

ILTA'S 2015  
PROJECT  
MANAGEMENT  
SURVEY RESULTS



**SURVEY**

AUGUST 2015

# INTRODUCTION

**About a week before last year's ILTA conference, the typically calm project management e-group began to explode with messages about additional networking events targeted for people in project management (PM) roles.**

With the help of ILTA staff and sponsors, we set up and communicated additional networking opportunities for PM professionals attending the conference. Setting up and attending those events made me realize there's a resurgence of project management in law firms.

The focus has been on legal project management (LPM) for the last five to seven years, and our previous surveys and colleague feedback indicated the ranks of traditional project managers was stagnate or shrinking. Also during that time, the thought of opening a new project management office (PMO) at a law firm was nearly nonexistent. That thought process has certainly changed. We saw

a significant jump, from 34% to 46%, of respondents with formal PMOs, and 27% indicated they have added more dedicated project managers to their organizations. Make sure to review the insightful open-ended responses given regarding advice for those starting a PMO and for general project management.

Our last survey introduced questions specific to LPM and litigation PM. We learned the best resource to answer those questions wasn't always the best resource to answer the survey's other project management questions. To address this and allow for those taking the survey to provide the best answers, we changed the survey to allow people

the choice to skip sections. This seemed to work out very well this year. Many respondents answered only sections that applied to their specific area of expertise. I found the responses fascinating in these two areas, and I encourage you to review them.

A special thanks goes out to Amanda Lucas, who triple-crunched all the numbers for this survey. Great job, Mandy!

**Scott David**

*Senior Manager of Service Support  
at Vorys, Sater, Seymour and Pease LLP*

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### ABOUT ILTA

*Providing technology solutions to law firms and legal departments gets more complex every day. Connecting with your peers to exchange ideas with those who have “been there done that” has never been more valuable. For over three decades, the International Legal Technology Association has led the way in sharing knowledge and experience for those faced with challenges in their firms and legal departments. ILTA members include firms of all sizes and all areas of practice, all sharing a common need to have access to the latest information about products and support services that impact the legal profession.*

### STATEMENT OF PURPOSE

*ILTA provides the premier environment for peer connections, education and collective intelligence to leverage the strategic advantages of technology in the legal profession.*

### DISCLAIMER

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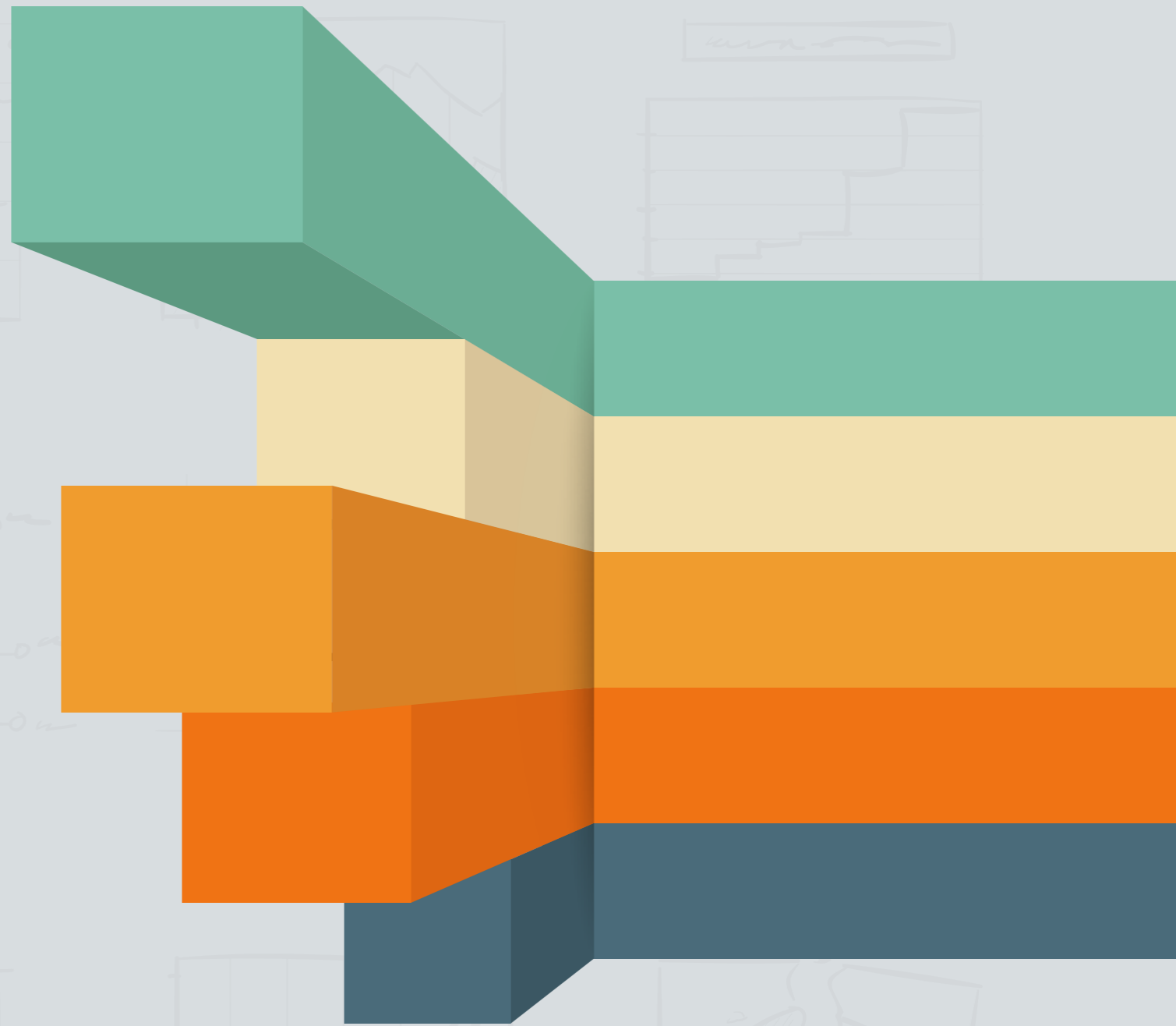
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International  
Legal Technology  
Association

# General Project Management



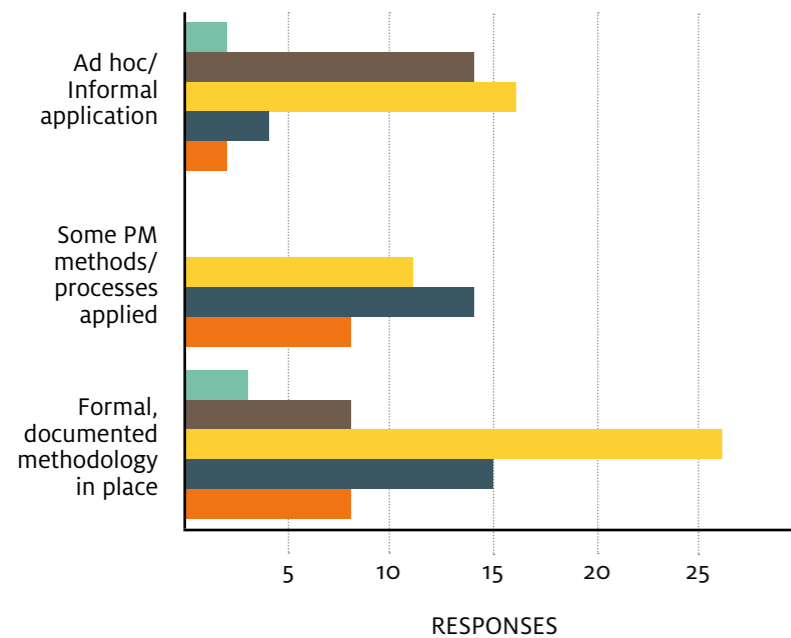
### How many attorneys are in your organization?

NUMBER OF ATTORNEYS	RESPONSES
50 or fewer	5
51 - 150	22
151 - 500	53
501 - 1000	34
More than 1000	18

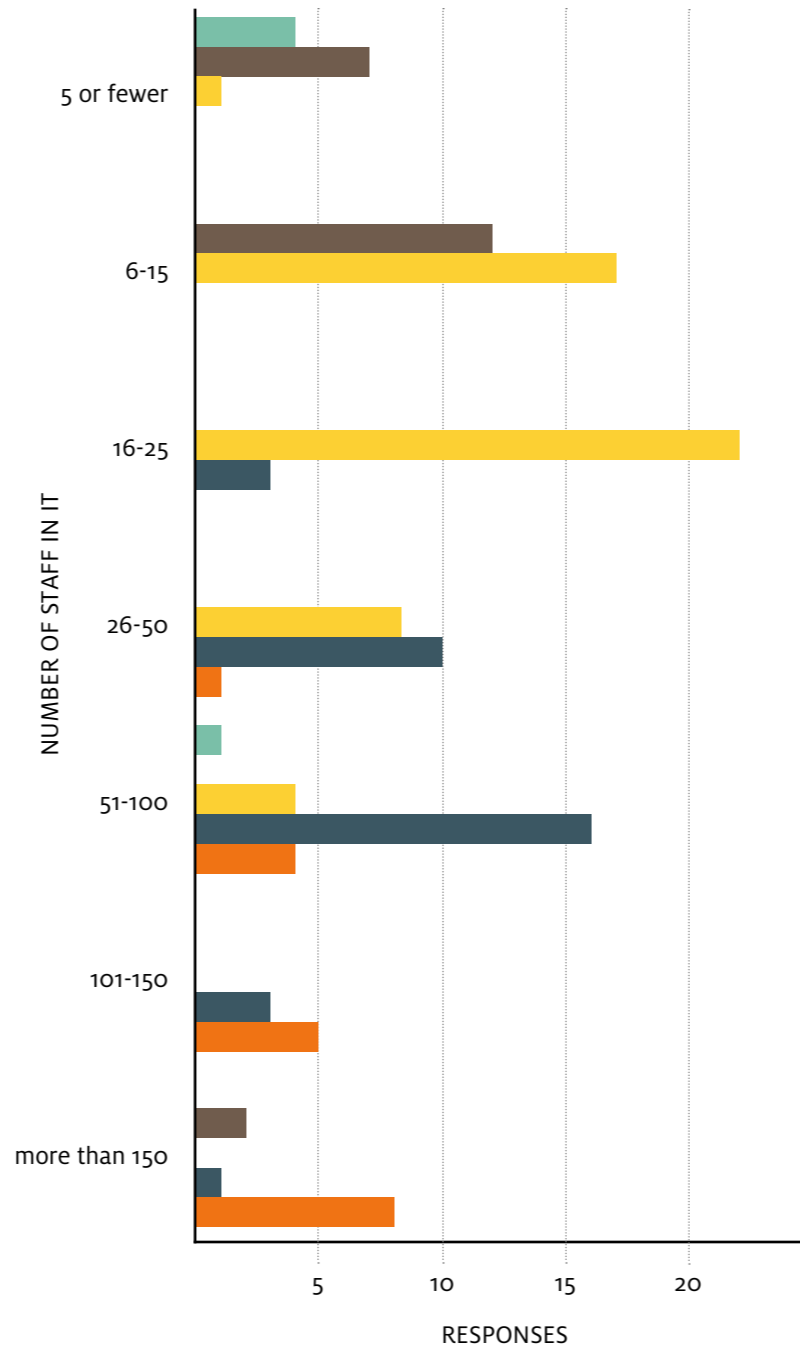
### Which statement best describes your organization's approach to project management?



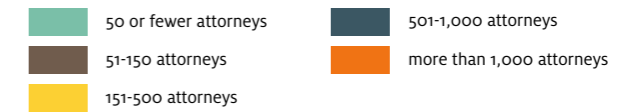
As was noted in previous surveys, larger firms tend to have more structure; however, project management and processes are starting to make their way into smaller firms.



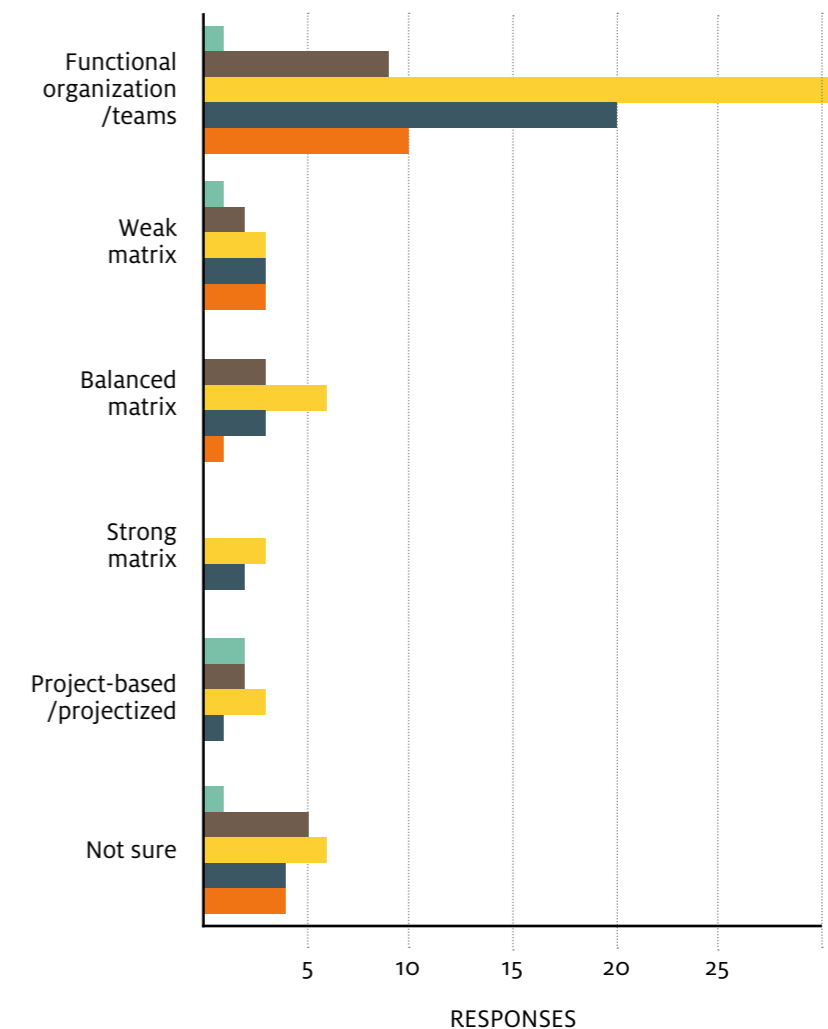
### What size is the IT/technology department at your organization?



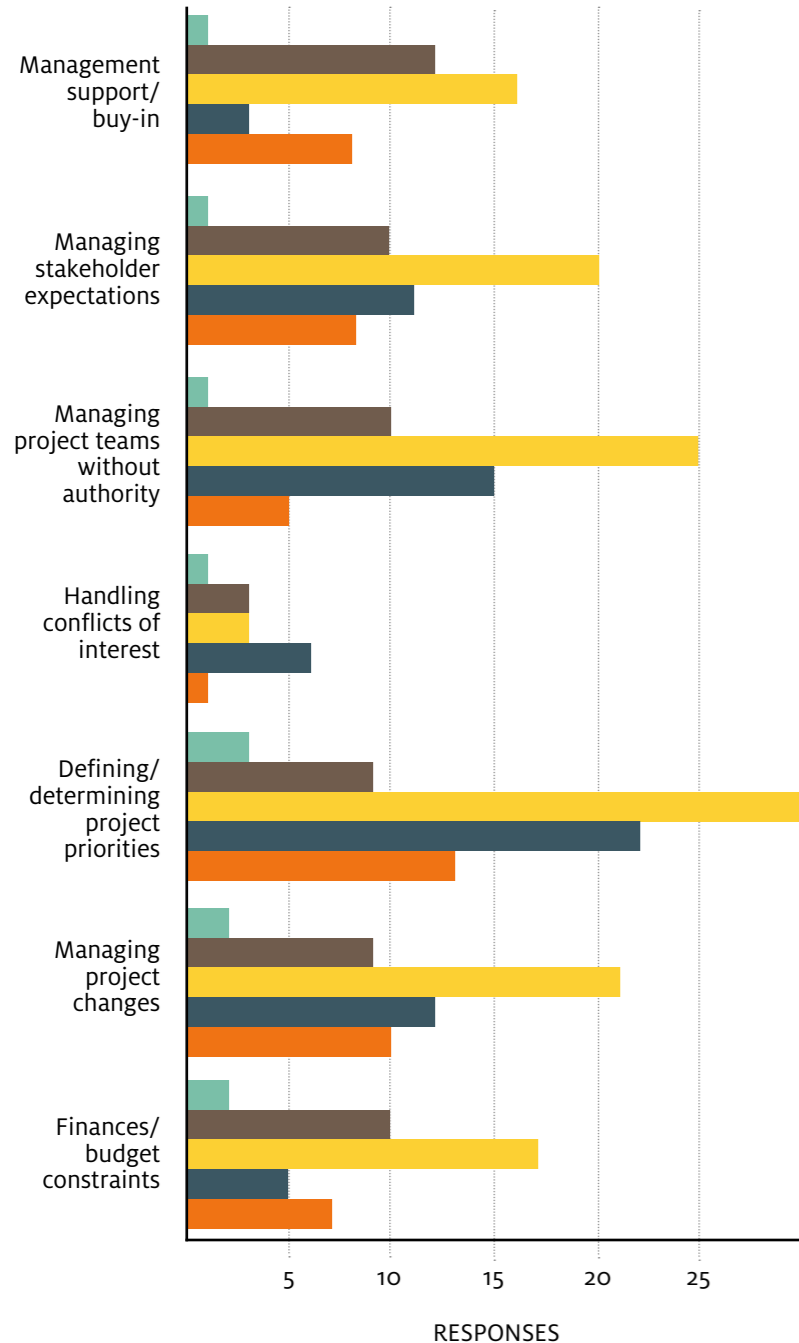
### Which statement best describes the structure of your IT/technology department?



Although matrix teams are quickly becoming more popular in other industries, law firms seem to be following suit a bit more slowly. In this survey, 71 of the 129 respondents (55%) indicated that their departments are still functional teams. The number of matrixed organizations is up slightly to 23% from our last survey. In 2012, we recorded 64% of firms used functional teams, 19% were matrix and 7% were project-based. This year has the results at 55%, 23% and 6%, respectively.



## What are the biggest challenges firms are experiencing in project management? (select all that apply)

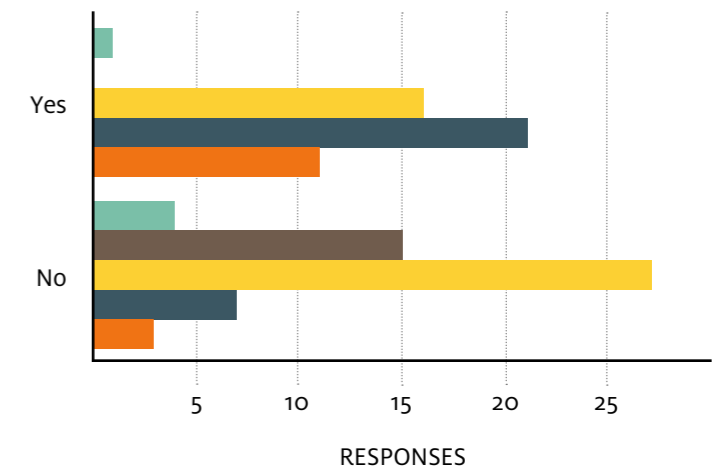


*Defining/determining project priorities was listed as the most significant challenge facing firms when managing projects, with midsize and large firms reporting more challenges than smaller firms in issues like directing without authority and managing change.*

Other Feedback provided was:

- Capacity/Volume Management;
- Charging fees for project management time;
- Competing priorities;
- Creating a culture of ownership re: project results;
- For business led projects - No consistent use of Project Management methodology;
- No consistent use of project plans;
- Internal department managers not having PM skills;
- Getting IT staff to buy in to and follow project management approach;
- Getting shareholder buy-in/compliance;
- Lack of resources/Resource constraints;
- Misunderstanding potential impact to compensation;
- Prioritization by business partners;
- Senior people who were self-directing for many years do not know enough about project management to understand and acknowledge the value of following a process by a less senior person.
- Clients drive all change. When the clients start demanding Project Management, things will change.;
- Strong Subject Matter Experts - Lack of legacy SME knowledge.;
- Understanding the value of project management.

