

Plan and prosper

Whether working on a short-term project or developing a long-term strategy, project planning is an essential skill in today's solicitors' toolkit, if anything because clients expect high standards and timely delivery, say **Sally Calverley** and **Mick Underhill**



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At a firm where heads of department were asked: "which areas of your business are ripe for consolidation?" the answer was unanimous: "every part - except mine!" It may seem strange to outsiders, but lawyers are often intrinsically opposed to process, to anything that suggests that their life's work can be reduced to a series of predictable events.

And yet, deep down, we know it can be. So why wait? With decent planning, law firms of all shapes and sizes could manage their resources better, keep costs down and improve revenue. Isn't that what law firms want? What's more, isn't that exactly why the new entrants to the legal services market are already doing it?

We aren't talking about expensive IT software or change management projects that take years to produce results. All law firms can benefit from using basic planning techniques and tools to improve results on individual cases. What's more, law firms can use these techniques and tools across teams and even departments to manage their resources, both people and assets.

More importantly our clients and customers demand of us a lean process; that we not only do it right – but do it right first time. To do that we need to provide an accurate response, so we need a good plan. In short a well-managed plan will allow you to forecast and mitigate risk on your particular project.

A good plan

Whether planning a single project or organisational strategy for your business, any plan is better than no plan at all, but every good plan must have:

- **A defined outcome.** What do you want to achieve? What is your mission statement? Setting a strategy of the future you want to create within your organisation will shape everything you do from this point on.

With a single project the outcome can be fairly straightforward. In case of a high level strategy we may not know what the outcome is at its conception and developing where we want to go will be first on the schedule of tasks.

- **Accurate research.** In the army there is a saying that time spent in reconnaissance is seldom wasted. There is no fundamental difference with business planning: get researching, gather historic data for similar matters, find as much information as possible. The more we know the easier it will be to formulate a plan as we have less time risk allowance to add.
- **Stakeholder ownership.** Managers have to take responsibility for their plan, make it personal to them and believe in the outcome. They have to be led by the certainty of its success rather than by driven by the fear of its possible failure. This is equally true of those delivering the plan and management responsible for the business strategy.
- **Adequate resource.** Senior management should check that the project is resourced with a good manager, a clear budget, sufficient staff to carry out the identified tasks or manage the supply chain, and enough time. Procrastination is the thief of time. Make sure the resources are in place before you launch the project and hit the ground running at the determined pace.

Schedule and milestones

Once we have defined the desired outcome we need to come up with a schedule of work and also key milestones. These will at least be the start and finish dates and also hold or escalation points where a decision is required by senior lawyer before work can continue. This might be as simple as a counterclaim being entered, or where a strategic decision will need to be made depending on circumstances that are unknown at the outset of the plan.



Once we have this schedule of work we can then apply a resource and cost to each task. Simply put, the finer and more granular the detail the more risk can be mitigated.

In the construction industry the plan is usually communicated via a Gantt chart. This is an effective method for communicating a plan but, more importantly, provides the brainpower for making the plan as efficient as possible with optimum use of resources.

A Gantt chart is a pictorial view of your project, each sub task represented by a bar and each then logic linked (see figure 1). Each subtask should have at least one predecessor and one successor. There are many providers of software to produce the Gantt chart, the one most people may have experience with being Microsoft Project (see figure 2). Producing a Gantt chart will require some prior learning – those with a logical bent will soon, however, pick it up.

However, don't be led by the bright lights and fancy functions of a computer. The problem with computer software is it can produce a complex plan easily and quickly. We therefore feel compelled to do just that, using all the functions and making the plan so complex it is impossible to manage. It is just as effective to produce a simple plan on a piece of paper with nothing more technical than a pencil and a ruler.

While on military operations in austere environments it was refreshing to return to first principles and fashion an engineering plan on the bonnet of the Land Rover.

Critical path

The most important thing the schedule of work or Gantt chart will show you is the critical path. The critical path is the longest combination of tasks to be completed in order from start to finish. Any delay to the critical path will affect your outcome. You will also be able to see at this point key factors

that might interrupt the critical path. This is the point to consider whether the plan needs amending:

Is the end date when you need it to be? The rate of completion along your critical path will determine the ultimate outcome date: if it is too late then you might need to consider additional resource or managing client expectations.

Where are the risk points and what can you do to mitigate them? At a firm planning level, this might be the point to look at cash flow or the need to move resources between departments. One of the benefits of using this planned approach is the realisation that although senior staff may need experience in a specific area, junior and clerical staff can cover all departments and move between them as the need arises, so reducing duplication of resource.

Constraints will affect not just the shape of your plan but also the risk profile. These will include such things as budget release dates, staff availability (for instance over holiday periods) and specific start and finish dates. Don't overlook them; they alone could determine the success of your project.

Optimising the programme of work will ensure effective use of the resources throughout the project life. You will want to aim for an even distribution of delivery staff and finances across the firm. Generally in construction projects the perfect finance load will be an S curve (slow start – pick up the pace and slowdown to a finish) whereas in the legal sector this isn't always ideal. In litigation and commercial teams there are usually points when considerably more resource is required than at others. By understanding the peaks and troughs across a department it will be easier to manage workflow and resources.

