM handbook, support where requested but not "management"

BakerManage

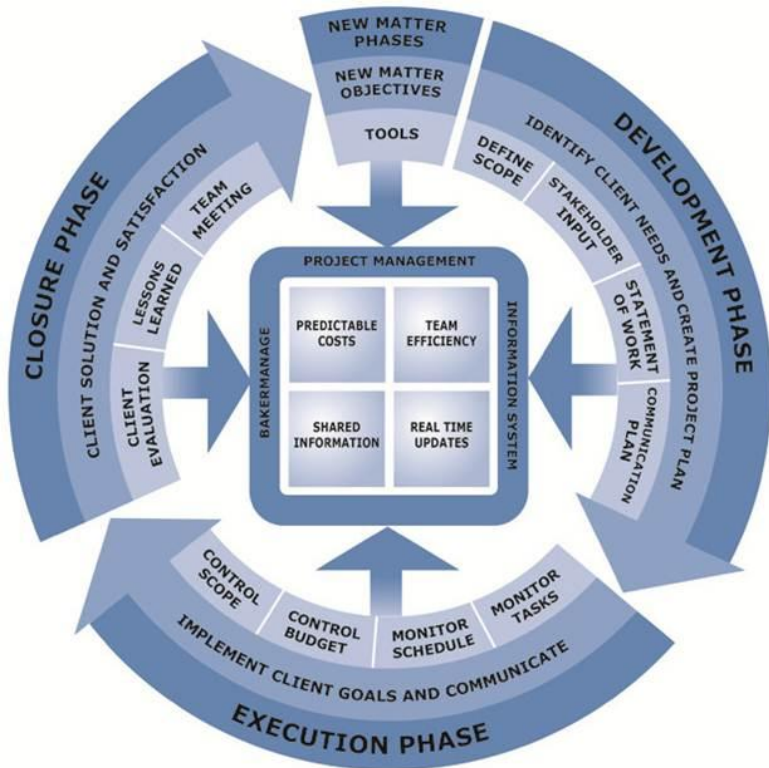
Baker Donelson Bearman Caldwell & Berkowitz, PC

- 650 attorneys and policy advisors in 19 offices
- Ranked 72nd largest law firm in *National Law Journal*

Baker's Legal Project Management Office (LPMO)

- LPM and consulting for Value Based Fees, eDiscovery, Litigation Support and Contract Counsel
- 11 attorneys / paraprofessionals - PMP and Six Sigma certified - billable and non-billable team members
- LPM support and BakerManage not charged to the client
- IT and technologists support implementation

BakerManage



- Specialized workflow drawing upon waterfall PM, but based upon the way legal teams actually work
- Patent pending process communicates with Firm systems
- Firm won the International ILTA Project of the Year award in August 2012.

What is Agile?



SeyfarthLean Agile LPM Manifesto

- Our highest priority is to delight the client through early and continuous delivery of valuable solutions that meet or exceed their needs and/or solves problems.
- The best solutions and improvements emerge from carefully examining the Voice of the Client (VOC).
- Welcome changing or evolving needs throughout the project. Agile processes harness change for the client's competitive advantage.
- We aim to deliver solutions and/or improvements frequently, from daily incremental improvements, to weekly or monthly, with a preference to the shorter timescale.
- Business people, legal resources and the client must work together throughout the project.
- Our teams deliver projects through motivated individuals. Give them the environment, tools and support they need and trust them to get the job done.
- Client engagement and feedback is the primary measure of progress.
- Continuous attention to excellence and client satisfaction enhances agility.
- At regular intervals, the team reflects on how to become more effective (through the use of lessons learned) then tunes and adjusts its behavior accordingly.