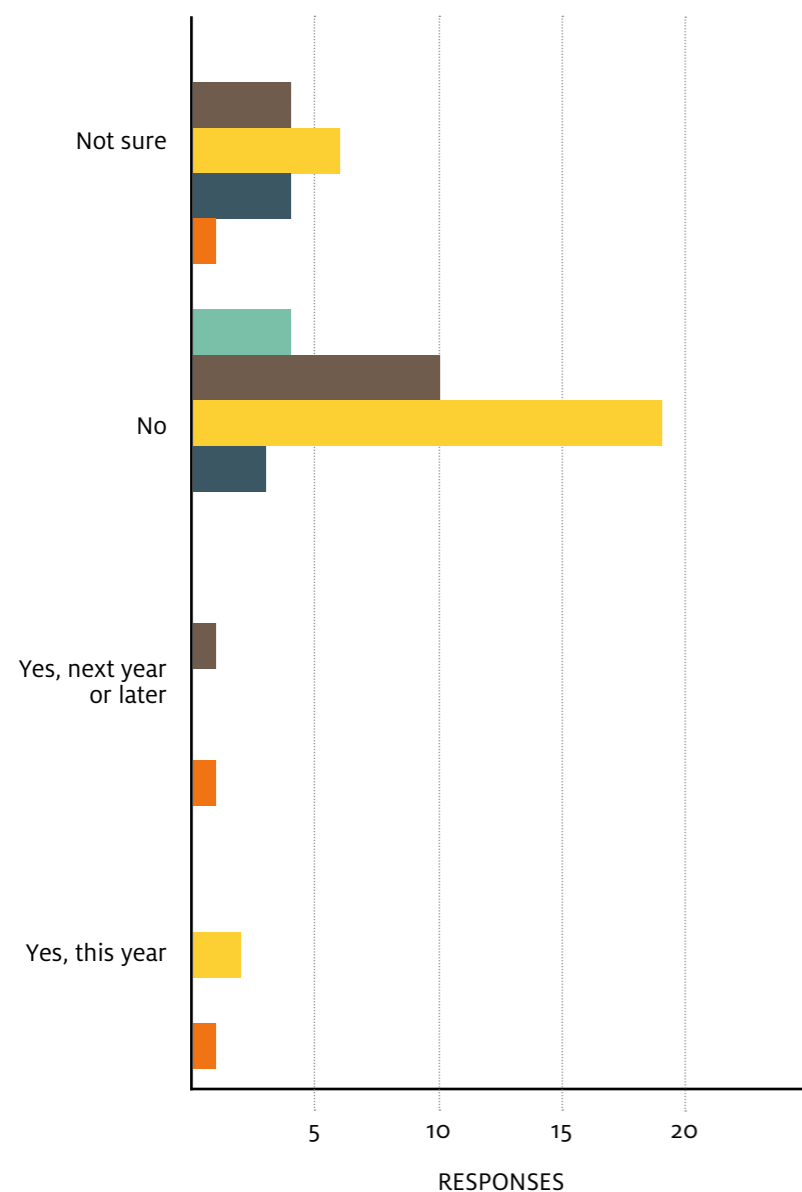
## Do you have a PMO or PM Team?



### Are there any plans to add a project management office or team?



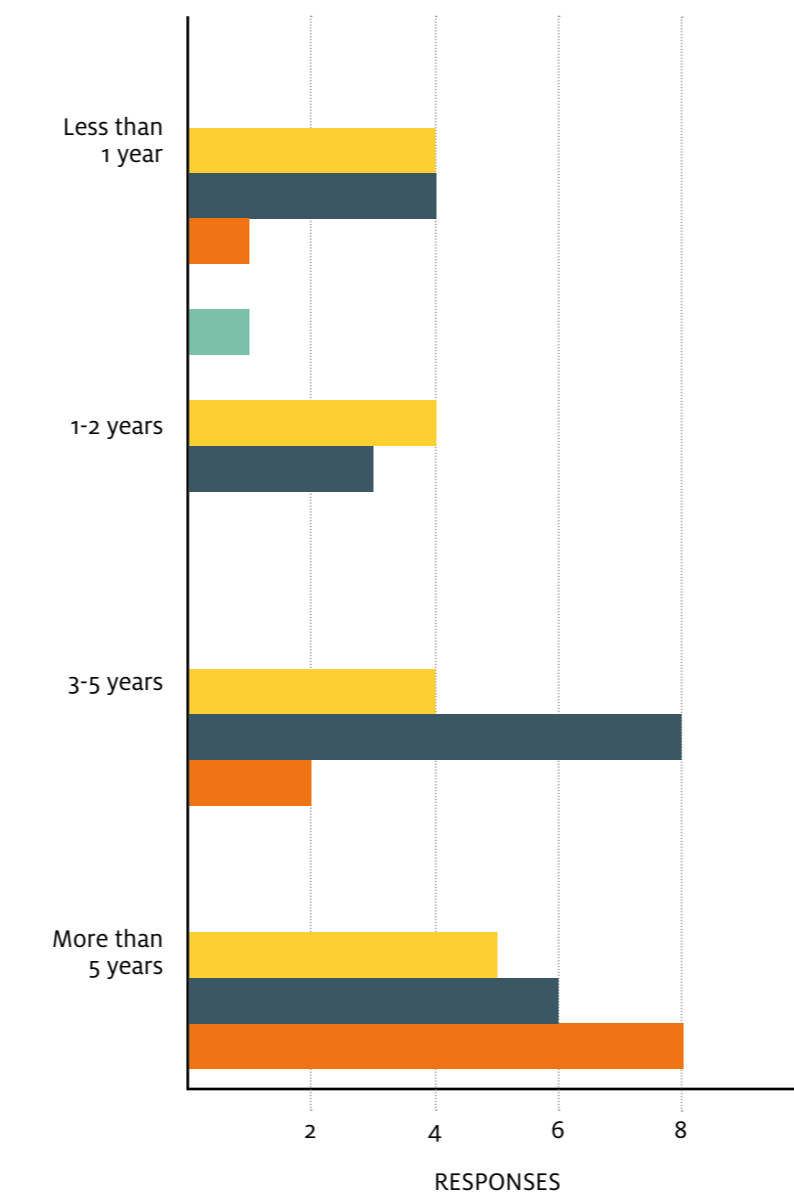
Only a few of the "non-PMO" firms indicated that they would be adding a PMO or project team in the future. Most firms without them have no plans to add the structure at this time.



### How long has the PMO/team been in place?



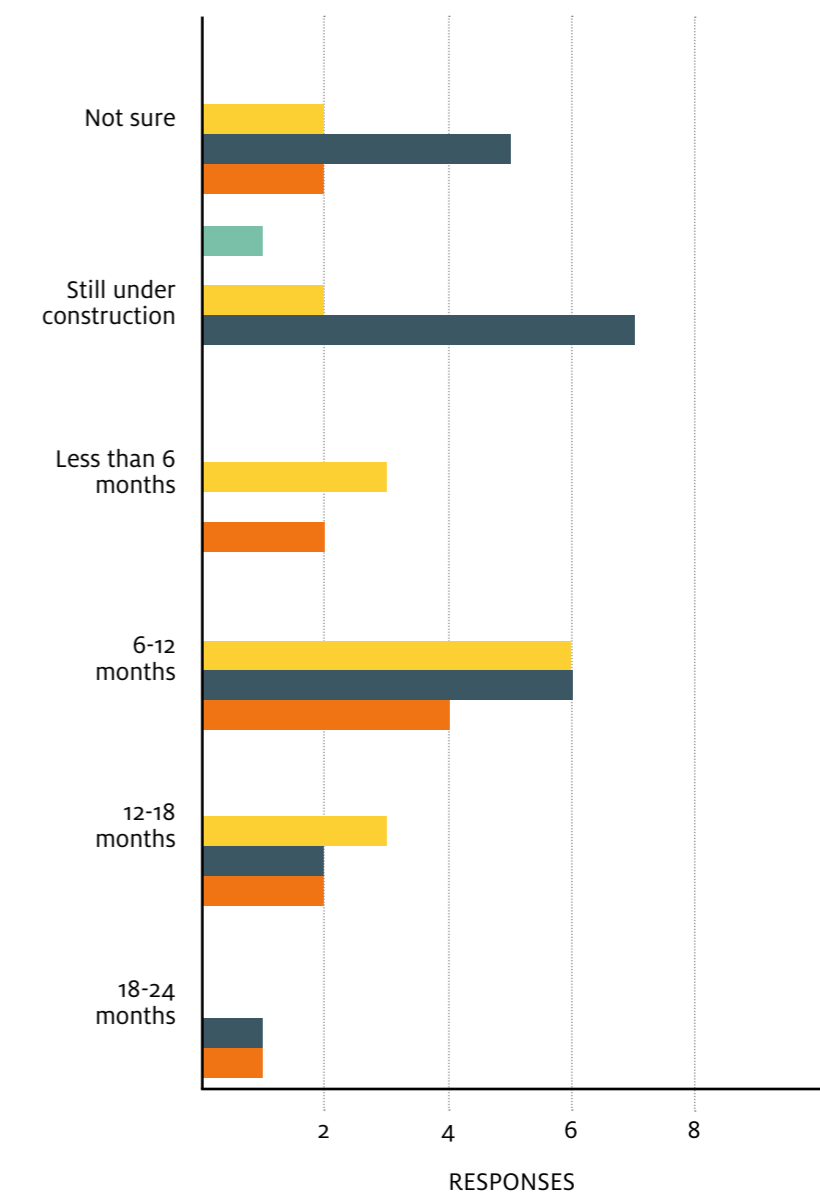
With 50 firms having "official" offices/teams in place and accounted for in the survey, 38% of them have been functioning for more than 5 years. Most of those are from firms with more than 1,000 attorneys.



### How long did it take to establish the PMO/team from conception to implementation?



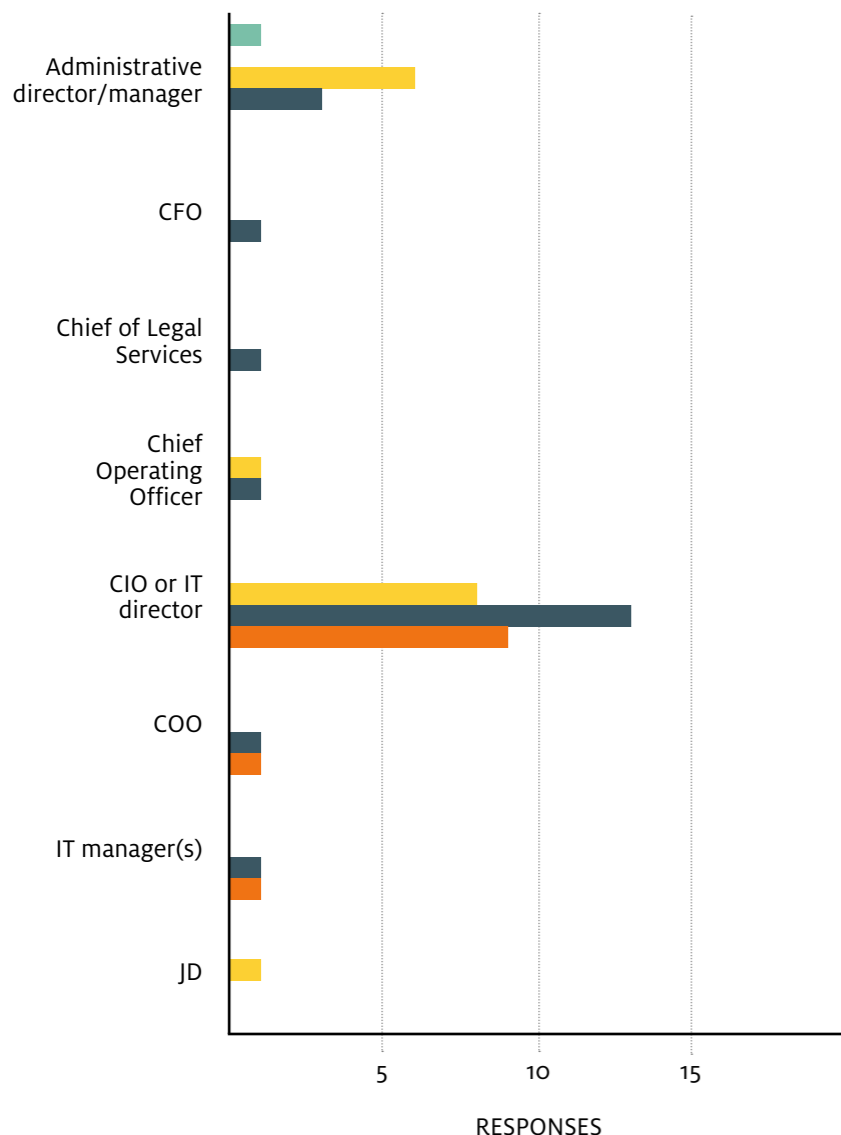
33% of firms reported that it took between 6 and 12 months to establish a PMO in their firm. Another 20% report that the process is underway at this time, and they will be able to report on setup time in a future survey.



### Who was the primary sponsor for the PMO/team implementation?



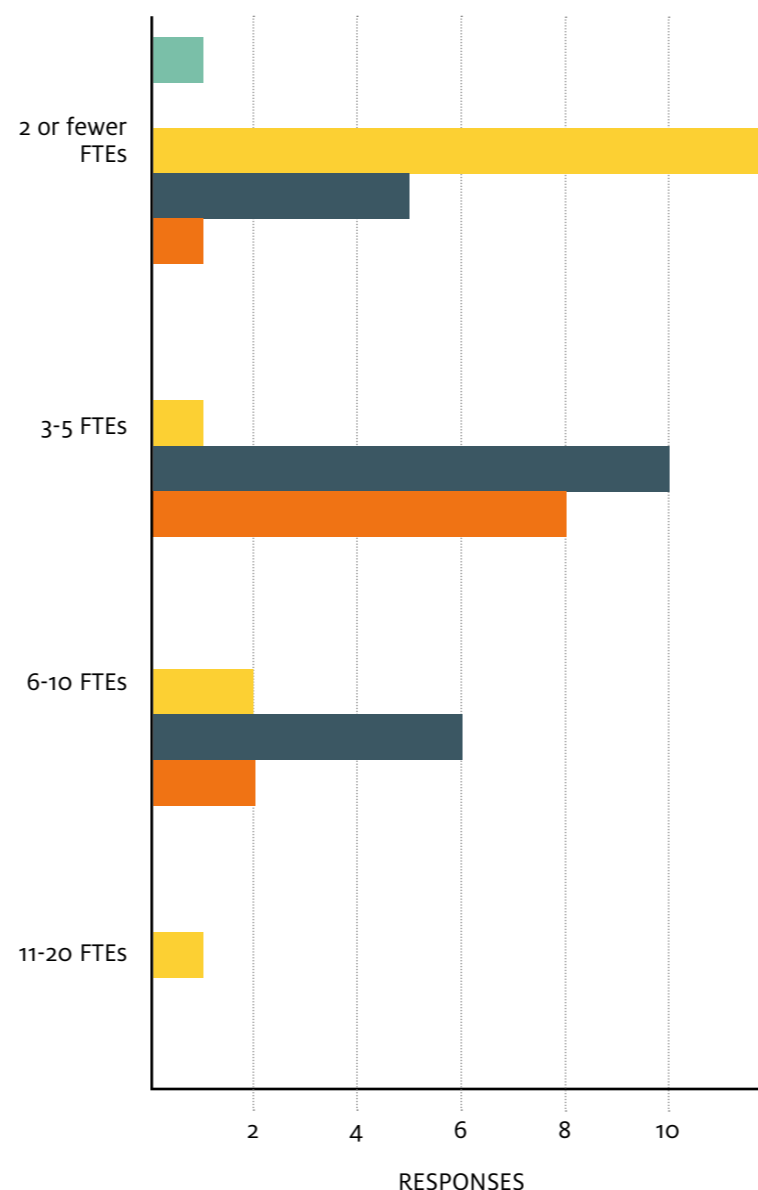
Although the results show that a large number of PMOs were sponsored by the CIO of an organization, it is important to note that 35% of the PMOs were sponsored by individuals outside the IT role. This is significant to note based on the scope of this survey and the tendency of project management to originate from the IT department.



### How many full-time equivalents staff the PMO/team?



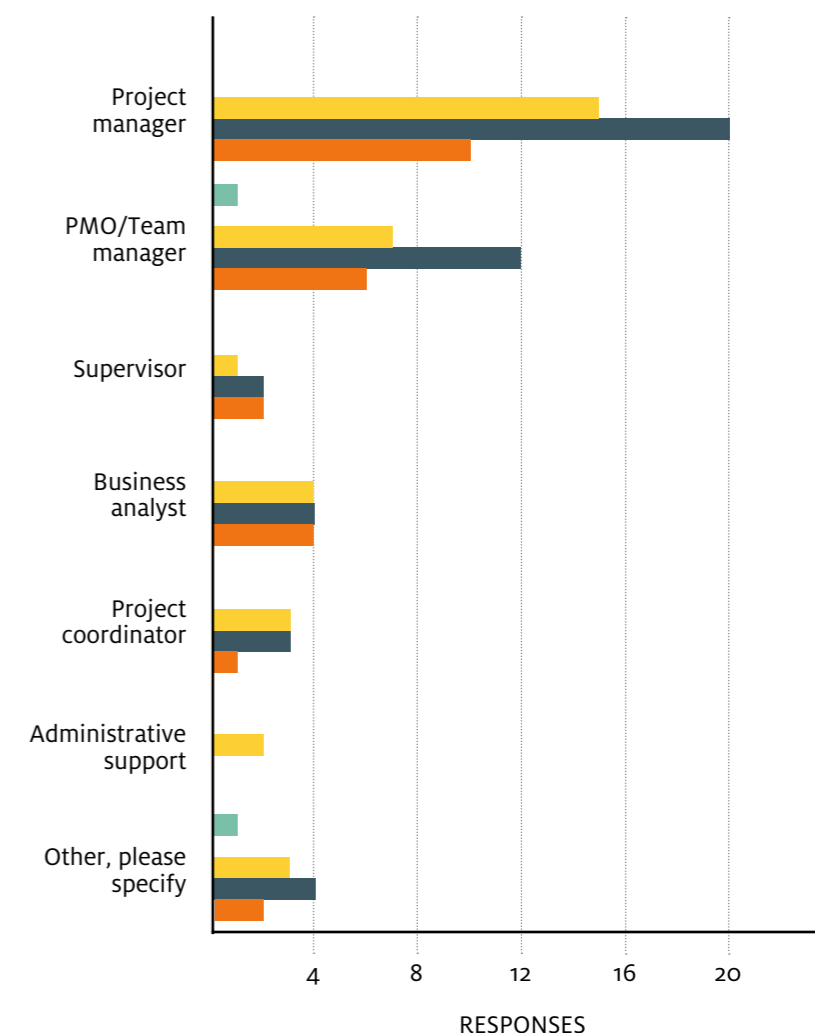
Most firms, 78%, report that they have five or fewer full-time members on the PMO team.



### What positions are included in the PMO/team? (select all that apply)



While 92% of the firms report that project managers are on the PMO/team, other roles were also included, most commonly a manager of the team and business analysts. Additional roles that were included in the PMO/team were: Developer, Quality Assurance Analyst, Program Manager, CIO, CTO, Operations Director, QA/Change Management Specialist, IT, IT Project Analysts (ba/system testers), Director Project Management, Staff Aug Project Managers, Quality Assurance Analyst, and Process Analyst.

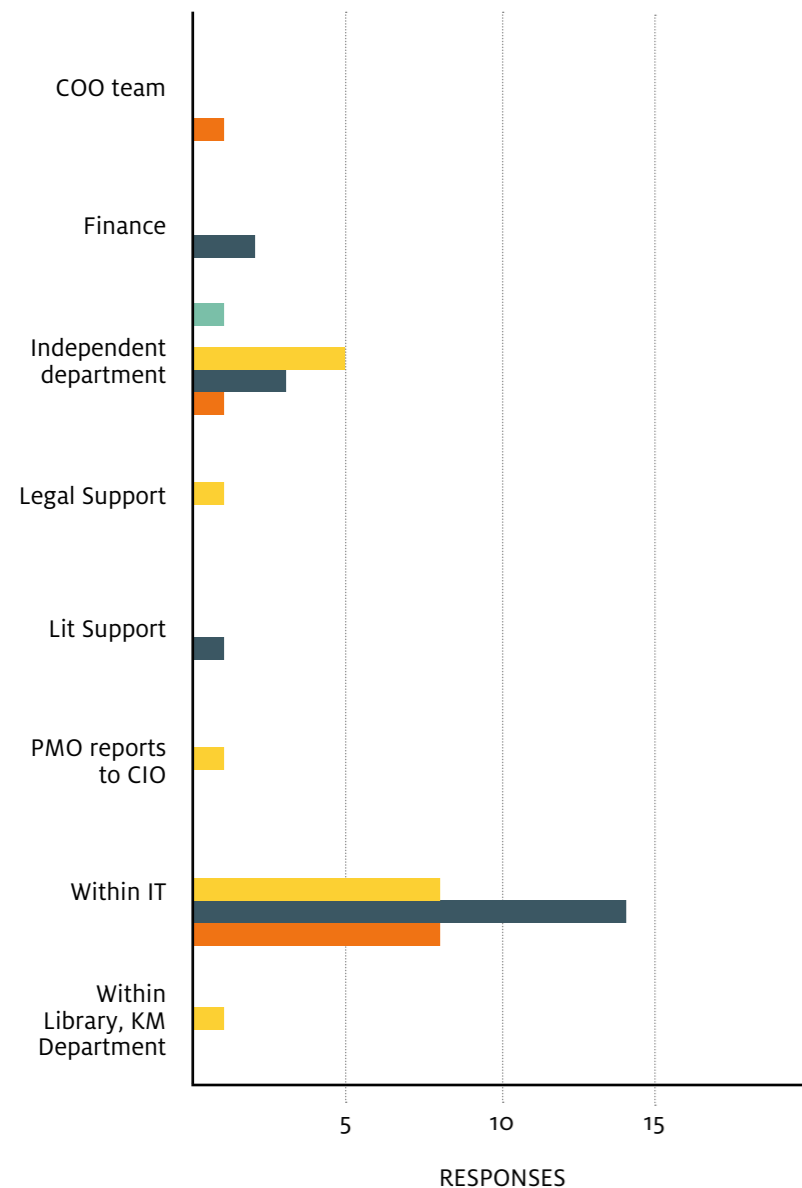




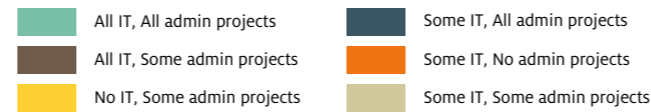
### Where does the PMO/team fit in the organization?



