# PUBLICATION

## BakerManage: Legal Project Management

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Following the lead of the Association of Corporate Counsel's Value Challenge, Baker Donelson clients are continually looking for ways to reconnect value with the cost of legal services. In response to this need, Baker Donelson is one of the first firms in the United States to invest in the development of its own Legal Project Management (LPM) system — **BakerManage**. The system is an industry leading and patent pending system which can be implemented in any type of engagement — business or litigation. The adoption of a legal project management approach represents a commitment by Baker Donelson to our clients that we will be good stewards of their resources regardless of the fee arrangement.

Baker Donelson also formed a Legal Project Management Office (LPMO) to provide support for the BakerManage system and guide the implementation of project management principles across the Firm. In 2011, the Firm offered training to select client teams and is currently implementing the system in hundreds of cases. The LPMO assists attorneys with the design and implementation of a project management system for the type of engagement. In addition to project management, the LPMO also provides consulting for alternative fee evaluation, litigation and trial support, document review and e-discovery processes and software applications.

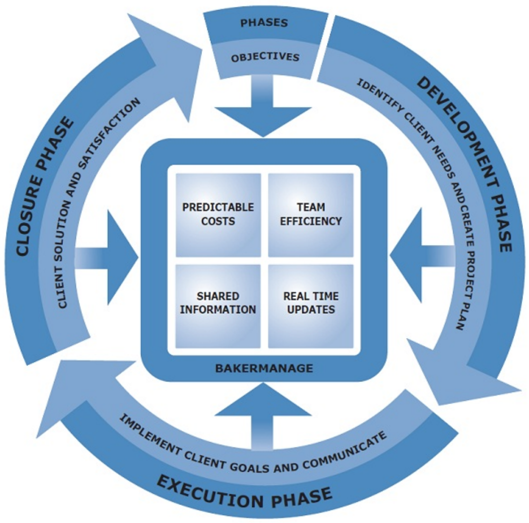
**What is legal project management, and how can it help?**

BakerManage draws upon traditional project management principles in order to control those aspects of the practice of law which result in unexpected increases in costs and client dissatisfaction. These issues can be caused on the client side by authorizing work prior to clearly identifying expectations, and on the law firm side by lack of planning and communication. BakerManage helps to limit these occurrences by providing a project management workflow for both attorneys and clients. BakerManage is designed to be very flexible and is not a "one size fits all" proposition. The tools available in BakerManage can be implemented at any level depending on the information available, the nature of the matter and the timeframe involved.

BakerManage compliments the legal experience of our attorneys by assembling project information (such as scope, tasks, schedules, deadlines, budgets and performance) in one location and sharing that information in real time with the team and the client. The goals of BakerManage are:

- Evaluate legal processes across the Firm to create guidelines for attorneys which promote consistency, encourage appropriate resource assignment, omit duplication and streamline delivery.
- Prior to the engagement of the legal team, request that the client clarify and define the scope of the engagement in order to ensure that the legal services are tailored for the client's business need and are provided at a predictable cost.
- Provide attorneys with the tools to implement the approved legal project plan and to monitor the efficiency of the legal team.
- Provide attorneys with tools which promote improved communication between the legal team and the client.
- Provide clients with customized reporting of real time performance metrics.

BakerManage is a uniquely designed process which is supported by software applications such as SharePoint and the Firm's time entry and financial reporting systems. The workflow divides the management of a legal matter into three phases: the Project Development Phase, the Project Execution Phase and the Project Closure Phase.




The following is a brief overview of these phases.

**Project Development Phase**

The goal of the Project Development Phase is to clearly identify the scope of the matter, which will be used to engineer a project task list, schedule, budget and communications plan. The first step is an initial Client meeting to identify the business need and to clarify the role of Baker Donelson — i.e., what is in and what is out of scope. The key is collaboration with the client to identify critical information which will be used to develop the project plan. In addition to the scope, attorneys are encouraged to identify other potential stakeholders, the background facts, obtain any supporting documents and develop a summary statement of the Client's expectations. The information gathered at this stage is used to populate a project matter website and to develop a statement of work which includes assumptions, risks and firm resource allocations. Attorneys are also encouraged to develop a communication plan for the engagement to schedule regular communications among team members and with the Client to confirm expectations and report results.

Once the client confirms that the statement of work is consistent with expectations, the next step of this Phase is the development of a project task list or process map. This resource serves as a guideline for management and elaborates all of the assignments necessary to complete the engagement. The list of tasks can also be tied to billing codes such as the ABA Uniform Task Based Management System or firm specific coding. Coding allows both attorneys and clients to monitor specific segments of work and to quickly identify the status of the matter. Tasks are then used to develop a schedule, assign distinct tasks to individual team members, to set deadlines for completion and to identify external deadlines for court filings or contractual obligations. The tasks can also be tied to a project budget which provides the client and the legal team with estimated times for completion of the tasks.

**Project Execution Phase**

The primary goal of the Project Execution Phase is to control the scope of the engagement and to regularly communicate with the client regarding matter status or if there are changes in the original plan. Additionally, managing attorneys are provided with the necessary tools to confirm that tasks are on schedule, to ensure that team members are operating consistently within the approved budget and to implement regular communications with the team and the Client. Team members are required to regularly update the BakerManage schedule with statuses related to their assignments. Team members are also required to enter time on a daily basis in order to provide real time information on budget status. Communication tools such as journals, blogs, client extranets and scheduled reporting can also be implemented in BakerManage.

**Project Closure Phase**

The goal of the Project Closure Phase is to capitalize upon the legal team's experience managing the engagement for the client. The BakerManage process provides a formalized mechanism for capturing improvements to firm resources which can be used to streamline future representation for the client. BakerManage incorporates the creation of a lessons- learned log which is made available to all team members in order to record recommended modifications to form documents, ideas for improving procedures, updates to checklists and templates, and client-requested changes for future matters. Once a matter is completed, the Baker Donelson team meets with the client to review the lessons- learned log and confirm the recommended changes. This is followed up with a client evaluation which captures the client's impressions of the legal team's performance. Finally, the Baker Donelson team reviews the evaluation as a group and implements the changes for future engagements.