



# Project Management Tools for Success

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In this guidebook, *Project Management Tools for Success*, professional project manager Marie Spark details key project management tools for lawyers, including considerations and constraints, areas to focus on, and approaches that will lead to success.

## ➤ TRIPLE CONSTRAINT



### Key Definitions

- A **project** is a coordinated set of activities to create something new within a deadline. Legal work is by its nature project-based.
- A **project manager** is the person who coordinates those activities and makes sure everything is completed successfully. Lawyers are project managers!

### Understand the “Triple Constraint”

- Projects are constrained by **schedule**, **budget**, and **scope**. Changing one affects the others.
- **Set expectations** when changes are proposed or occur. *“There is no problem that time and money can’t solve.”*
- Create a **project charter** to set expectations for the triple constraint.
- **Let clients know** that asking for more work will result in delays and higher fees.

### Project Managers and Attorneys Share Common Traits

- Very organized and detail-oriented
- Goal-driven
- Great communicators
- Problem-solvers
- Read people and situations well—between the lines
- Manage without authority by positive motivation, leadership, and appreciation of others
- Spell out what might “seem obvious” to others
- Track, communicate and resolve all roadblocks



## COMMUNICATION IS KEY



### Focus on Stakeholder Management

- Project managers balance stakeholder interests and work to keep key parties informed, including project managers themselves, clients, the public, opposing counsel, and more
- Hold formal kickoff meetings to launch the project and get everyone on the same page
- Hold formal closeout meetings to recognize and appreciate the team, tie up loose ends
- Manage up and manage down—don't forget the little guy
- Plan and manage communication. Communication is 90% of a project manager's job
- Formalize preferred methods and frequency of communication



### Create Project Schedules

- Schedules will change—project managers plan for that.
- Create a best-estimate schedule based on constraints to start.
- Actively communicate this schedule and manage changes as they arise.

### Create a Milestone Chart

- The milestone chart may include the task name, description, expected start date, expected completion date, owner, dependencies and risks, and status.
- Milestone charts should include major project activities by stage:
  - Initiations & Planning (launching the project)
  - Execution (getting the work done)
  - Closing (key deliverables and wrap-up)



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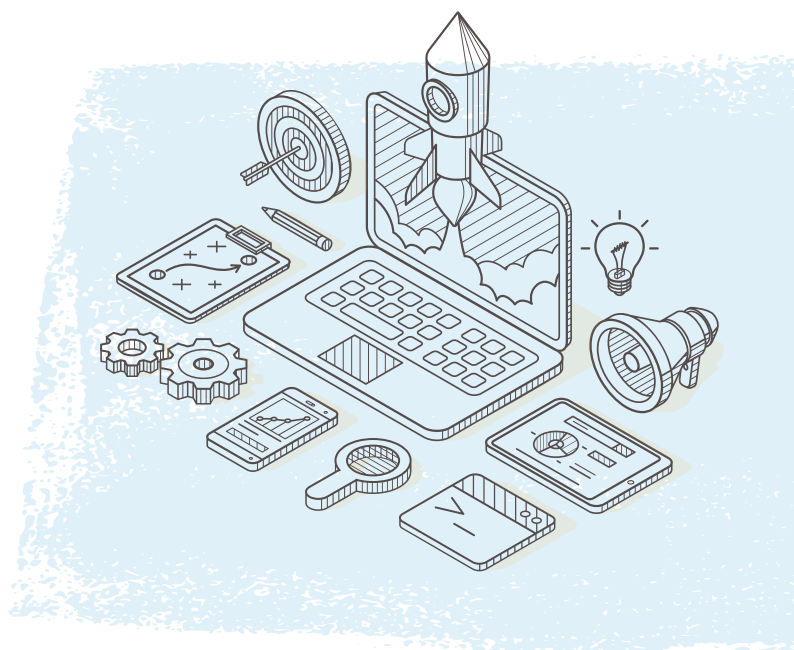
## THE TOOLS YOU KNOW

### Tracking Project Schedules

- There are many modern tools to track projects: MS Project, Asana, Trello, Basecamp, Yammer.
- Unless you are a project professional, keeping it simple is best—use templates and tools you already know. Excel is a great tool!

### Resources

- PMI (Project Management Institute) – active chapters around the world. Networking events and lectures open to anyone: [www.pmi.org](http://www.pmi.org)
- [www.projectmanagement.com](http://www.projectmanagement.com) – knowledge portal
- “Legal Project Management” – key term to find growing number of books and articles



## KEY TAKEAWAYS

1. Lawyers are project managers! A project manager is the person who coordinates activities and ensures project success.
2. The ideal project manager has a combination of leadership, business management, and technical skills.
3. When the project is a success, the team takes credit. When the project fails, the project manager takes the hit.
4. Set expectations with your clients. “There is no problem that time and money can’t solve.” Asking for more means paying more and waiting longer for results.
5. Communication is 90% of a project manager’s job.
6. Project managers manage without authority by positive motivation, leadership, and appreciation of others.
7. Formalize preferred methods and frequency of communication of all stakeholders.
8. Hold formal kickoff meetings to launch the project and formal closeout meetings to recognize and appreciate the team, tie up loose ends.
9. Set milestone goals and deadlines for initiations & planning, execution, and closing.
10. Unless you are a project professional, it’s best to keep it simple. Use templates in tools you’re already using.