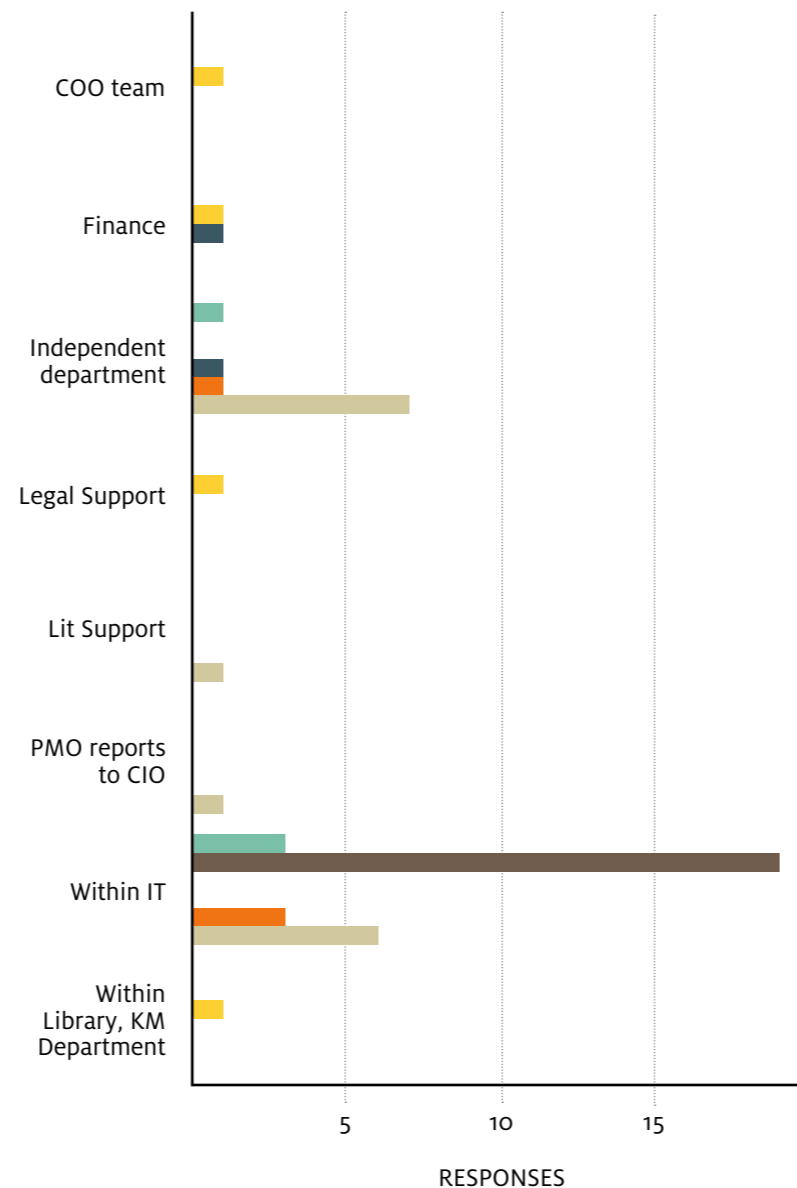
Many of the firms responding chose to position the PMO within the IT department; however, 21% indicated the PMO is an independent department.



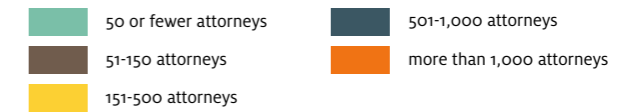
### Which statement best describes the scope of the PMO/team?



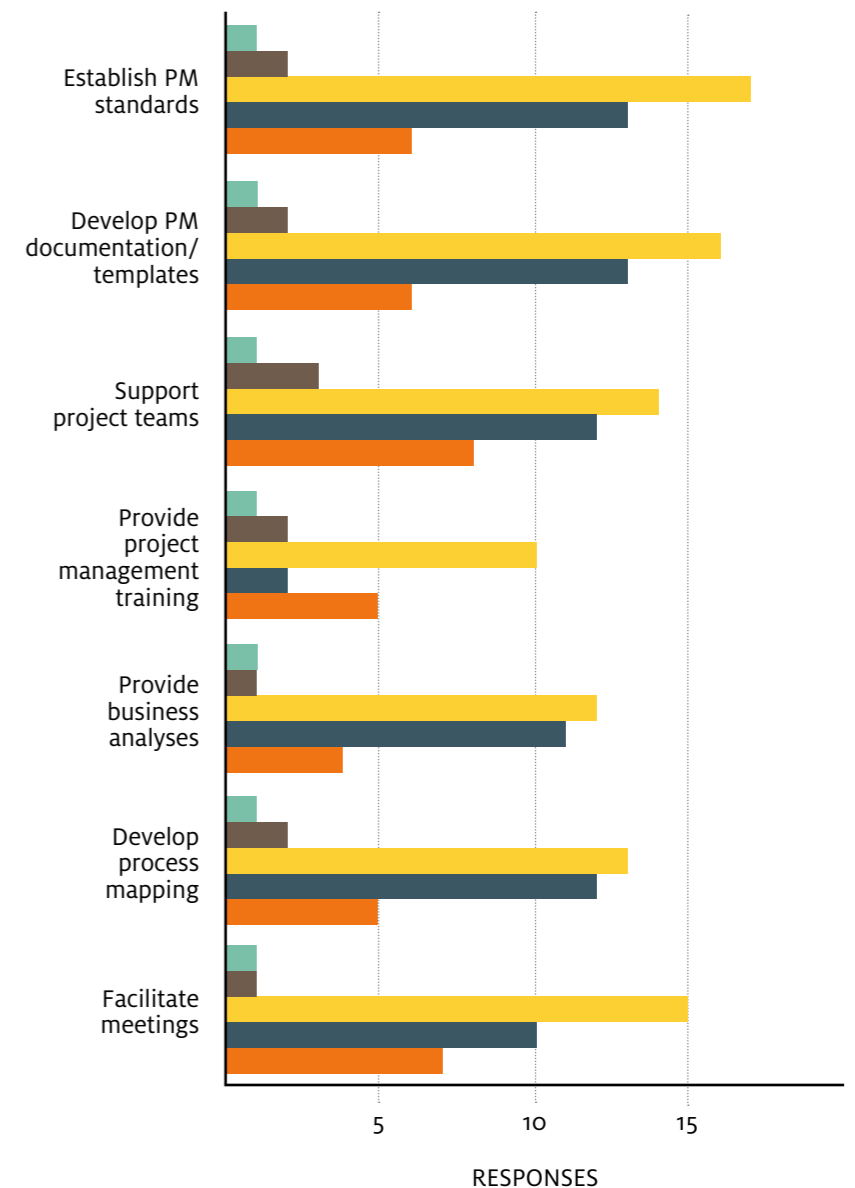
When looking at the scope of the PMO and the projects it manages, it is interesting to consider where the PMO falls in the organization. In the graph below, you will note that even when the PMO is positioned within IT, it is not always guaranteed to manage all IT projects.



### What other services are provided by the PMO/team? (select all that apply)



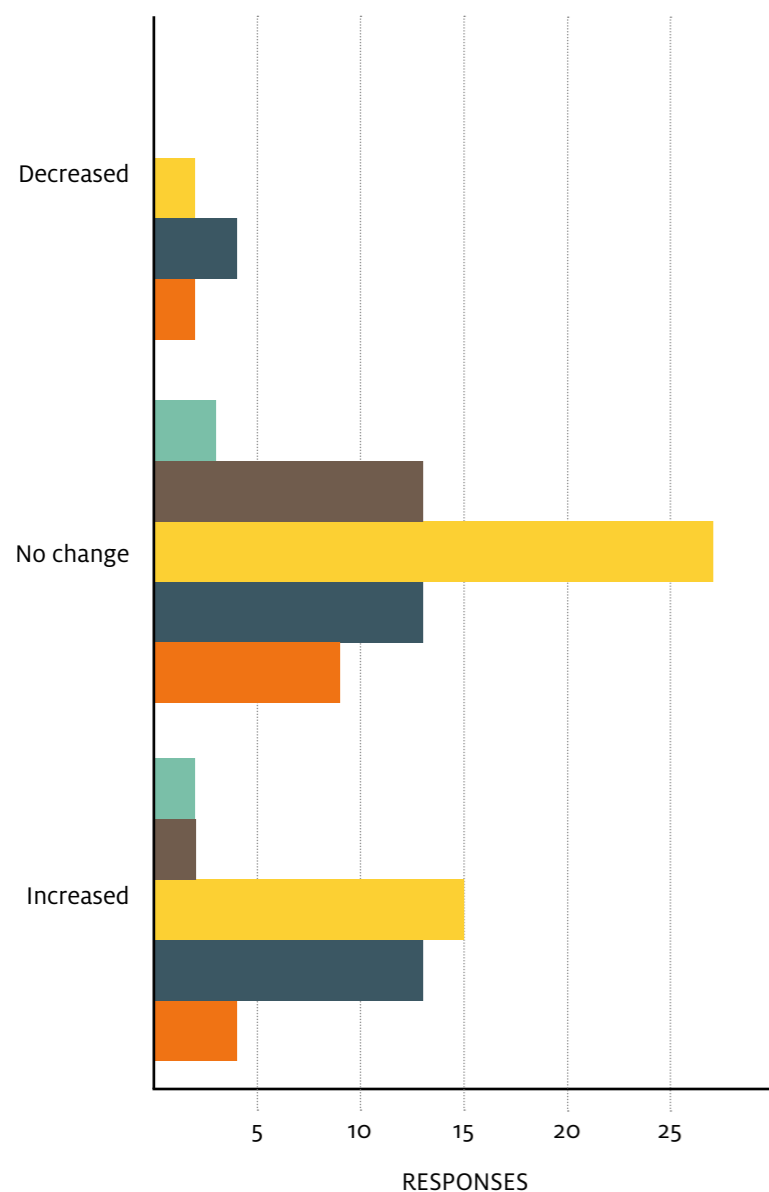
Out of the 68 responses, most firms view the PMO as a team of individuals who have the responsibility of providing direction for projects, such as templates and standards. Some PMOs also provide system testing, process improvement, change management and quality assurance.



### How has the number of dedicated PMs changed in your organization over the past 18 months?



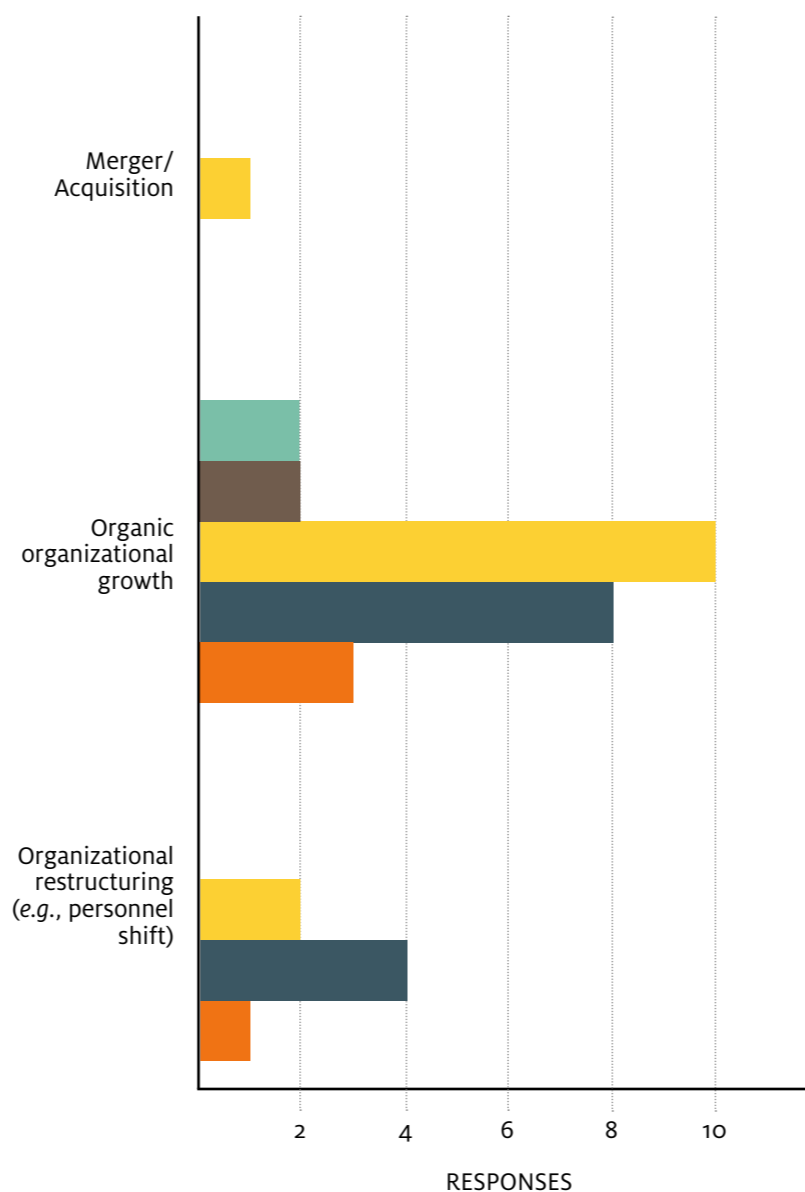
Out of all respondents, 49% indicated that their number of dedicated project managers did not change in the last year, and 27% have added more to the team. This is consistent with the last survey and matches the industry and overall trend toward a focus on project management.



### What was the cause of this increase?



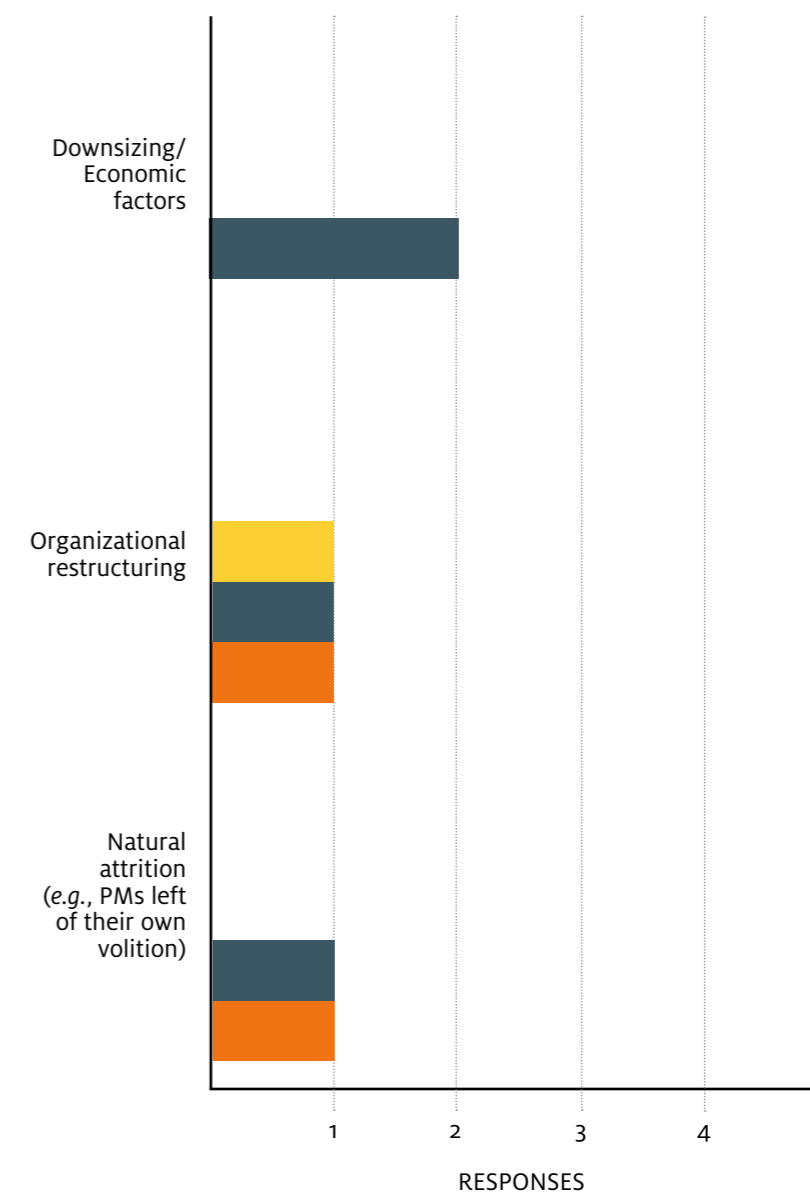
An increase in the number of dedicated project managers was predominately organic in nature, related to general organization growth and need. Midsize and large firms saw the most growth.



### What was the cause of this decrease? (select all that apply)



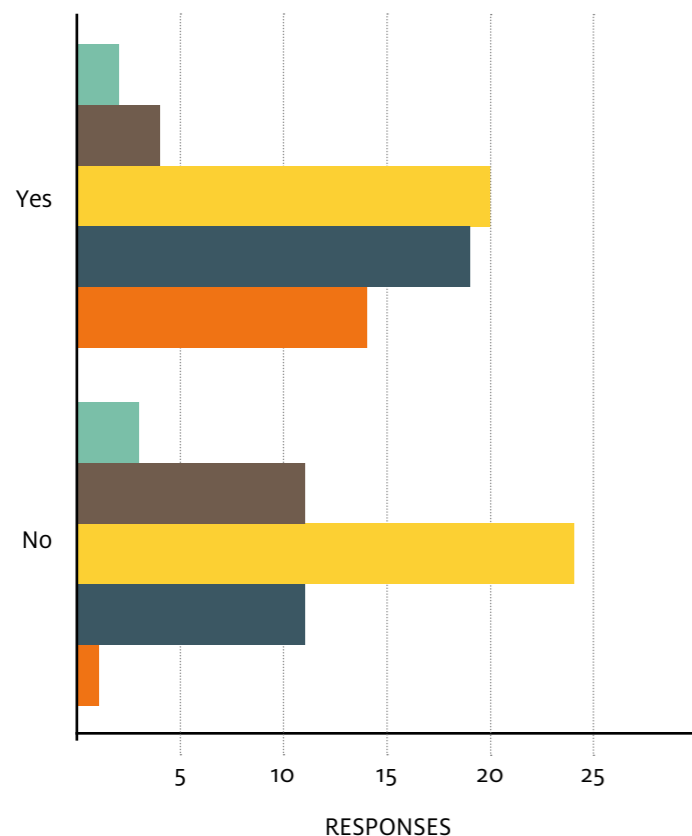
Only 7 organizations reported any reason for loss of PM staff, with results being spread evenly between the causes.



### Does your firm employ dedicated IT/technical project managers?



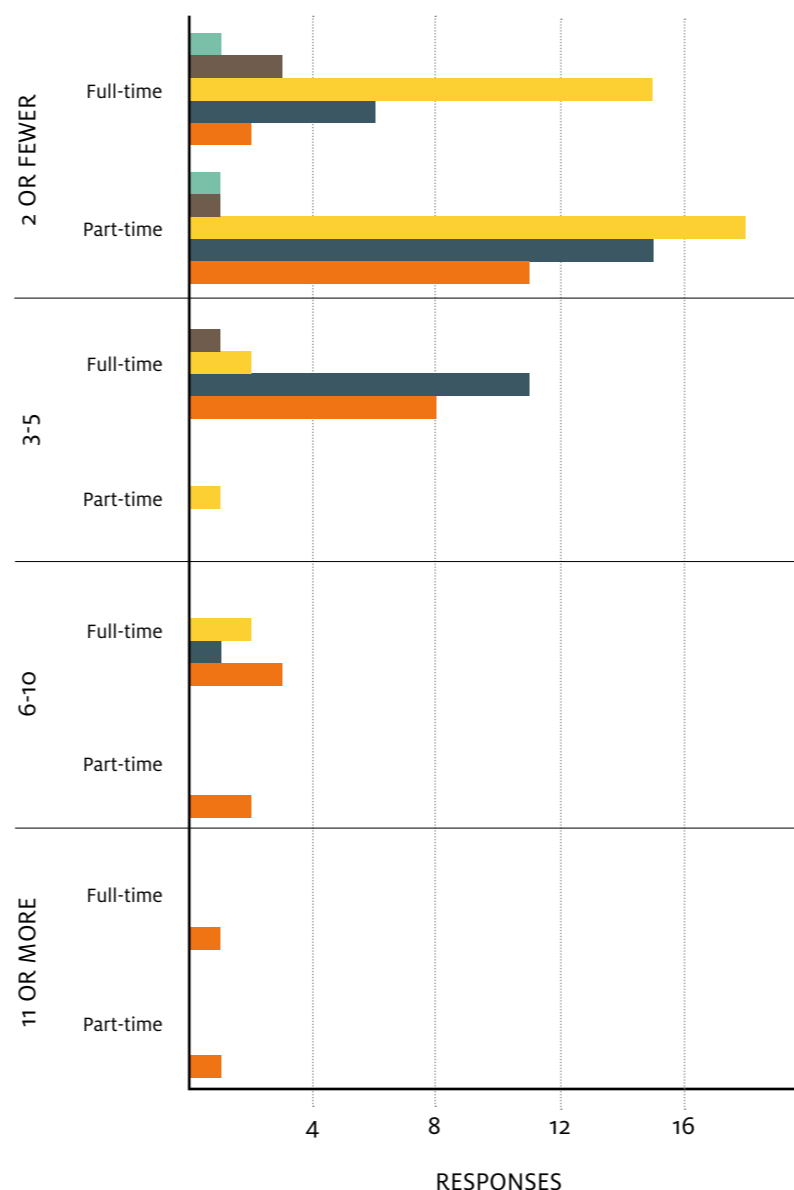
Of the 109 responses to this question, 59 organizations indicated that they employ dedicated IT project managers. The likelihood is higher with larger firms, as 56% of firms over 500 attorneys reported that there are dedicated PMs for IT.



