

Business & Careers

Specialty in project management could open more doors



Luigi Benetton
Hi-Tech

Project management as a practice hasn't yet caught on with lawyers the way it has in other industries, if Rachael Chadwick's experience is any indication.

Chadwick obtained her project management professional (PMP) certification from the Project Management Institute several years ago. "I found the exam tough, mainly because it had nothing to do with legal," Chadwick recalled, noting that it touched on areas like construction and IT. "The concepts are not new, but applying them to differ-



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Dominic Jaar
KPMG Canada

ent industries was completely new to me," said the senior e-discovery analyst and project manager for information management consultancy Wortzmanns.

The certification still doesn't cater to the legal industry today. "As a PMP, I need to maintain a certain level of 'credits' (called PDUs — professional development units). [That] can some-

times be challenging when much of PM is focused on manufacturing, software, healthcare, etc. — not legal," she wrote in an e-mail.

"I can go to a three-day conference relating to e-discovery, but I cannot use any of the

time/sessions towards my PDU requirements because they are not specific to PM."

Chadwick's interest in the PMP field rarely spreads to lawyers like David Cohen. "I would focus on legal process training," said the leader of McCarthy

Tétrault's client service innovation group. "There hasn't been a huge market for that."

Chadwick looks forward to having this change. "I understand a lawyer's point that every project, every matter is unique," she said, "but certain repeatable processes are done every single time, and that's where project management comes into play."

Project management may be the best route to creating fixed fees for legal services. For instance, the process enables firms to differentiate core legal work versus non-legal work that can be delegated to other resources offering different skills and lower rates. "Unless you can break a standard engagement in pieces, you can't do this type of quote," said Dominic Jaar.

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Business & Careers

Benefits: Good managers lessen a lawyer's workload

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"Leveraging analytics, you can optimize delivery of different types of engagements," added Jaar, partner and national leader in information management and e-discovery for KPMG Canada.

When broken out as a distinct part of a lawyer's workday, project management can be seen as a burden. It shouldn't be.

"A lot of it is common sense," Chadwick said. "You're probably doing it already." She encouraged lawyers to formalize their efforts and look for gaps in their processes. "You don't need certification. If you have experience in the legal industry, you'll know what the end result should be."

There's a range of opinions on what software to use, but lawyers shouldn't get hung up on technology. "Excel is my go-to," said Chadwick, who extolled the virtues of checklists and spreadsheets. "I have Microsoft Project, and I've been trained on it, but not all clients have it, so it's harder to share my documents with them. I don't want to get bogged down with technology, and if clients don't use it, I use Excel so we can work on things collaboratively."

Cohen uses an Excel-based system that's served McCarthy Tétrault since before he joined the firm, though he admitted the firm is shopping for another system. A client dashboard is high on its shopping list. So is the flexibility to account for any type of legal matter it handles, from small, simple matters to massive matters that involve various practice groups. "Not all tools allow for that easily," he said.

At the time we spoke for this article, Jaar had 117 projects under his auspices. He tracks resources and other information using a system called Retain.

"I've been using Microsoft Project for years," Jaar added. "I like how it's structured and forces you to think, at the outset, about your project. That's something we don't do naturally. We see the end result we want to achieve but we rarely take the time to map the path to get there."

"That could explain why lawyers are

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We are increasingly asked to project manage all matters for some of our larger institutional clients above a certain threshold (for example, matters where fees are projected to be in excess of \$50,000).

David Cohen
McCarthy Tétrault

not good with budgets, for instance, or delegating," he added.

Training in project management and related skills can certainly help, as would adding a project management course to law school curricula.

Could it make law school graduates more employable? "In some cases, it may become an alternative career for lawyers who decide to specialize in project management," Jaar suggested. "We see that in a number of other domains, engineering, IT, etc."

The combination of lawyer and project manager could result in a new line of business. "We are increasingly asked to project manage all matters for some of our larger institutional clients above a certain threshold (for example, matters where fees are projected to be in excess of \$50,000)," Cohen wrote in an e-mail.

For many lawyers, delegation of project management could be the best solution. Tasks — communications, tracking analytics and so forth — that they might see as tangential at best are part of the "actual job" for dedicated project management professionals like Chadwick.

Law firms are creating project management resources in-house. McCarthy Tétrault is one of these firms. Cohen, who did a joint law degree and MBA, leads McCarthy Tétrault's customer service

innovation group, which includes the dialogic project management subgroup to work on legal project management.

The group adds value by monitoring projects, including fees and how they track against budget. It also supports lawyers in conversations with clients when it becomes obvious that a project is out of scope or going over budget. "That's where lawyers appreciate help from us," Cohen said.

Like their competitors, McCarthy Tétrault isn't shy about letting the market know how his firm works. "We market not just our expertise in project management, but our work in service delivery and process efficiency generally," Cohen said. "Lawyers haven't been known for it and haven't done a good job with it historically."

"You don't see good project managers," Jaar said. "Not only do they not add to a lawyer's workload, good project managers reduce the amount of work lawyers need to do."

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