

PRACTICE POINTS

A Quick Guide to Legal Project Management in Litigation

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By Sarah Horstmann and Jill Sonnesyn – August 23, 2022

Litigation is notoriously unpredictable, but effective matter management can minimize unpredictability and improve results for lawyers and clients. Law firms are increasingly relying on Legal Project Management (LPM) to manage litigation matters. LPM takes general project management methodologies and applies them to legal work.

Phases of LPM

LPM can be customized to fit virtually any litigation matter. The general phases of LPM listed below can be applied as needed, and not every matter will require a deep dive into each phase or the exercises or deliverables that fall under each.

Initiating

Begin by scoping the project to define the services relevant for the matter according to the client's expectations and any relevant Outside Counsel Guidelines. Include a description of the matter, objectives, success factors, key deliverables, and what is in and out of scope.

Planning

Develop the project plan, timeline, budget, and other supporting documents.

- **Schedule and Resource Management:** Prepare a schedule, identify anticipated deliverables, and select the key team members who will be performing the work. It may be helpful to refer to the [ABA Uniform Task-Based Management System Litigation Code Set](#) when establishing the schedule.
- **Budget:** Use the Schedule and Resource Management plan to build the budget. Or start with the [ABA Litigation Code Set Sample Budget Format](#).
- **Communication Plan:** Develop a plan identifying who will communicate what (deliverable), when (frequency), how (medium: email, phone, etc.) to whom (recipient).
- **Change Management Plan:** Develop a plan for managing out-of-scope items, should they arise. This includes changes in the matter that affect the budget, schedule, or client expectations.

- **Risk Management Plan:** Assess the various risks or uncertainties that could affect expectations or outcomes and develop a plan for addressing them.

Executing and Monitoring

Execute the schedule and manage the team, while monitoring budget and scope. Consider regular matter updates, progress reports, or check-in calls with the legal team and/or client for progress reporting, including reviewing budget status, deadlines, deliverables, and any changes in scope.

Evaluating

Consider a debrief meeting with the legal team and client to evaluate the matter and discuss lessons learned. Capture knowledge by identifying model documents, best practices, and templates for re-use with similar matters.

At the completion of each litigation matter, a firm can review the benefits of incorporating LPM practices into the matter and grow its LPM program from there.

Advantages of LPM to Lawyers and Clients

LPM provides significant advantages to lawyers and clients, including:

- **Enhanced Communication.** LPM helps ensure that the legal team and client have a mutual understanding of expectations while limiting surprises. LPM also helps establish agreed-on methods of communication and engagement by stakeholders, enhances teamwork, and establishes clear lines of communication so that team members are equally informed.
- **Improved Profitability.** LPM promotes effective matter management, reducing write-offs or write-downs.
- **Efficient Allocation of Resources.** LPM encourages assembly of the right team for the matter based on scope and helps provide effective training opportunities for newer lawyers while allowing more time for esteemed advice.
- **Client Satisfaction.** LPM allows matters to stay on budget and on schedule and produce quality legal work.

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