### How many full-time and part time IT/technical project managers are in your organization?



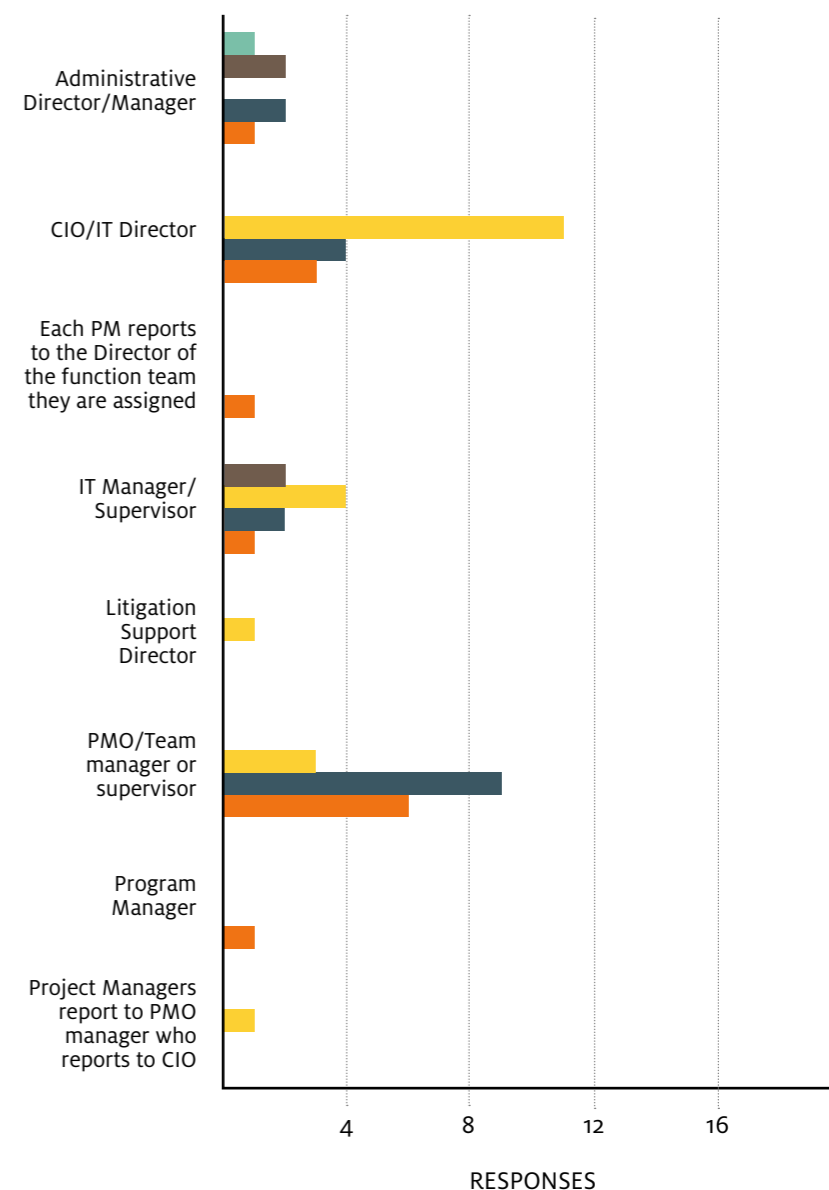
Of the 59 firms that responded with a "yes" to the previous question, 1 firm reports using part-time employees only, and 7 report using only full-time employees. The remainder use a combination of full- and part-time staff to provide project management oversight.



### To whom do project managers report in the organization?



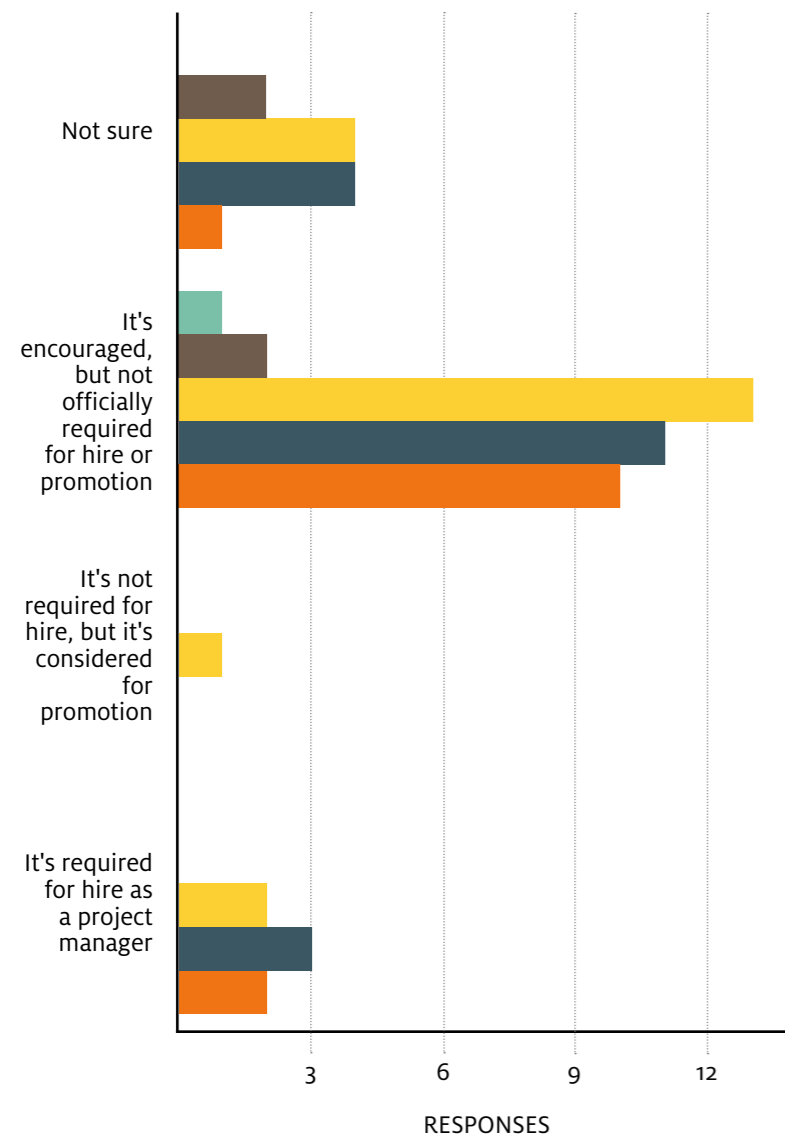
In 49% of the firms responding, the project managers report directly to the CIO or another supervisor within the IT department. PMO Managers are in place in 34% of the firms.



### Which statement best describes the importance of professional project management certification in your organization?



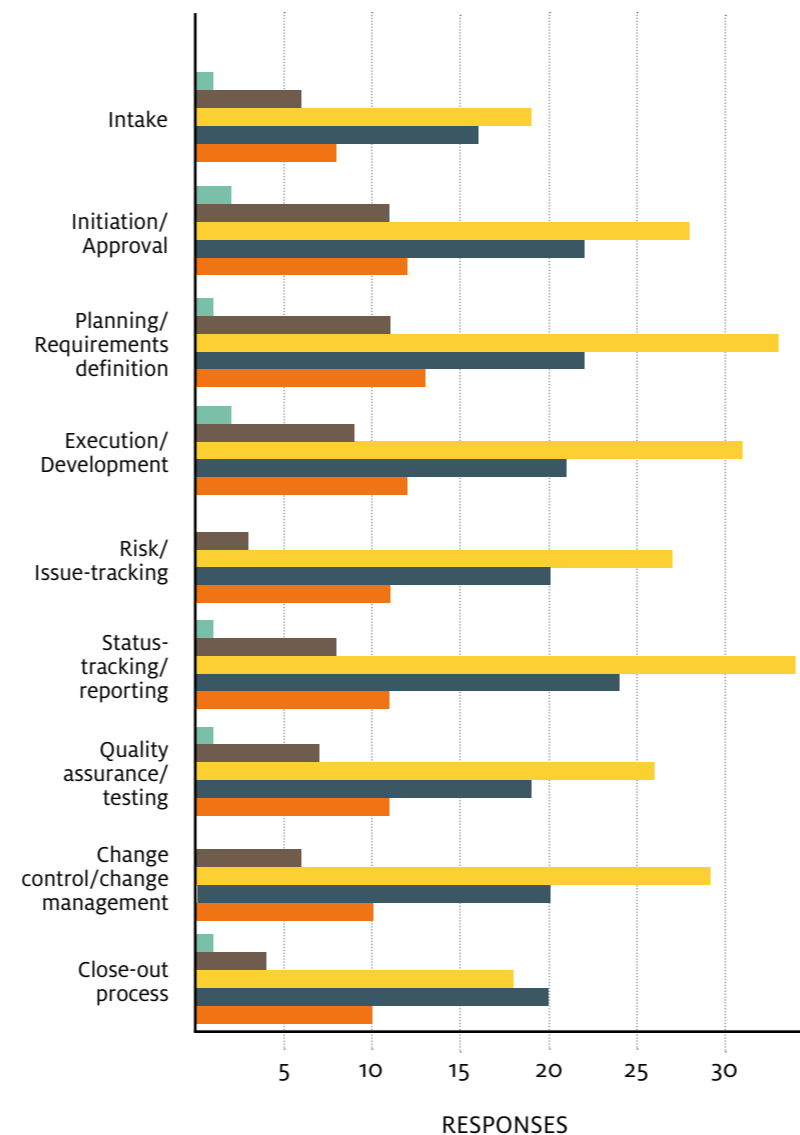
Of the 56 firms responding, 66% reported that a certification was not required for their project managers.



### What processes/stages are included in your organization's approach to projects? (select all that apply)



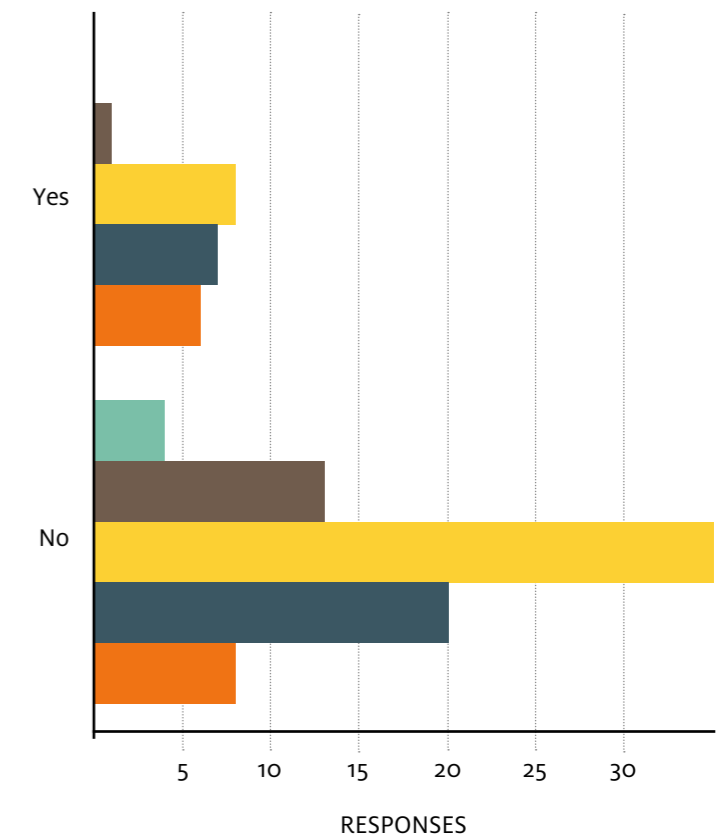
Of the 96 firms that provided data in this area, 25 felt that all 9 processes should be included in the organizations approach to project management, with another 18 placing value on 8 of the 9 areas. Additional processes that were noted included: stage gate process and budget, and effort management and forecasting across projects.



### Does your organization include a formal project steering committee?



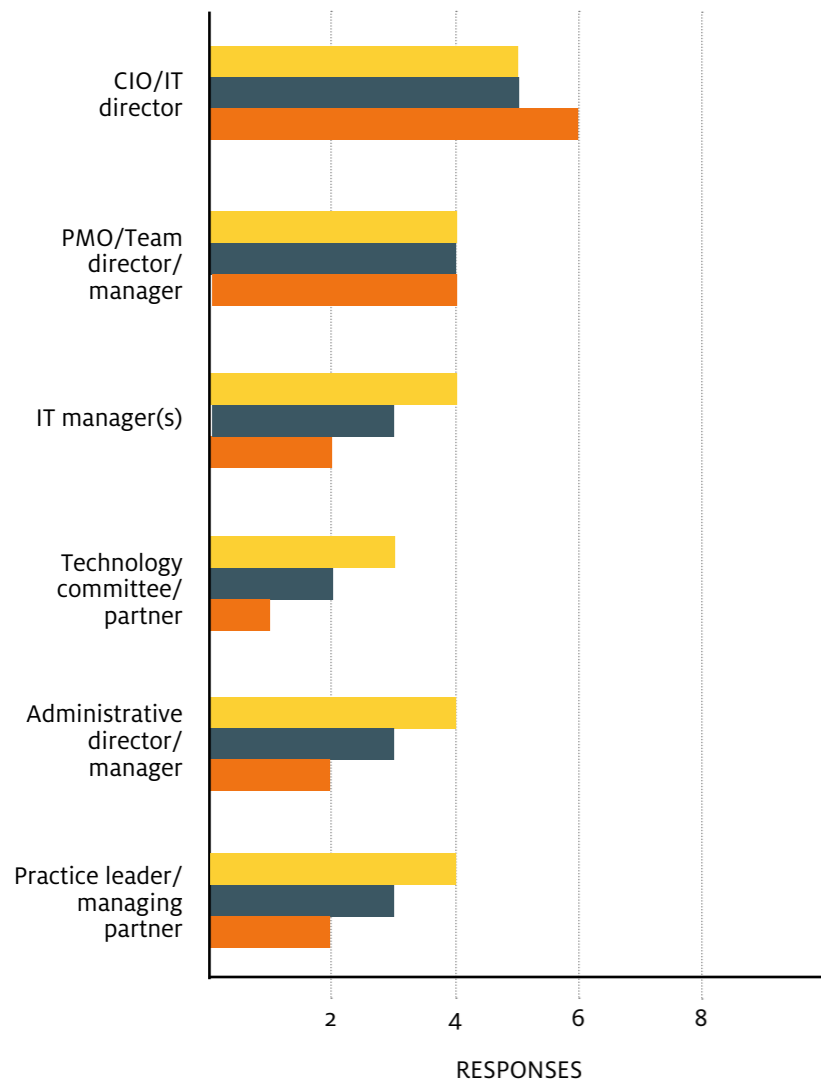
As with past surveys, most firms do not have a formal steering committee for projects. Even firms with an official PMO report that only half have steering committees.



### Who is involved in the project steering committee at the organizational/firm level? (select all that apply)



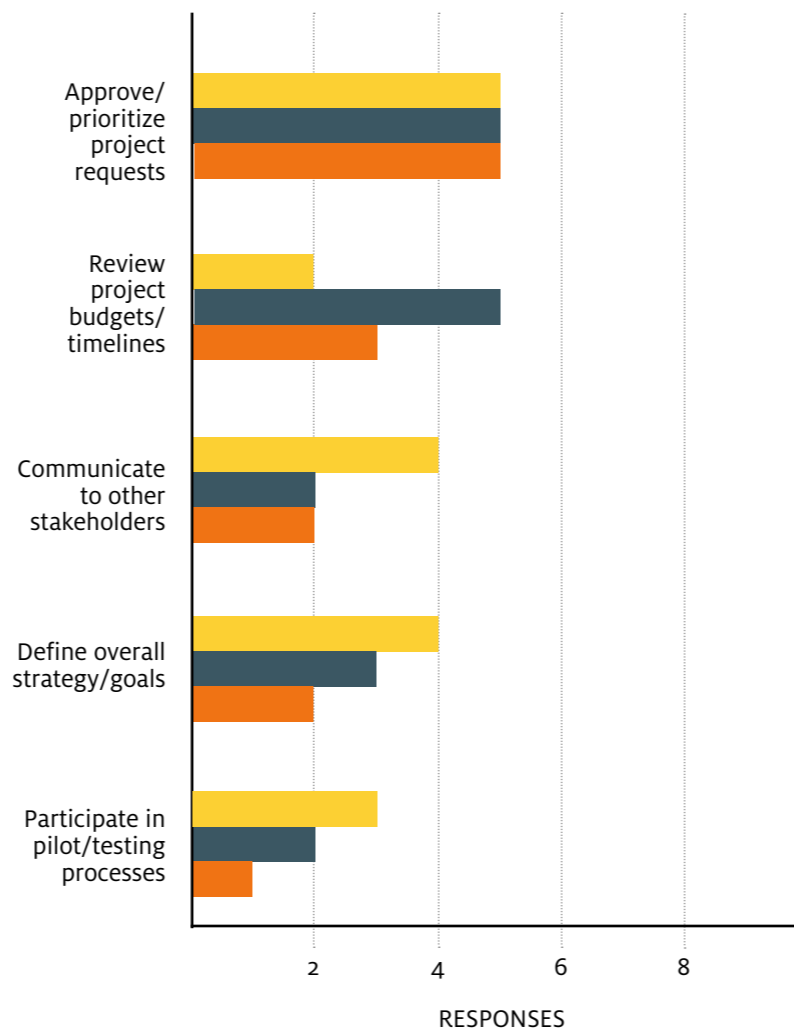
With formal steering committees existing only in large and midsize firms, it is interesting to see that there is more diversity in committee members in midsize firms than in the large firms. Midsize firms reported the most consistency across the various types of individuals included. Other individuals noted as part of the committee include: Senior SME, Information Governance, Chief Operating Officer and Security Office.



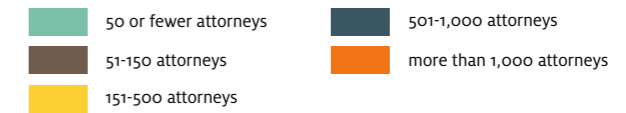
### What are the primary responsibilities of the organization/firm project steering committee? (select all that apply)



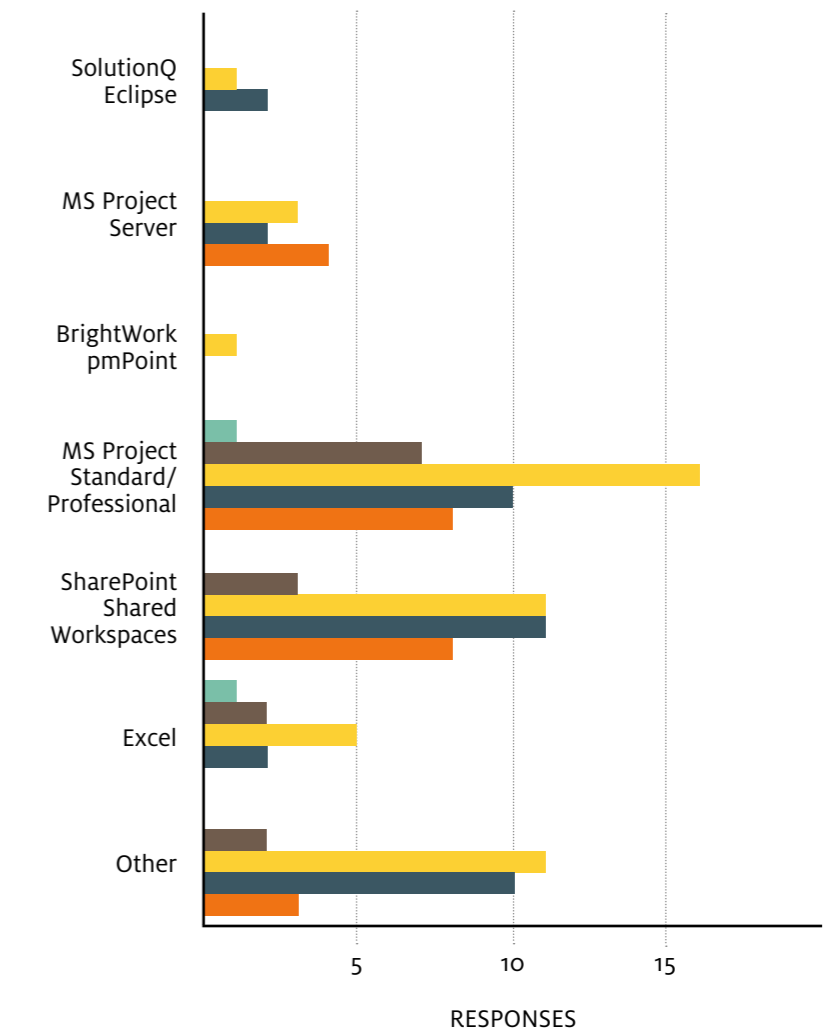
Of the 18 organizations that responded in this section, it is clear that the majority agree that the primary goal of the project steering committee is to approve and/or prioritize project requests. Firms looking to strategically leverage dollars and resources and improve realization may want to consider implementing one or both of these concepts. Other tasks the committee might be expected to perform include: promote project to the firm, handle escalations and issue resolution, and approve implementation.



