

# Law Firm Case Study

## The Challenge

Squire Sanders LLP contracted Greg Kaple early in the evolutionary trend of law firm's considering to make use of legal project management and process improvement. With multiple locations and practices in the world, the firm has been experiencing the business and economic trends worldwide. Corporate counsel budget tightening, new value seeking, increased competitiveness, and efficiency demands from clients are just some of the new landscape their attorneys are facing every day.

In response to external pressures for innovation in Firm practice (ACC Value Challenge among them) and internal pressures to drive their own value initiatives, this Firm seized the chance for change. In uncertainty lies opportunity and this firm responded with awareness, strength and direction. By engaging Greg's leadership and network of experts, the Firm was not only embracing an understanding of matter management and process improvement but also had already begun communicating and practicing the principles in the highest impact areas such as litigation and transactions.

## Project Drivers and Initial Engagement

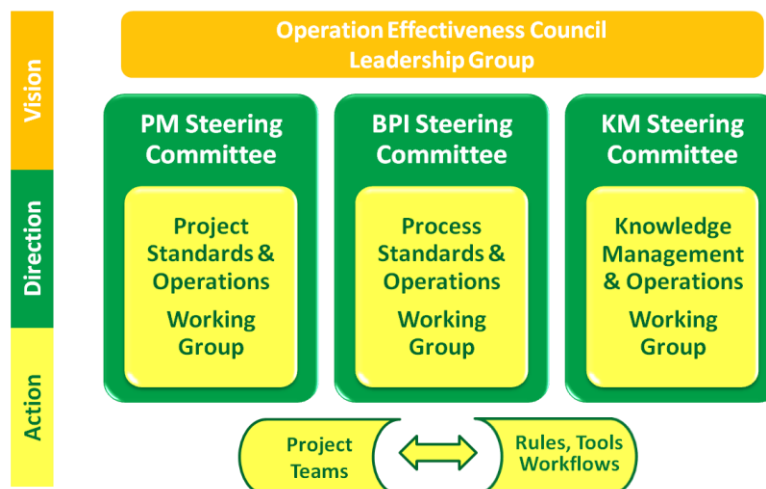
The Firm's strategic initiatives included a deliberate and tactical evaluation of "how" they were running their business. The Firm's leadership was beginning to feel that leveraging common business practices such as Project Management (PM) and Business Process Improvement (BPI) in the "business" of law could yield great returns for not only increasing their competitive advantage and profitability but also expanding their brand and reputation as leaders in the field of law.

The initial engagement involved helping the management team raise partner and leadership awareness of what PM and BPI meant for law firms and how these concepts could integrate into their firm. Greg and his team customized and delivered an interactive workshop of definitions, questions, explanations and demonstrations on the scope of topics within PM and BPI. This workshop was first delivered to the management committee and then expanded to the annual partnership retreat to provide a common language and motivation throughout the firm.

## Program Deliverable

Following these strategic training and communication initiatives, Greg and his team lead the firm through planning, building and rolling out the foundations for an effective program of project management and process improvement. A Performance Management Organization was formed to align the management and resources responsible for promoting, developing and training on PM and BPI practices throughout the firm. Setting up such a program within an existing Firm requires a great deal of cultural sensitivity, customization and attention to current processes, pressures and teams.

## Performance Management Organization



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Steering Committees promoted, developed, trained, and directed activities for each area of PM, BPI and KM across the Firm. Greg and his team helped adapt standard PM and BPI practices to fit the Firm's culture and objectives establishing:

- PM and BPI Governance Procedures
- Communications Patterns and Hierarchies
- Training Curriculum and Document Frameworks
- Pilot Projects and Basic Metrics
- Guidelines for future development

As part of the program's long term sustainability, Greg and his team lead the search for a permanent Director of Project Management and Process Improvement. The engagement concluded with the successful engagement of an elite professional as the new Director together with a thorough transfer of knowledge and on-boarding support.

## Results

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The only way law firms can remain competitive in this transformational legal environment is to be adaptable and nimble. This Firm's lawyers and management were able to adopt PM and BPI practices that have helped them respond to RFPs and arrange AFA's, thereby strengthening their reputation and increasing their efficiency and speed on project work by 125%. AFA's account for 11% of AmLaw 100 Firms revenue last year and are predicted to increase by an additional 15% over the next 5 years amounting to an estimated \$17 billion in revenue. How valuable can PM and BPI be to your firm?

## Afterword

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Since completing this initial engagement, Greg has stayed actively involved in supporting the Director of Value and Project Management for the firm. During that time (nearly 3 years), he and the firm have been leaders in the legal industry at recognizing the importance of LPM to marketing and business development. Greg has leverage much of his business development and commercialization expertise to help the firm identify the right role for LPM in proposal creation and pricing, the first elements of project creation that eventually dictate project budgets and resource management. Today, an increasing number of firms are recognizing this integral trinity between business development, pricing and project management delivery, something Greg is uniquely attuned to deliver.

## Other LPM Experience

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**NYC Wall St Firm** – Transaction Business Process Improvement, Career Attorney Role Creation, Customized Project Management Principles into the Firm's methodology for Matter Management

**Boston/DC International Law Firm** – Back Office Services National Location Insourcing, Emergency Management Team Business Continuity Training, Customized Case Management Approach from Legal Project Management Techniques

**Boston International Law Firm** – Expertise database and workflow, litigation taxonomy and workflow, business intake and litigation matter management methodology derived from project management principles

**Atlanta National Law Firm** – Practice management program development and implementation based on legal project management, Custom unique differentiation for litigation project management development

**Houston Regional Law Firm** – New Business Intake, Pricing and Legal Project Management Program

**New York International Financial Services** – Inside counsel engagement, instituting legal project management principles for internal work and working with outside counsel

**Pennsylvania International Flooring Manufacturer** – Inside counsel engagement, instituting legal project management principles for internal work and working with outside counsel