

Project Management for Lawyers

By Cherisse Mastry Patton*

All attorneys (whether litigators, transactional associates, or in-house counsel) must contend with deadlines and time management issues. One solution to the time crunch is to utilize project management concepts within the legal environment in order to streamline daily activities. Project management involves the coordination of multiple tasks to achieve a discrete outcome. Projects can be large (responding to discovery requests on a commercial litigation case) or small (preparing a brochure to highlight the basics of usury law for consumer clients). Whether large or small, all projects have the same general elements: (1) Project Plan, (2) People, (3) Tools, and (4) Execution. Knowing how to maximize these elements can mean the difference between chaos and success.

The first step toward successful project management is the **Project Plan**. Developing a project plan involves outlining all deadlines and tasks that need to be completed in order to achieve the desired outcome. Tasks are then expanded to include individual action items or sub-tasks. This is essentially a flow chart of responsibilities. (A sample breakdown is provided below.) The project plan should also include contingencies in case one or more tasks fall behind schedule or cannot be completed due to budgetary or timing constraints.

There are a number of **Tools** that can be used to help with the creation of a project plan, such as sample timelines, expanded flow charts, and detailed checklists. These are available through project management books, online resources, and software. Many excellent resources exist to help the novice project manager develop organized, effective project plans, and I have listed my favorites in the references section below.

After the project plan has been created, each task and sub-task should be assigned to one or more of the available **People** (paralegals, assistants, and/or associates). If more than one person is assigned to a task, designate one specific person to take primary responsibility for completion.

Execution of the project plan is where the battle is won or lost. Effective execution of a project plan requires diligently following-up with the assigned people through status updates tailored to the size and scope of the project. If the project is relatively small-scale and straightforward, status updates may be accomplished through brief emails and quick phone calls. If the project is large and complex, detailed memos and longer, more structured meetings may be necessary.

Implementing project management techniques in legal practice requires additional time and energy up front, but it will be well worth the effort in the long run. Once a detailed project plan has been developed for one project, one can easily reorganize the process flow to accommodate other projects as they arise.

Sample Breakdown of Tasks and Sub-Tasks:

Document Discovery Project Plan: Respond to Discovery Requests by 07/15

Task: Review files to determine what has already been received from client

Responsible Person(s): Associate 1 (primary), Paralegal 1 by 05/21

Sub-Task: Review paper file and prepare report for Associate 1

Responsible Person(s): Paralegal 1 by 05/07

Sub-Task: Review electronic files

Responsible Person(s): Associate 1 by 05/14

Sub-Task: Prepare memo summarizing findings from paper files and electronic files

Responsible Person(s): Associate 1 by 05/21

References:

ERIC VERZUH, *THE FAST FORWARD MBA IN PROJECT MANAGEMENT: QUICK TIPS, SPEEDY SOLUTIONS, CUTTING-EDGE IDEAS* (John Wiley & Sons 2005)

Project Connections.com: Know-how for People Managing Projects and Teams, <http://www.projectconnections.com>.

ConceptDraw, <http://www.conceptdraw.com/en/>.

*Cherisse Mastry Patton received her J.D. from the University of Houston Law Center. She currently works as in-house counsel and uses project management techniques to manage her workload.