### What system(s) are used to manage projects? (select all that apply)



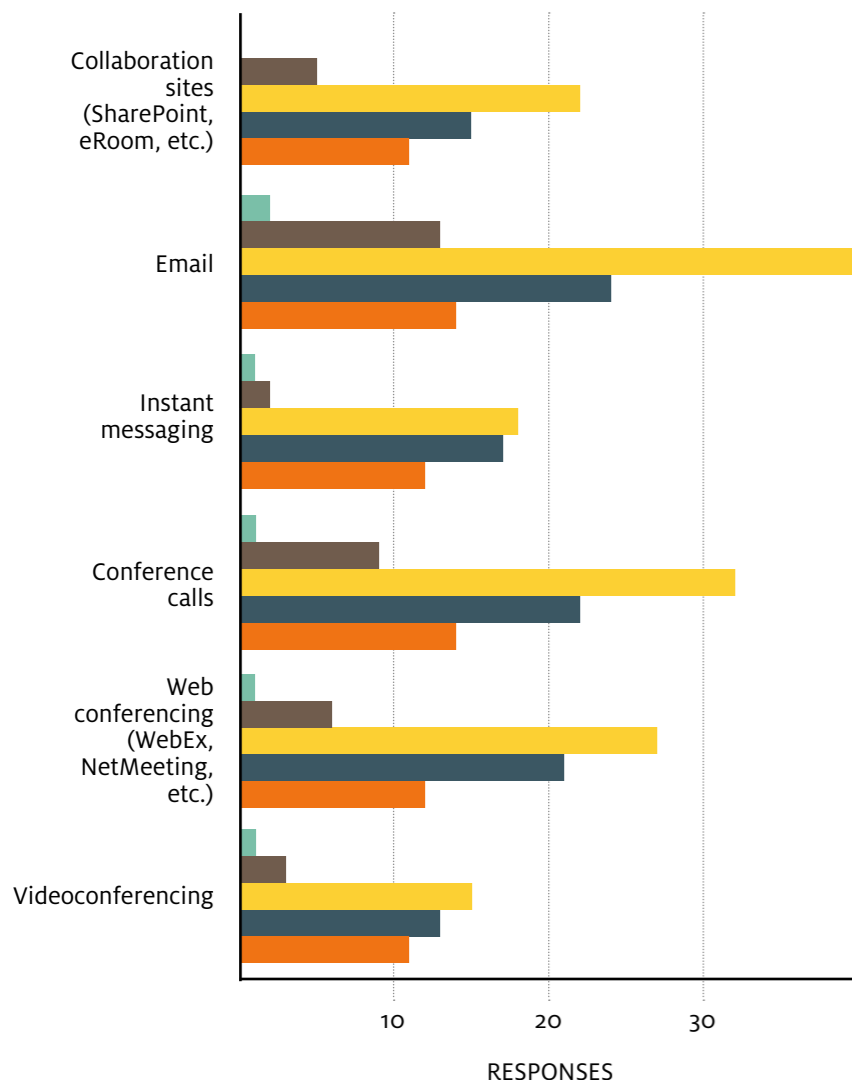
As with past surveys, traditional Microsoft products still dominate the PM toolset with everything from simple Excel spreadsheets to complex projects stored on a MS Project server and SharePoint. One newcomer to the landscape, Smartsheet, is starting to make a showing, as is the project management module in ServiceNow. Others that were noted include: Asana, Cael LPM, FileSite/DMS Workspaces, Gantt spreadsheet, HighQ Collaborate, LeanKit, LiquidPlanner, MindGenius, Prio, Quickbase, Smartsheet, WorkFront/AtTask and Wrike.



### Which communication tools are used by project teams? (select all that apply)



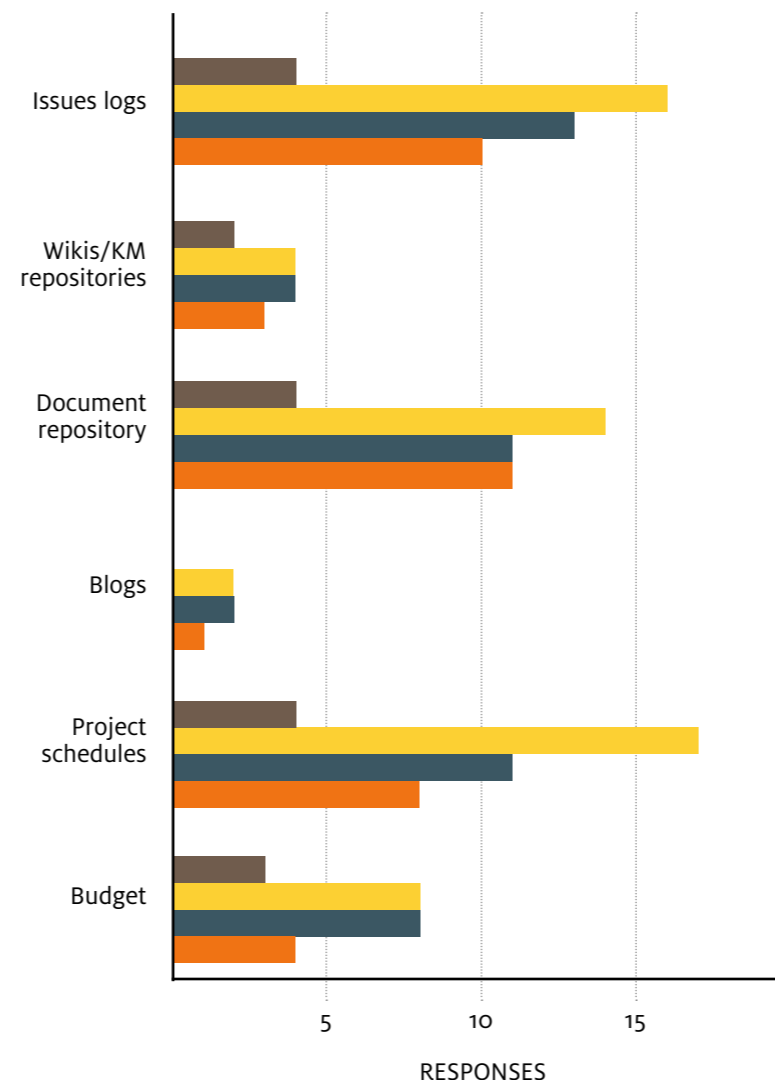
Email and conference calls are still the most common forms of communications, with Web conferencing gaining a growing following as organizations become more decentralized. Respondents also included some of the systems listed in the previous question. It is interesting that in-person meetings was listed as another preferred form of communication by several of our respondents, illustrating that one-on-one discussions are still highly valued in the technical world we live in.



### What components/tools are included in your collaboration sites? (select all that apply)



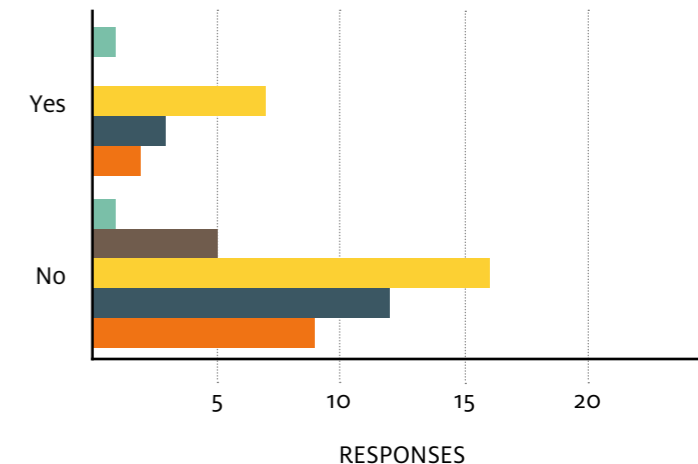
Issue logs, document repositories and project schedules are all critical for most firms that have a formal space for project collaboration. Approximately 80% of firms responding to this section of the survey listed all three as components that would be included in collaboration sites. Other items include task lists and technical documentation.



### Are outside clients or vendors able to view/access the system?



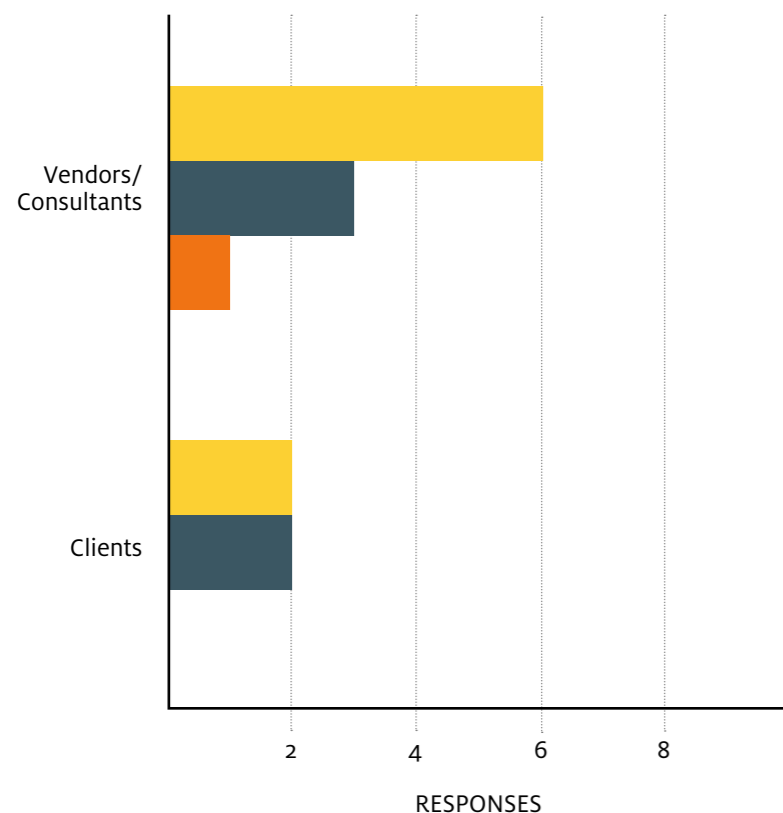
Out of all respondents with collaboration sites, 77% indicated that they are for internal use only, while 23% have made them accessible to clients and/or vendors.



### What external users are granted access to your project collaboration sites? (select all that apply)



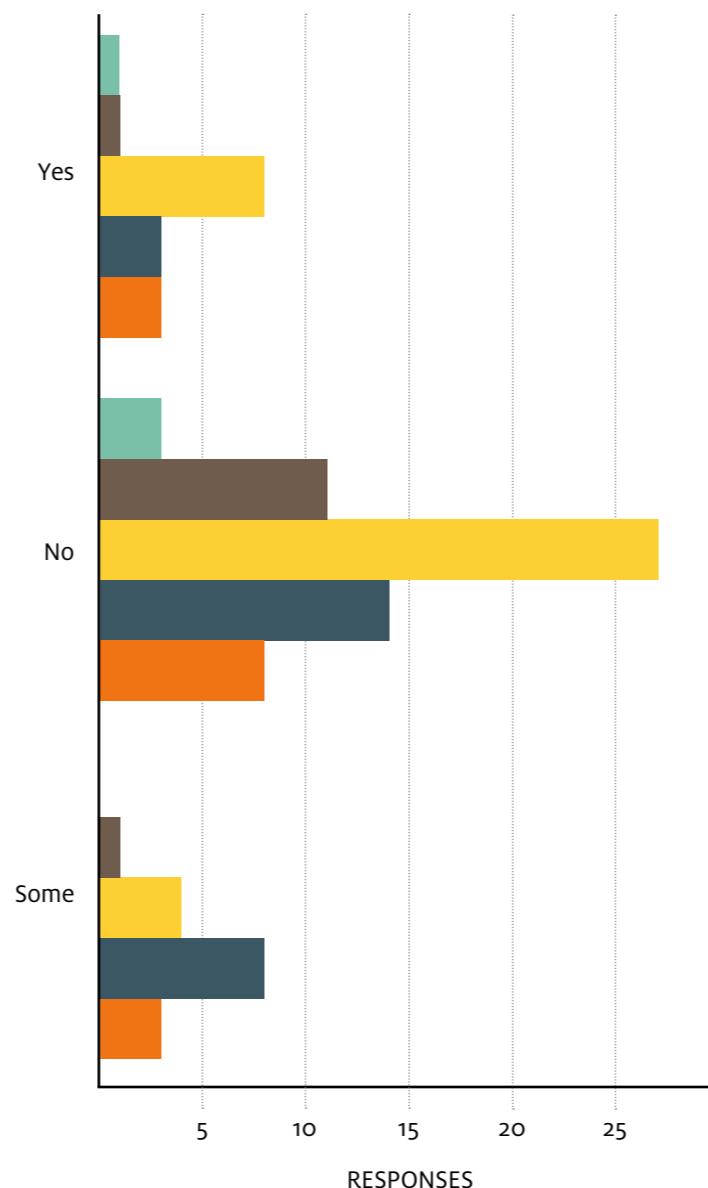
Of the firms responding to this survey, few have made their collaboration sites externally accessible. For those that have, they are mostly available to vendors, with only 4 of the 56 allowing clients to access the information.



### Do project team members track time by project?



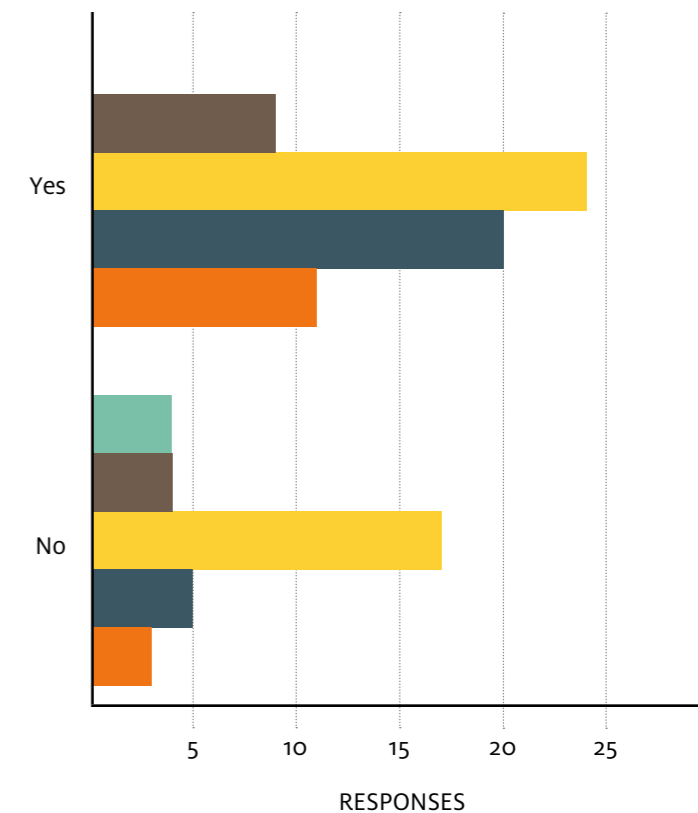
In 66% of the firms that responded, project team members do not track time at all. In the remaining 34%, team members track time depending on outside influences, such as large projects over a specified amount, only when required or for client projects, or at the request of management.



### Do you employ project managers from outside your firm on projects?



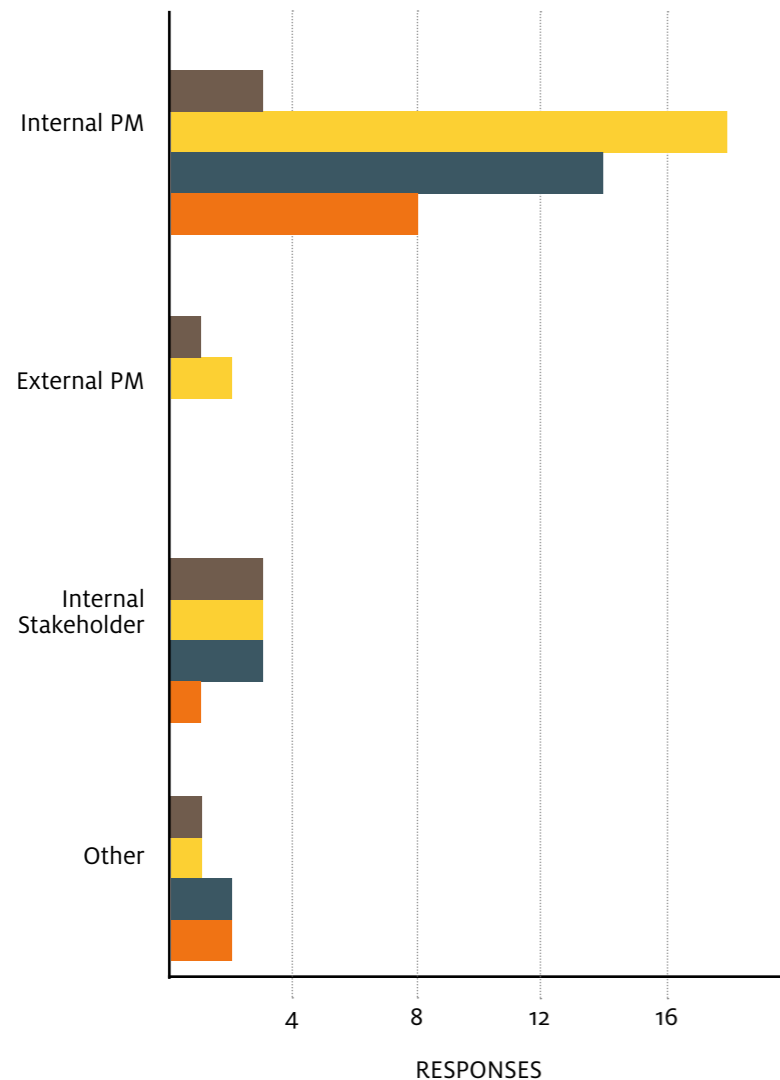
Larger firms are more likely to employ outside project managers than small and midsize firms. This statistic is interesting considering larger firms also have a higher likelihood of having an in-house PM on staff. This likely indicates teaming on projects with outside consultants.



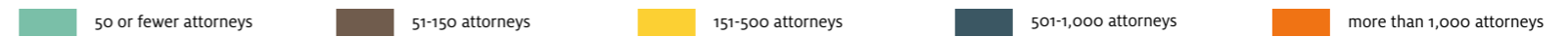
### Who usually assumed the "lead" role in determining the approach to managing the project *i.e.*, processes, procedures, reporting, etc.?