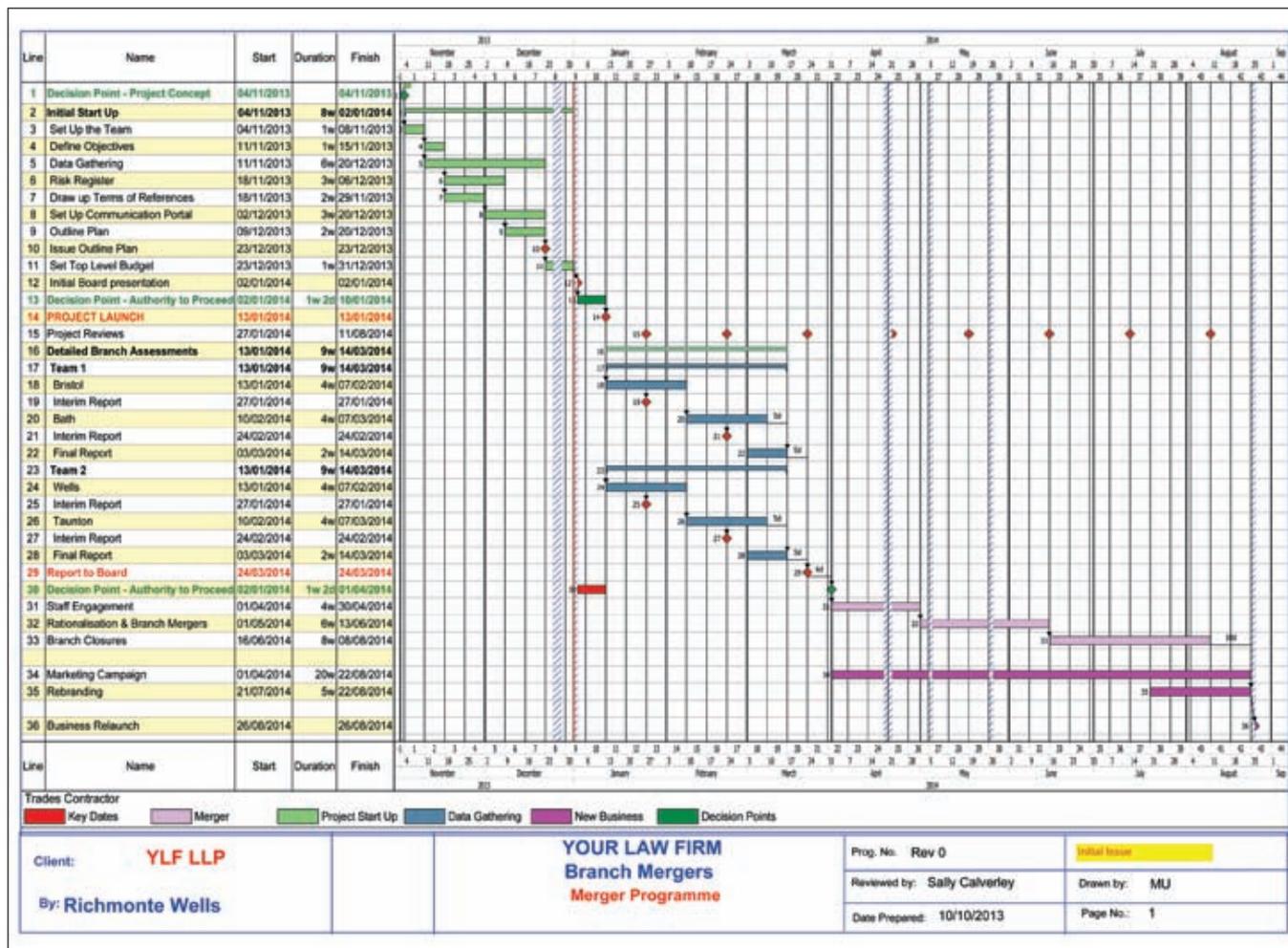
Project review

Once the plan becomes operational, it will require



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Figure 1: Gantt chart sample



constant updating to suit the unfolding situation. It maybe that we hit problems we didn't envisage and we are running behind expectation. Don't be afraid to change the plan, but don't change for the sake of it.

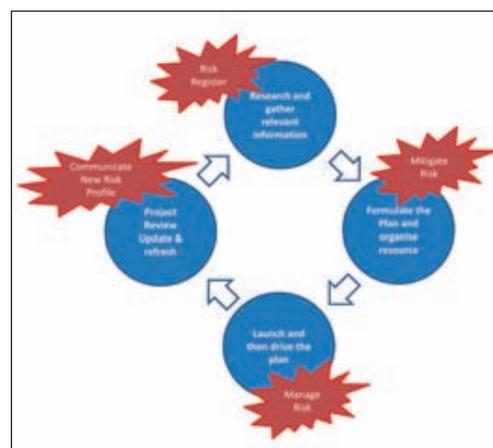
Review progress periodically, this could be weekly or even monthly depending on the intensity of the work. Compare the rate of progress to the Gantt chart, test the quality of the material being produced, assess the resource utilisation, compare forecast costs against actual costs, amend the plan and reschedule, redistribute resources into or away from the project. All of this will reduce the risk profile associated to your plan.

Predicting outcomes

A good manager should trust his subordinates so let your manager manage. By all means monitor the progress but micromanagement or a tendency to keep butting in will undermine the team and ultimately affect performance. In order to let a bird fly you have to let go.

A lawyer who can plan his work and his business will soon gain the confidence of those around

Figure 2: planning diagram



them. While we will never have a crystal ball, a well researched plan that is fully resourced and has financial support is the next best thing to predicting outcomes.

A failure to plan is a plan to fail. So get planning your work and become the master of your destiny. **SJ**

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