How to Become a Legal Project Manager

Written by Sharon Miki

Most of us may know that a project manager takes responsibility for planning, executing, and monitoring a project. But what about the emerging role of a legal project manager at law firms?

Lawyer-client relationships have become increasingly critical to law firm success. More firms are seeking ways to create a more consistent, efficient experience for clients—which has led to a greater need for standardized processes and systems for lawyers to manage matters and projects. In response, the legal industry is experiencing a rise in demand for legal project management solutions—and the profession of legal project managers.

Legal project management takes the skills, tools, and tenets of general project management and adapts them to the specific needs of law firms. Through proactive planning, risk management, budgeting, and resource allocation, legal project managers help lawyers better manage legal matters and projects. Also, legal project managers create more consistency for lawyers around law firm processes and predictability for clients around expectations regarding cost and experience.

Put simply, legal project managers use the principles of project management to help law firms run more efficiently, and in a more cost-effective and client-focused way.

In the following post, we'll provide an overview of the benefits of legal project management for growing firms. We'll also outline the skills that make someone well-suited to the role and how to become a legal project manager—including the tools to help you become more efficient. Hint: you don't have to be a lawyer to be a great legal project manager.

What is legal project management?

As the Association of Corporate Counsel (ACC) outlines, effective legal project management processes clearly define and plan projects. Proper project management processes also ensure projects are implemented, monitored, and adjusted according to pre-determined plans. As the ACC resource explains, we can break down a well-structured legal project management process into four phases:

1. **Set the scope.** The first step is to define the goals, scope (i.e. what work the staff needs to do), and deliverables of a given legal matter.

2. **Plan the project.** Next, a matter's timeline, budget, and staffing parameters must be planned for and set to meet the scope and goals.
3. **Execute the plan**. Carry out the matter by following the plan.
4. **Review and revise**. Once complete, assess the project results, and the process is adjusted if needed.

Benefits of legal project management

While not all law firms necessarily need a legal project manager, most growing firms could benefit from project management. The larger the law firm, the more reasons you need a legal project manager—especially firms with 10 or more lawyers. Though it is possible to grow your law firm without good processes, it can be very challenging. Legal project management can make the growth process smoother, faster, and easier.

Sound, efficient, and proactive processes are key to success as your law firm scales and grows because they ensure consistency. Having proper processes in place means consistency in how your firm handles matters, manages budgets, sets fees, or delivers client experiences.

Benefits of standardizing processes for large projects

With the right legal project management processes, law firms standardize how their firm manages big projects and legal matters. Standardizing can help to provide benefits including:

- **Predictability**. When lawyers and staff know the process of working through a matter, they don't have to develop a new plan every time they take on a new matter. Similarly, with an established process in place, they can better anticipate potential risks. Also, the lawyers and staff at your firm will have a better sense of how long things will take to accomplish—giving clients a better sense of what to expect.
- **Lower costs**. With processes in place, legal project managers can help lawyers budget better. Also, proper processes can help keep costs down by having a more established and efficient plan for each matter.
- **Greater client satisfaction**. When lawyers work with processes to help them stay on track, clients get a more consistent, transparent legal experience.

Legal project management processes are undeniably useful. However, someone has to ensure that these processes are planned, carried out, monitored, and communicated. Someone also needs to update these processes regularly to align with what's working and what isn't. A legal project manager is the best person to own these responsibilities.

All attorneys can benefit from legal project management, but having a dedicated legal project manager would take the task of project management off other staff members' plates. When a dedicated legal project manager handles project efficiency, planning, and risk management, you create consistency, clarity, and accountability.

To summarize, a legal project manager can help lawyers:

- Plan and manage matters and workflows
- Set budgets, deadlines, and goals for projects and matters
- Implement new technology tools and initiatives

What skills are required to be a legal project manager?

You may not have to be a lawyer or have specific certification to be a legal project manager—making it a great alternative legal career. However, you should possess specific skills and attributes to be an effective legal project manager, including:

Project management skills

First and foremost, a legal project manager must be a great project manager who can manage complex projects under pressure within teams. Strong project management skills and attributes—including leadership, problem-solving, critical and strategic thinking—are essential. Project Management Professional certification—which focuses on leadership and people skills, technical management skills, and business organizational skills—is an asset.

Exceptional communication

Great communication skills—whether effectively communicating with an internal team or a mastery of client communication for law firms—are key to legal project management. Legal project managers must be clear when conveying plans for legal work to their teams. They also must be able to keep client experiences and the lawyer-client relationship in mind when shaping a plan for legal work.

Organization and attention to detail

A high level of organization is essential for all lawyers. Still, it's critical for legal project managers who must oversee the planning, budgeting, execution, and evaluation of multiple processes and projects at a law firm.