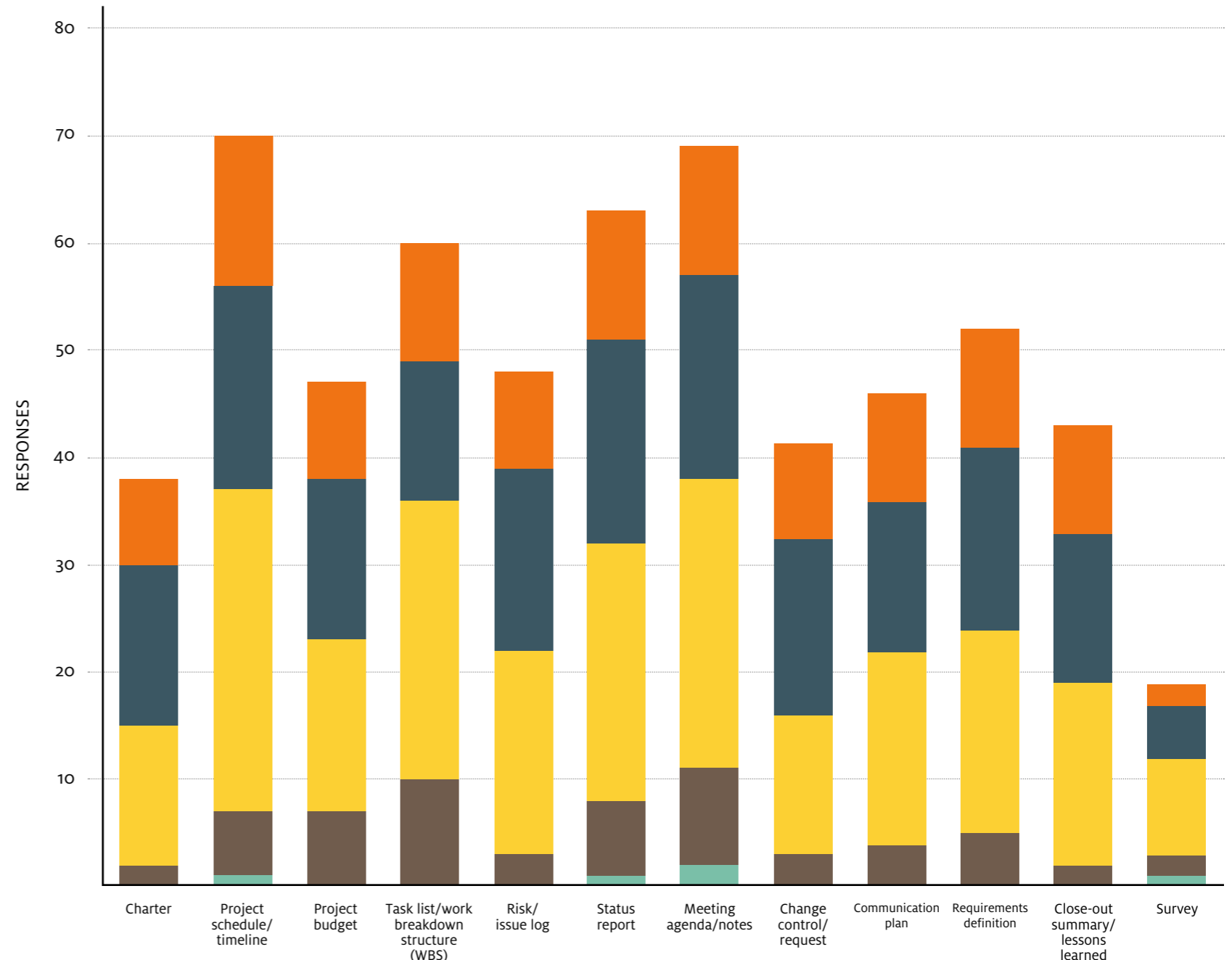
Firms rarely give control of projects to external consultants; rather, they team internal and external resources together. A surprising 16% of organizations give the lead role to the internal stakeholder instead of the project manager. This is a peculiar deviation from traditional project management practices.



### Which types of documentation are typically used for IT projects? (select all that apply)



Project schedule/timeline and meeting agendas and notes were cited as the top two documents typically used in IT projects. Status reports and task lists were noted as also very important. Results were consistent regardless of firm size. Project charters were used by only 43% of the organizations responding.

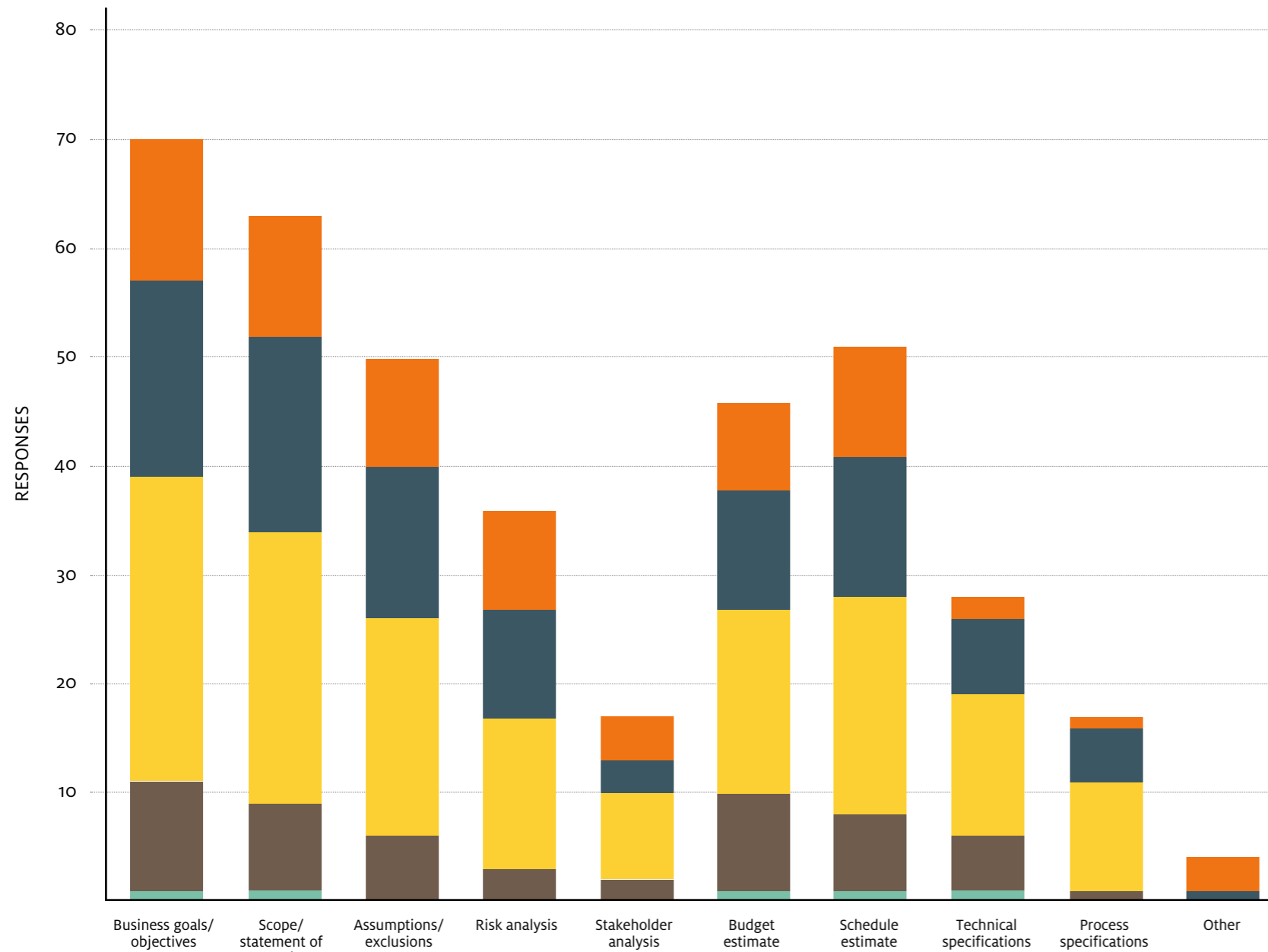




## Which areas are typically addressed in a project charter or business case document? (select all that apply)

50 or fewer attorneys    51-150 attorneys    151-500 attorneys    501-1,000 attorneys    more than 1,000 attorneys

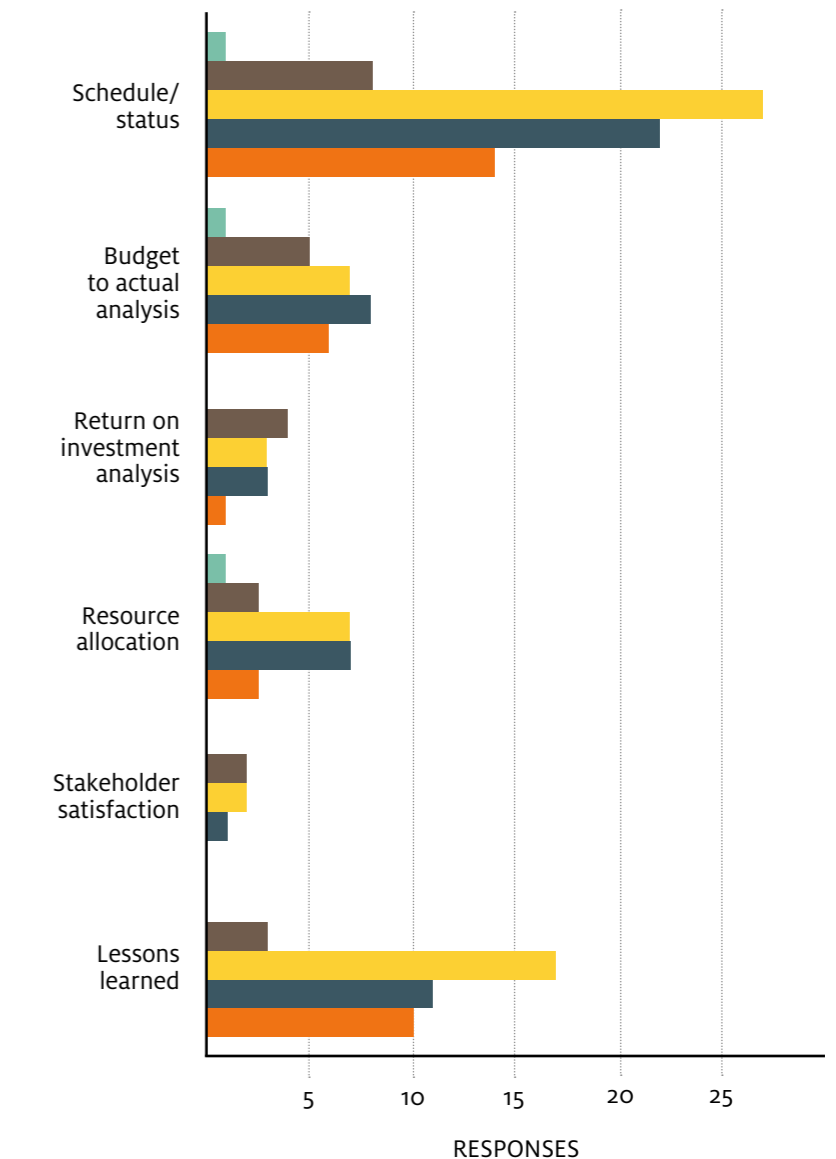
The majority of the firms responding in this category use the project charter to define the business goals for the project and the statement of work. Additional items that might be noted in this document include: training requirements, impact on user community, impact to firm clients, high-level resource requirements, project governance definition, benefits narrative and dollar amount, solution approach narrative (business target state), and project background (business current state). One firm notes "We do not use a charter. Requirements are documented in a requirements document."



## Which types of reports are created for a typical project? (select all that apply)

50 or fewer attorneys    501-1,000 attorneys  
 51-150 attorneys    more than 1,000 attorneys  
 151-500 attorneys

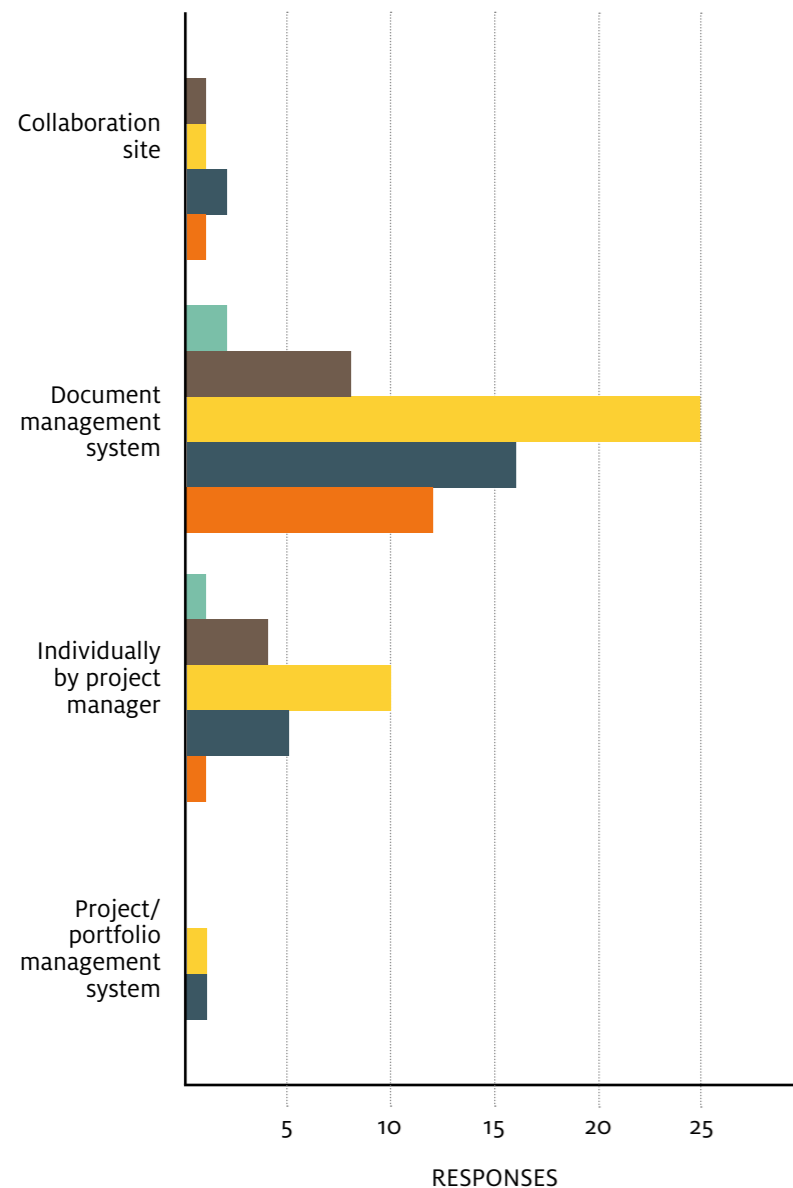
Schedule/Status reports are the top report for projects, created by 94% of the respondents to this portion of the survey. Surprisingly, financial reports such as budget to actual and ROI are created by less than 35% and 14% of the respondents respectively.



## How are project documents managed?



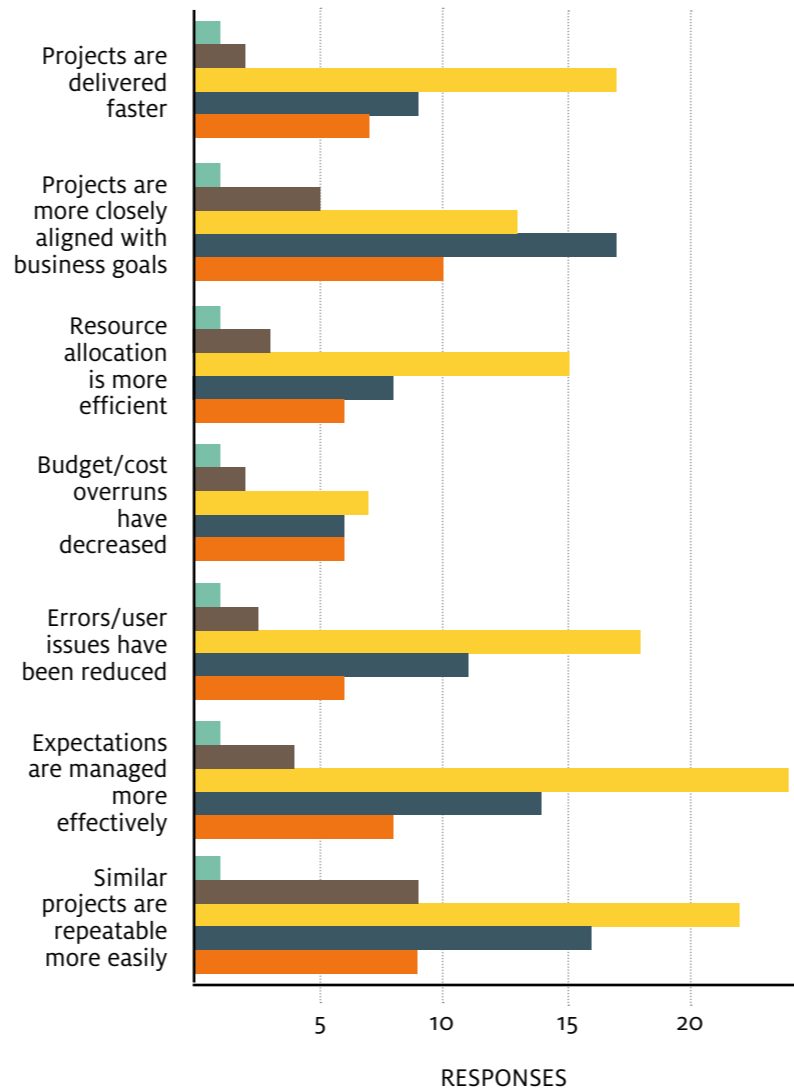
The majority of firms use the firm's document management system to manage project documents.



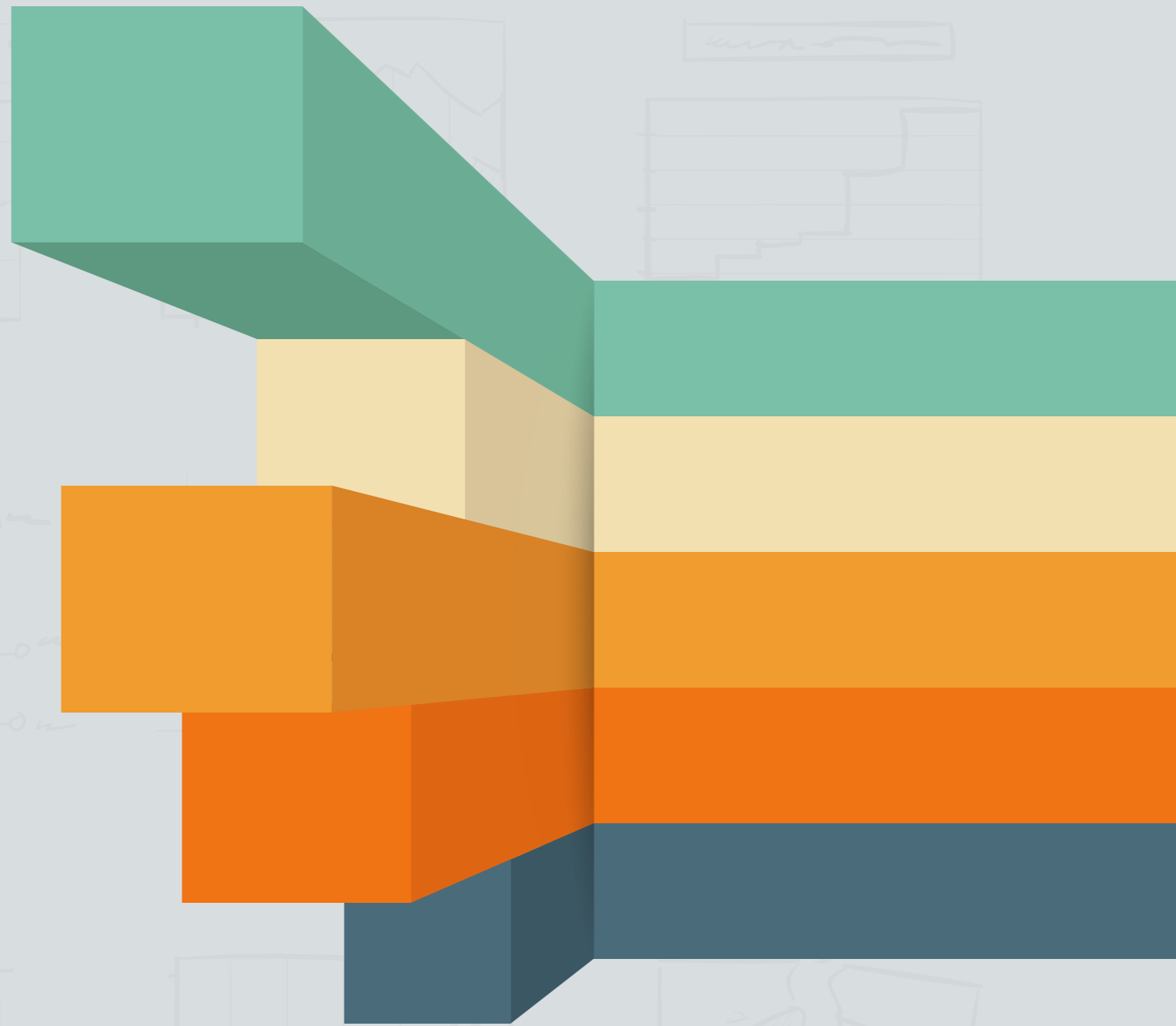
## What impact has project management had on your organization? (select all that apply)



Most firms responding feel that project management has a positive impact on the organization. Top benefits include that similar projects can be more easily managed and expectations are managed more effectively. Additional thoughts provided include: a road map of what work is being done and when can be provided, communication is better with clients on plans, IT and the other departments have a better understanding of the overall work of IT, and CIO has support.