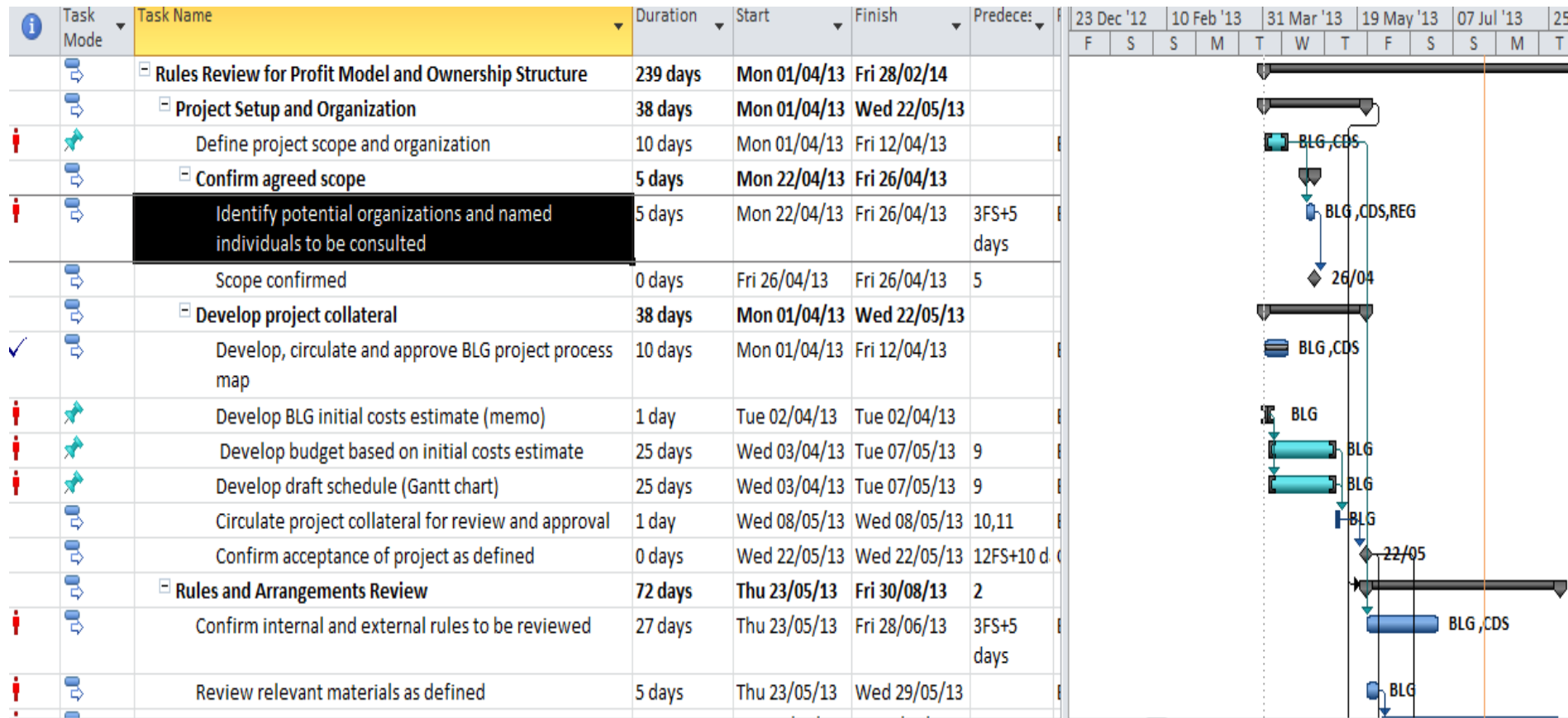
What's Wrong with PMBOK?



Not too much!

- Most components of PMBOK - scope (management, scope change management), budgeting and budget management still make sense in Legal.
- Scheduling is a key challenge.

"No plan withstands engagement with the enemy"



They want simpler "scheduling" tools like this...

OUR FIRST BOARD

Backlog Board

THINGS WE'LL DO SOON 6

THINGS WE'RE ACTIVELY WORKING ON

READY FOR DELIVERY

Work Assigned to Joe's Team

Figuring Out The Requirements		Executing On Our Plan		Verifying That We Did It Right	
Doing	Done	Doing	Done	Doing	Done
I can't explain this request properly but I'll know it when I see it		Plan for the department holiday party		A red lane shows you exceeded your "WIP" limit. Mouse over the "!" by the red 2 to learn more	

Work Assigned to Mary's Team

Figuring Out The Requirements		Executing On Our Plan		Verifying That We Did It Right	
Doing	Done	Doing	Done	Doing	Done
LeanKit tracks every card change & move to provide an audit trail & analytics. (more ...)				Move the team to the new office	

Work Assigned to Nigel's Team

Figuring Out The Requirements		Executing On Our Plan		Verifying That We Did It Right	
Doing	Done	Doing	Done	Doing	Done
The copy machine is broken! We need to fix it. And we're late in getting it done!				Write an instructions manual for Product X	

Callouts:

- A complicated report that nobody quite understands but we've been told we have to prepare
- Create a new budget for Project "Betty" before the next customer review meeting
- Figure out how to manage our new performance review process
- 124345: A vertical column or horizontal row usually represents a step in your process
- Cards represent work your team needs to do. Double click to open and learn (more ...)
- Gather the info for the big boss's presentation to the board
- A really complicated thing that's probably biting off more than we can chew
- Analyze the results of the test we ran on the version of product

Agile Legal Project Management

- Agile Project Management is an iterative method for determining requirements, creating design and executing on a project
- Approach best suited for complex efforts
- Continuous evolution and growth are key
- Some attributes include:
 - Self-organizing teams
 - Bite-sized chunks of work
 - Work re-prioritized weekly to better respond to new ideas and changing needs
 - Regular communication between team members

What We've Learned...

- PMBOK is perceived as too much - "bureaucracy," "busy-work," and formality but most core concepts of PMBOK (scope, budget, communication, quality, risk) still make sense. Scheduling is the most challenging area.
- One size doesn't fit all! You have to understand the work and start from where the lawyer sits.
- A small amount of PM is better than no PM!

Discussion