Analytical skills

Monitoring, evaluating, and analyzing the results of work efforts is a key factor in effective legal project management—which often means looking at data and measuring key performance indicators.

Legal-specific knowledge

While legal project managers don't necessarily need to be lawyers, familiarity with legal processes is helpful for a project manager specific to the legal industry. With this in mind, project managers who also take on the role of a paralegal, virtual legal assistant, or have a similar legal-specific background could have sufficient legal expertise and commercial knowledge (for example, a familiarity with the pricing of legal services) to succeed.

How to become a legal project manager

As mentioned above, you don't necessarily need formal certification to be a legal project manager. The most important element necessary is the right mix of project management skills. However, a background in legal training, certification in project management, and certification or training in legal project management can all go a long way towards helping you level up. For example, the LPM Institute offers a range of training courses and certification options.

For non-lawyers or lawyers looking to transition to an alternative legal career, there are plenty of legal project manager jobs available at law firms and larger companies.

If you're already working for a growing law firm, there may be an opportunity within your existing firm. In this case, your firm may need someone to take on a dedicated legal project manager role to guide processes and projects as the firm grows. Don't rule out becoming a legal project manager at your current firm, even if the role does not exist yet. You could make a case for taking on a new role in project management with your boss or partner at your law firm.

Helpful legal project management tools

Just as technology can help lawyers work more efficiently, the right tech tools can make legal project management more effective for a legal project manager, lawyers, and clients.

Clio for time tracking, document management, client intake, and more

As cloud-based legal practice management software, Clio Manage makes it easier to run a law firm—from tracking time to keeping cases organized, to managing legal documents, to collaborating with clients—all in one place.

For legal project managers looking to help lawyers stay on top of matters, Clio's task management features are particularly useful by empowering the entire firm to manage processes via progress and productivity reports. Clio's task management features also allow your firm to see upcoming, overdue, and completed tasks on a per-user basis.

Clio also offers more than 200 integrations, which connect Clio with other apps for further connection and functionality. To learn more about Clio's top five automation integrations, you can read this post.

Trello, Asana or Monday.com for task assignment

Keeping track of assigned tasks is challenging. But project management tools can help centralize systems. Here are options that work well for legal project management:

- Trello lets you create a customizable digital board to manage projects and organize tasks, timelines and productivity within a team.
- Similarly, Asana's web and mobile apps let you organize, assign, and prioritize tasks within a team.
- Monday.com is a project management tool that offers a customizable platform that can scale and grow with your team.

Google Docs for collaboration

Collaboration is key for effectively planning projects and processes. Google Docs makes it easy for users to collaborate and plan projects together, from anywhere. For added security and control features for business, Google Workspace is another option.

Dropbox for online file storage

Dropbox offers convenient online file storage when you need to share files between your client and the law firm team. Also, Dropbox is a popular option for law firms. According to the 2020 ABA Legal Technology Survey Report, 67% of survey respondents indicated they were Dropbox users.

Conclusion

Legal project managers help law firms run more efficiently—especially as they grow. By defining, implementing, and refining processes at a law firm, a legal project manager can proactively create more consistent and efficient workflows to benefit lawyers, staff, and clients.

Whether you're considering taking on a legal project management role at the firm you're currently at or you're looking for an alternative legal career by finding a new legal project manager job, you don't have to be a lawyer to be a legal project manager. But, a background in the law is an asset. Project management and legal project management training and certification can also help. Ultimately, excellent project management, organization, and communication skills are key.

Note: The information in this article applies only to US practices. This post is provided for informational purposes only. It does not constitute legal, business, or accounting advice.

Frequently asked questions

What does legal project management do?

Legal project management refers to the processes, tools, and techniques that firms use to manage legal matters and projects. It includes activities such as scoping, defining objectives, creating timelines and budgets, managing resources, monitoring progress, and communicating with stakeholders. Essentially, it ensures law firms operate efficiently and effectively.

What is legal PMO?

A legal Project Management Office (PMO) is a centralized team that oversees a firm's project management activities. Legal PMOs are responsible for managing the legal project lifecycle, from planning and organizing to execution, monitoring, and evaluation. They can also provide budgeting, resource allocation, training, and dispute resolution support.

What are the benefits of legal project management?

Legal project management offers wide-ranging benefits. Effective legal project management boosts a law firm's efficiency, improves the quality of its work, aids communication within the firm and with stakeholders, and reduces risk. Therefore, it can play a vital role in enhancing a law firm's profitability and performance.

Can a lawyer do project management?

Yes, lawyers can do project management. Project management tools and techniques allow lawyers to effectively plan, execute, and monitor legal projects while meeting all necessary deadlines. It aids collaboration and ensures everyone's on the same page. This creates a high-performance culture throughout the firm.

About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.