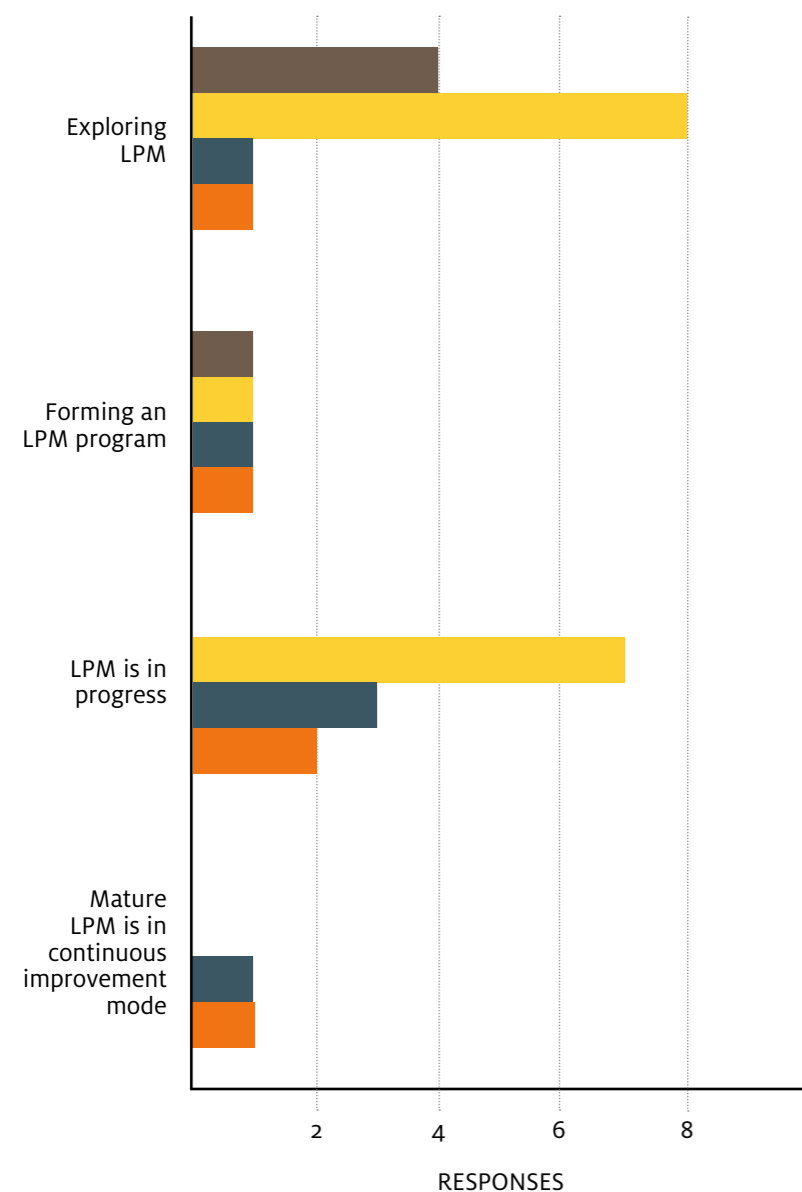
# Legal Project Management



### Which statement best describes the stage in which your LPM program is in?



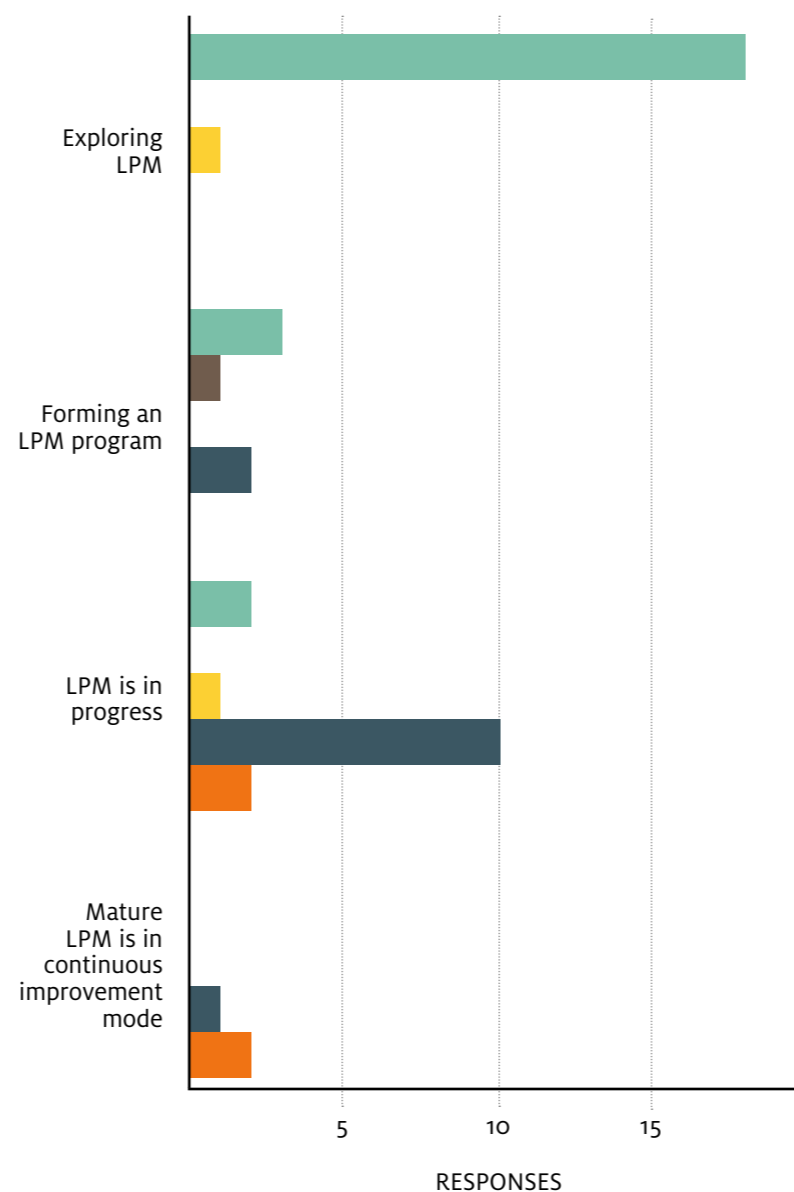
Of the 105 responses in this portion of the survey, 35 firms opted to answer questions regarding legal project management (LPM). Many firms are considering LPM or working on their LPM programs at this time.



### How long has your LPM program been in existence?



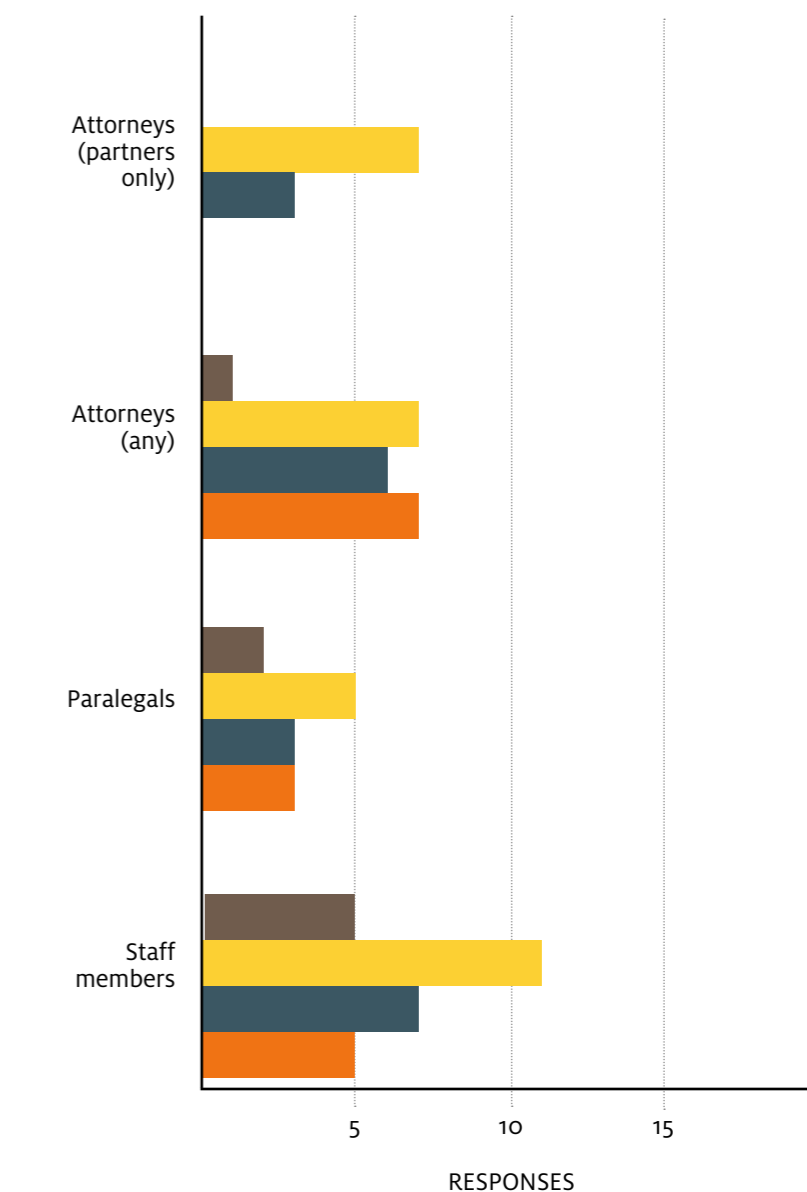
LPM is relatively new in most firms, with 60% of the responses indicating a program that is under 1 year old and 30% under 3 years old.



### Who fulfills the role of legal project manager? (select all that apply)



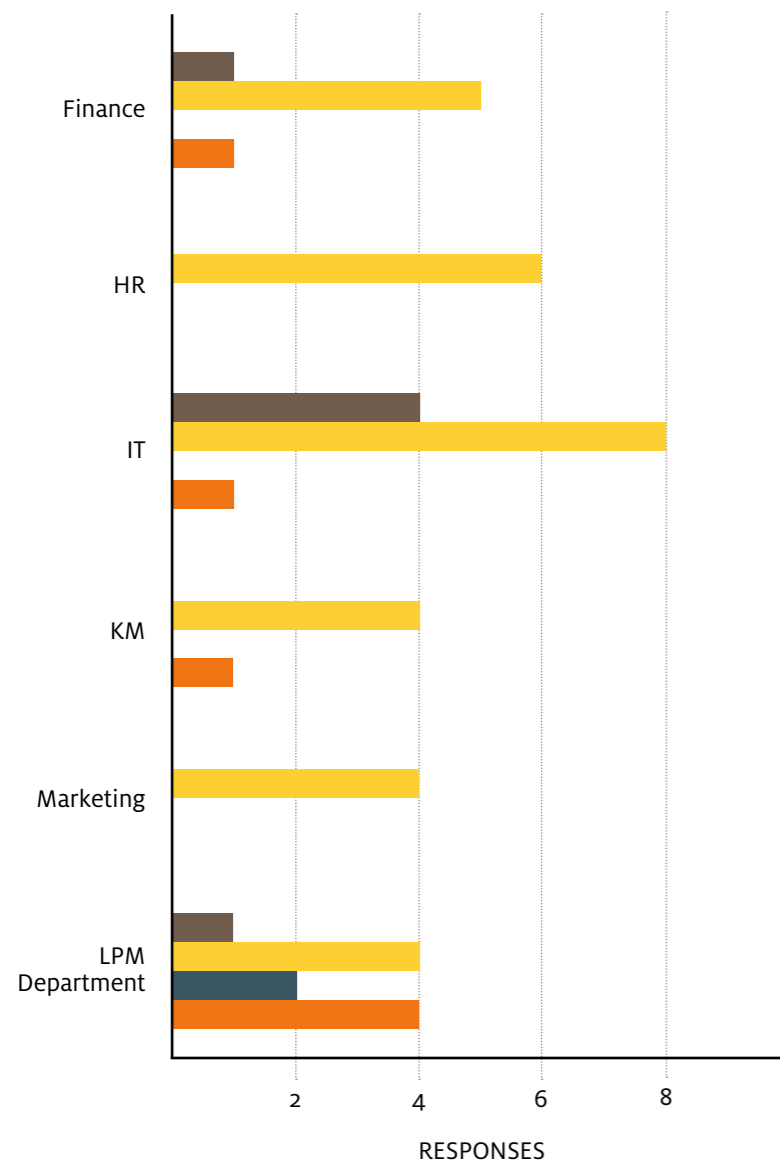
Attorneys and staff members are used equally to fill the role of project manager.



### Which groups are involved in providing project management resources?



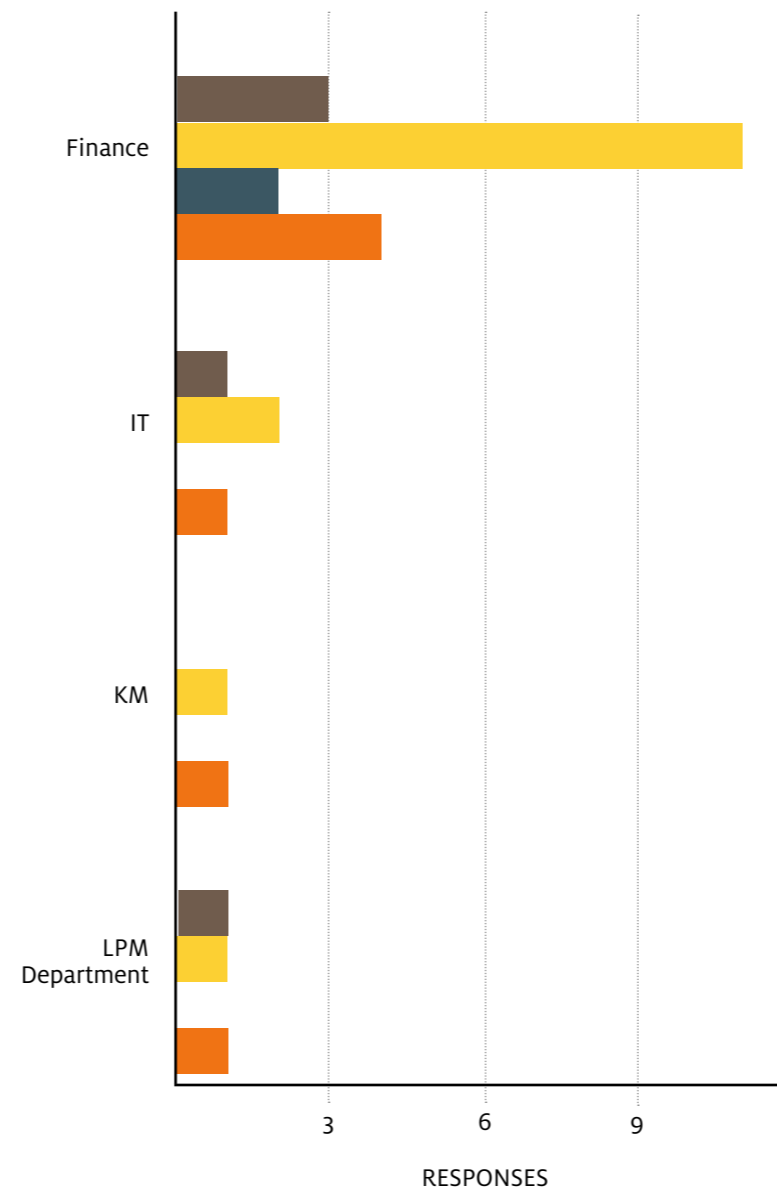
While we received the most responses from midsize firms, those same firms indicated they relied on resources from each area of the firm for project management support. Conversely, larger firms with established LPM offices generally handle everything with resources within that department.



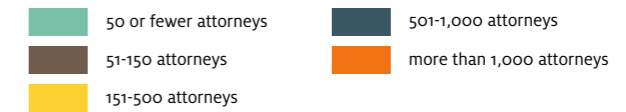
### Which groups are involved in providing pricing and cost data for LPM?



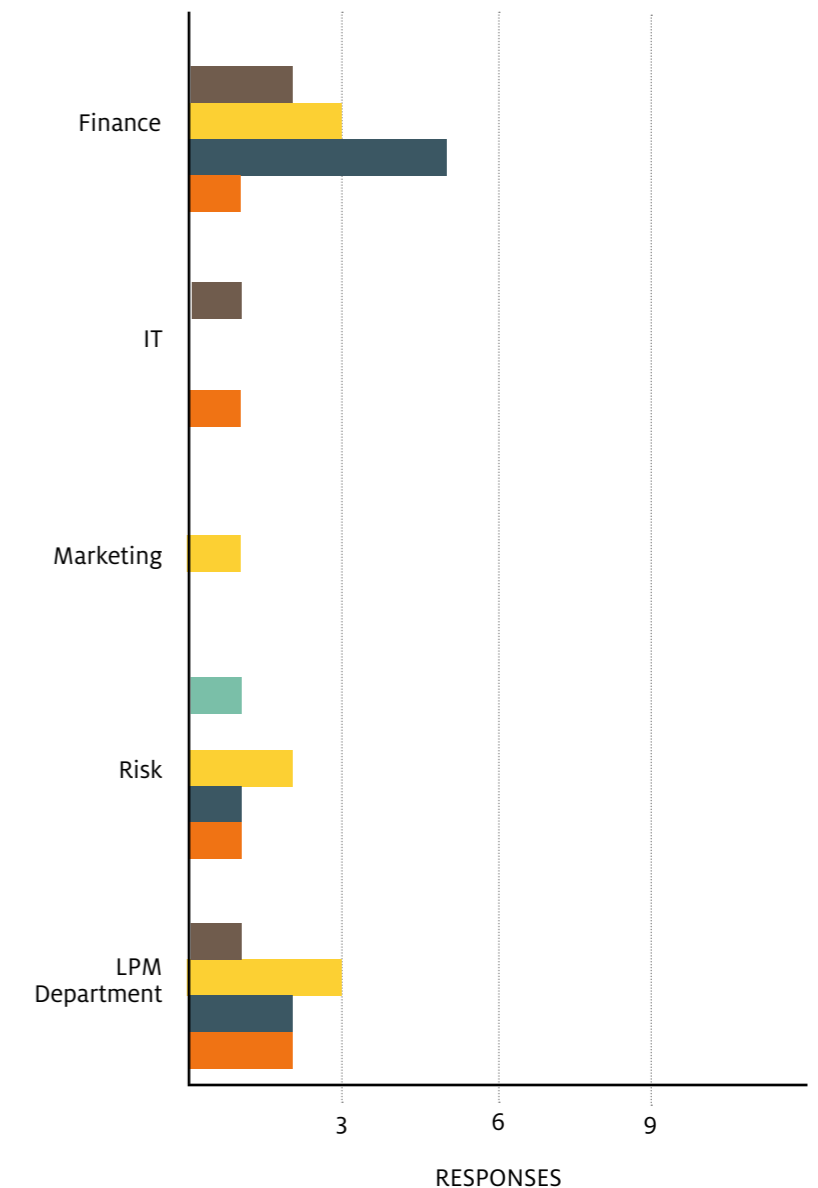
In almost every response, the finance department was indicated as a resource for LPM pricing and cost analysis. In addition, 20% of the respondents used resources in IT to assist with this.



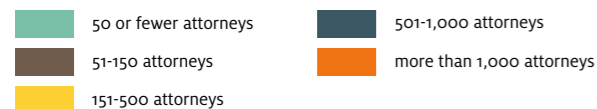
### Which groups approve new AFA proposals?



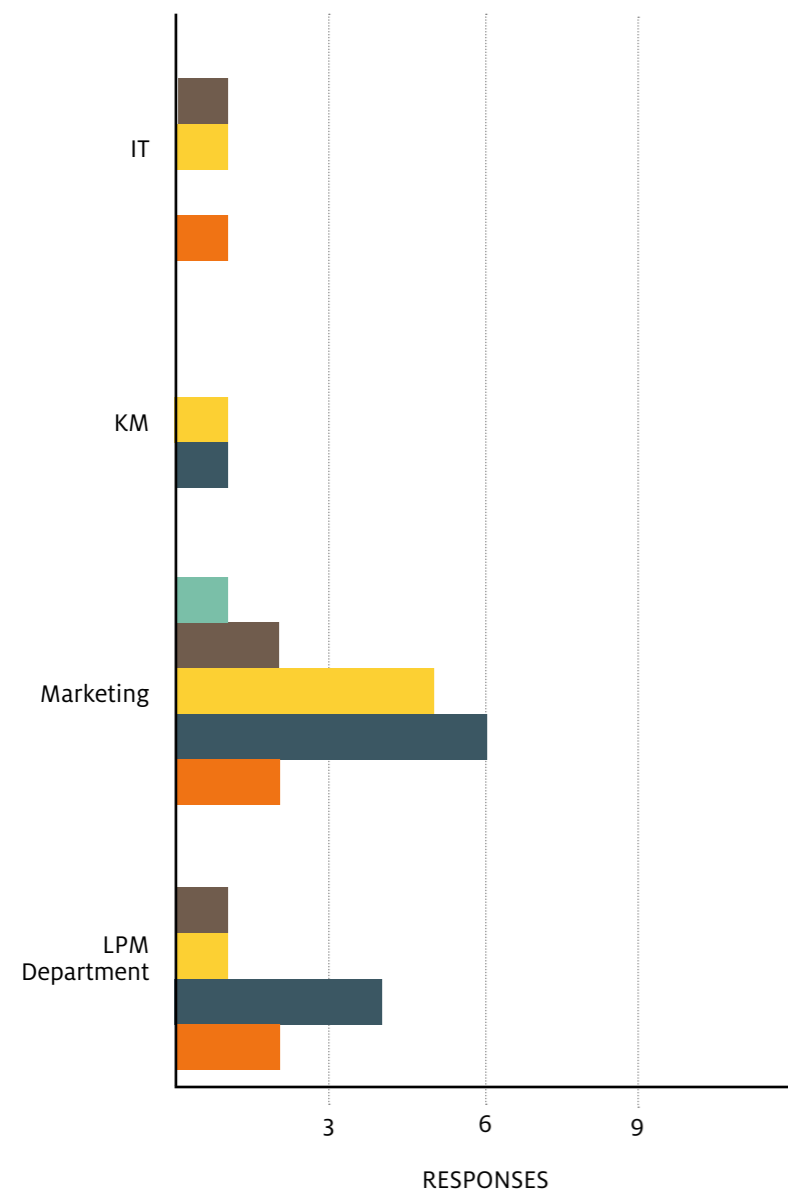
As with pricing, the finance and LPM departments are most likely to support the approval of new AFA proposals.



### Which groups use LPM in marketing material to promote the firm?



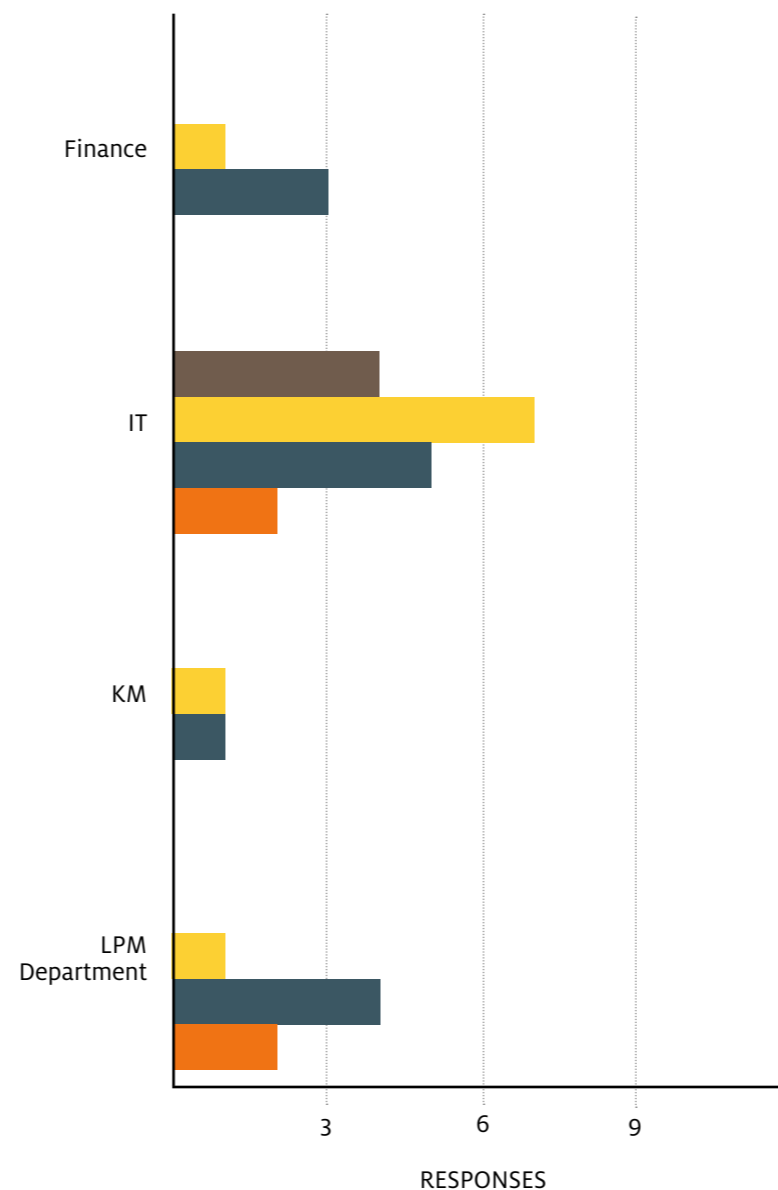
It is no surprise that most firms responding state that the marketing department uses LPM in marketing materials. 44% of the firms responding have marketing materials created by their LPM department as well.



### Which groups provide software tools?



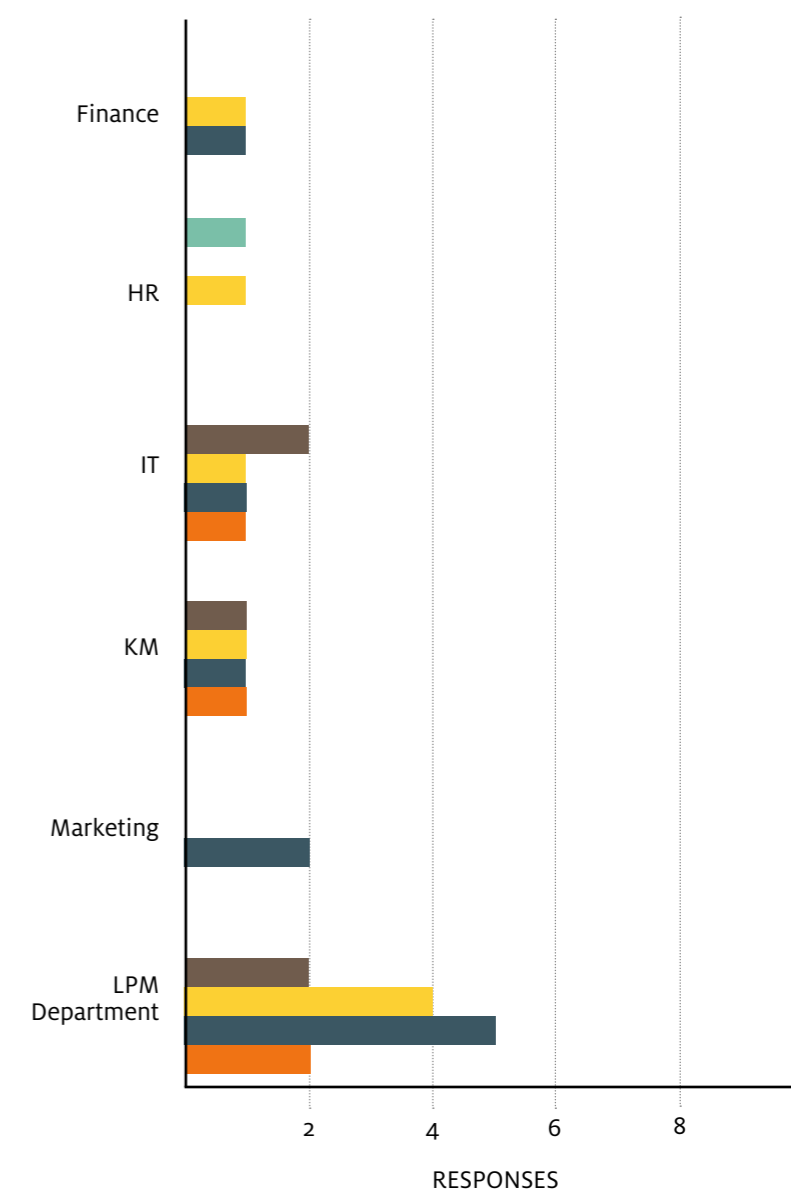
While most software is delivered by the IT departments, finance, LPM and KM all contributed to software support for LPM in 62% of firms that responded to this portion of the survey.



### Which groups promote/sponsor LPM education?



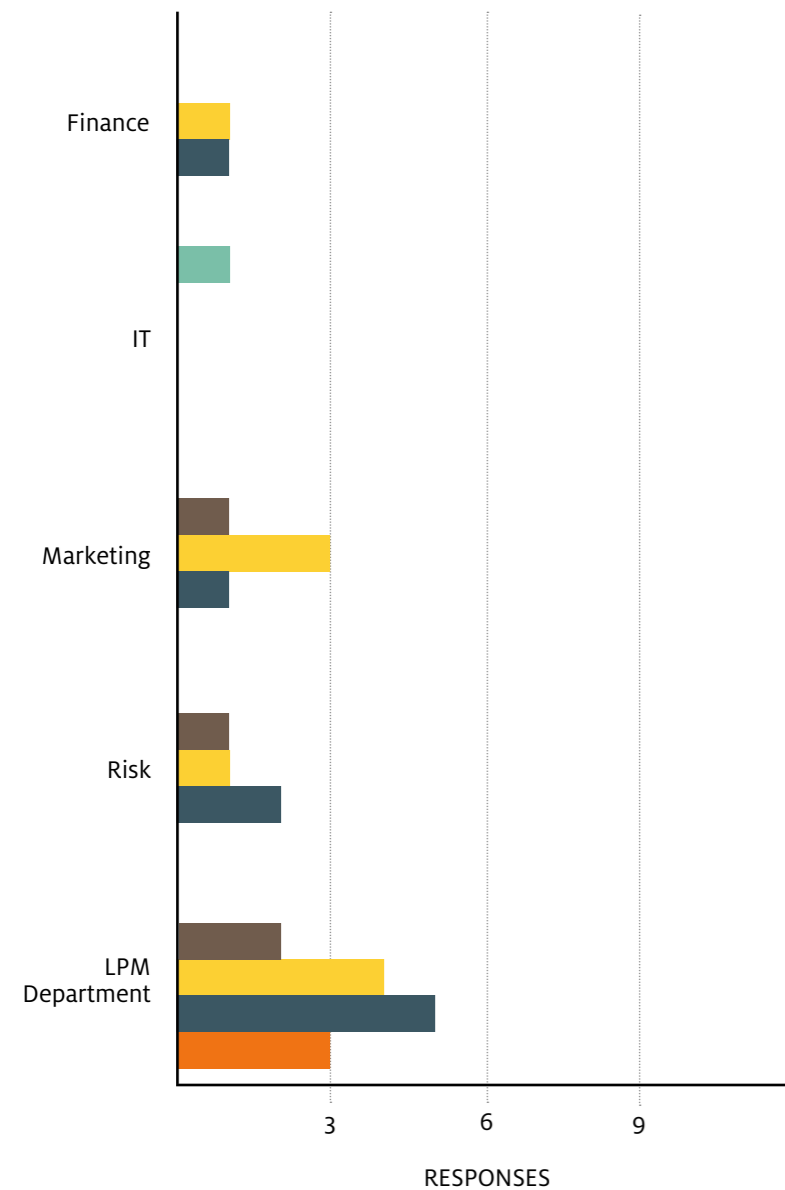
Firms with LPM departments rely on that department for about 50% of the LPM education in the firm. Other departments that participate include finance, HR, IT, KM and marketing.



## Which groups create and maintain LPM templates?



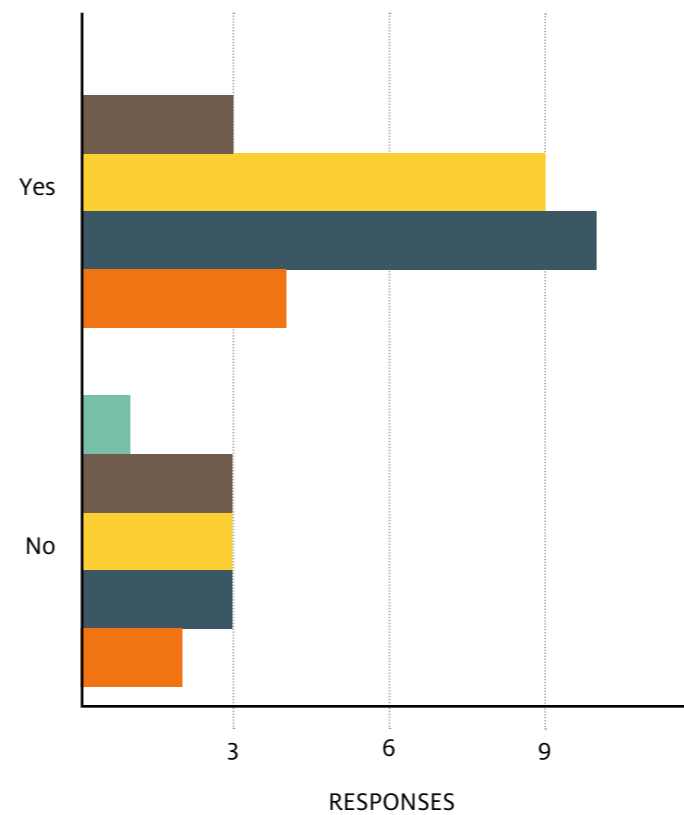
Half of the organizations that responded to this section of the survey indicated that they had LPM templates in place. Of those, 67% are maintained by groups other than the LPM department.



## Are your legal project managers client-facing?



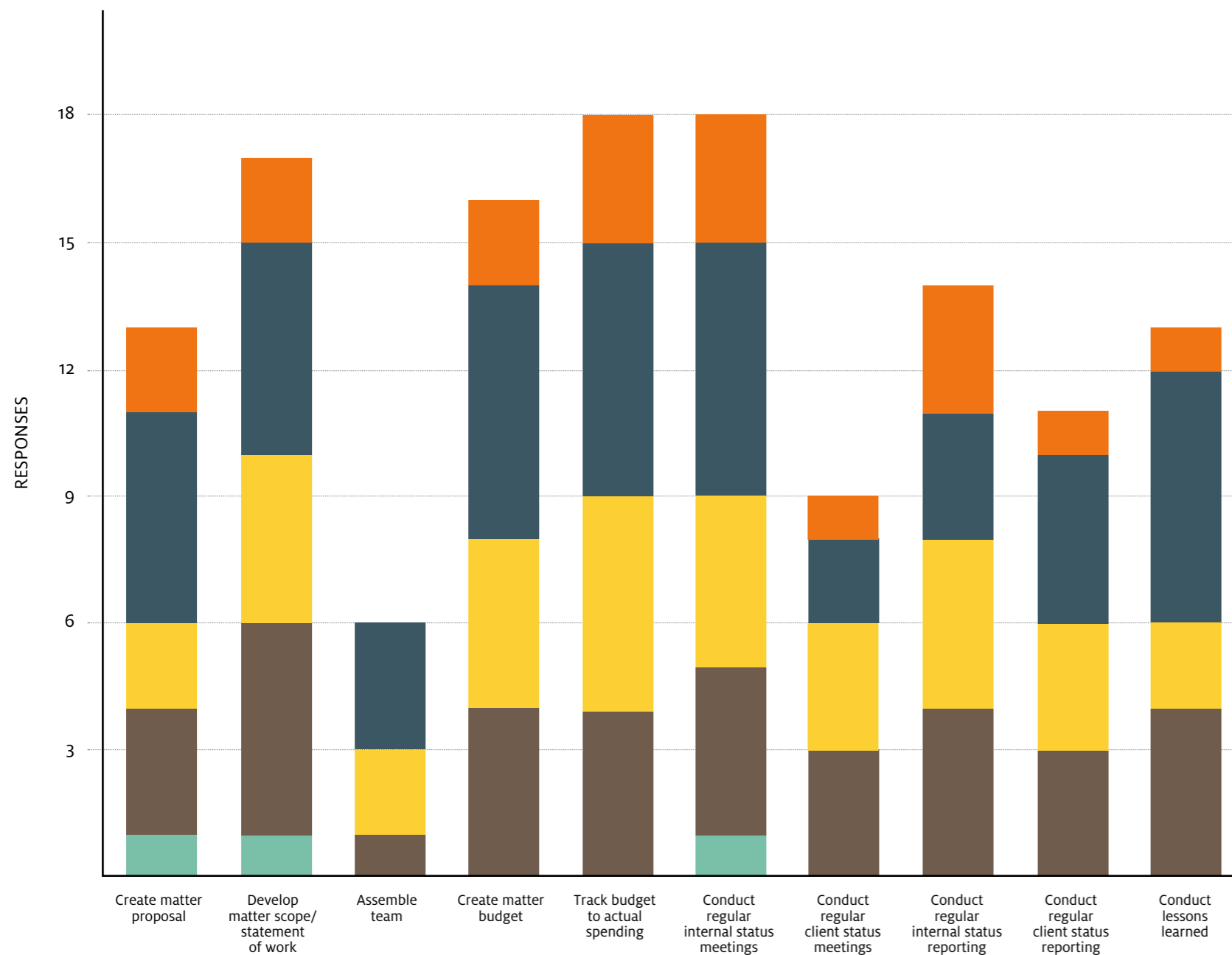
While the majority of legal project managers are client-facing, the split is even when it comes to midsize firms.



## What LPM activities typically occur on matters where LPM is used at your firm? (select all that apply)

50 or fewer attorneys    51-150 attorneys    151-500 attorneys    501-1,000 attorneys    more than 1,000 attorneys

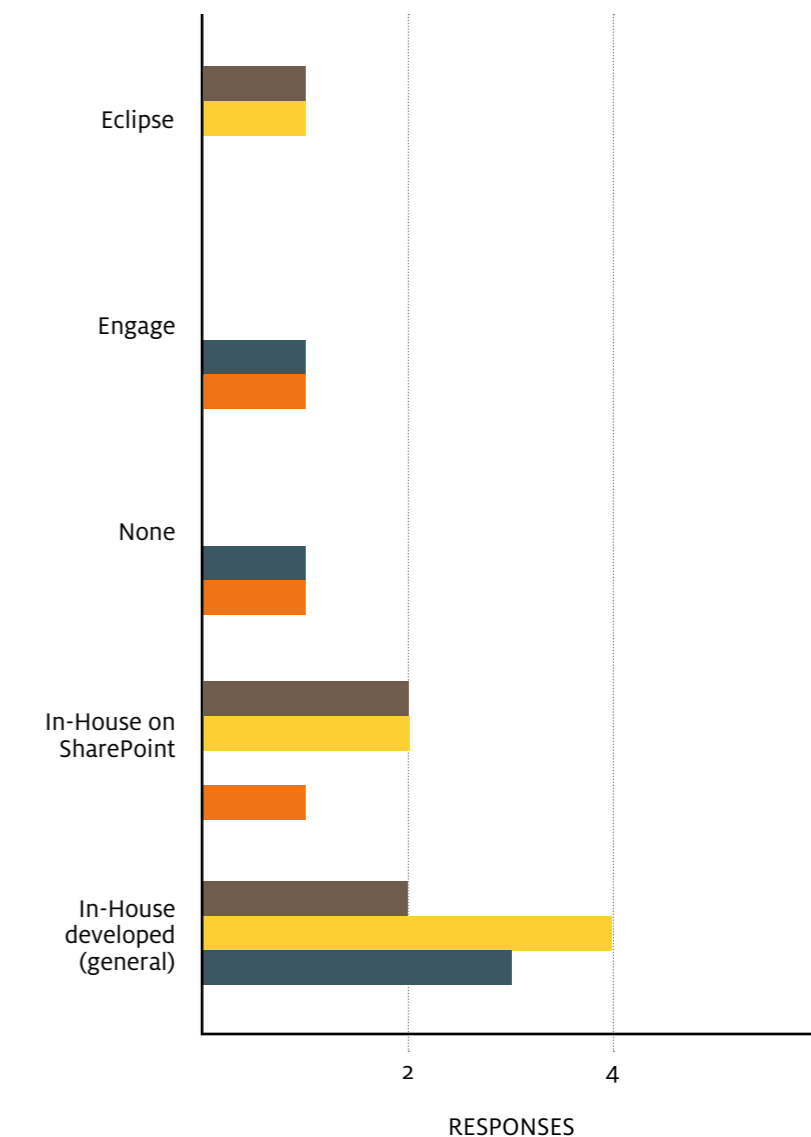
Top activities for the LPM department included: track budget to actual spending, conduct regular internal status meetings, and develop matter scope/statement of work.



## What LPM tools do you use? (select all that apply)

50 or fewer attorneys    51-150 attorneys    151-500 attorneys    501-1,000 attorneys    more than 1,000 attorneys

In-house solutions are most common at 82% of the total when combining solutions built on SharePoint and other platforms. Platforms that were not listed but are in use and noted by respondents include: Cael, Smartsheet, Outlook Public Folders, Office and MS Project, and the document management system using Word and Excel.

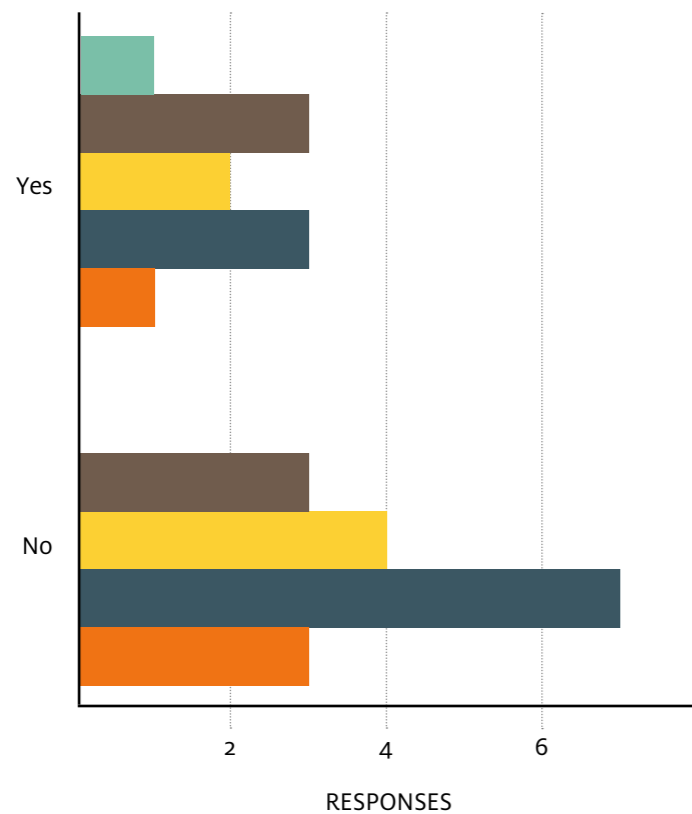




### Do you have a client dashboard solution to share information about a case/matter with clients?



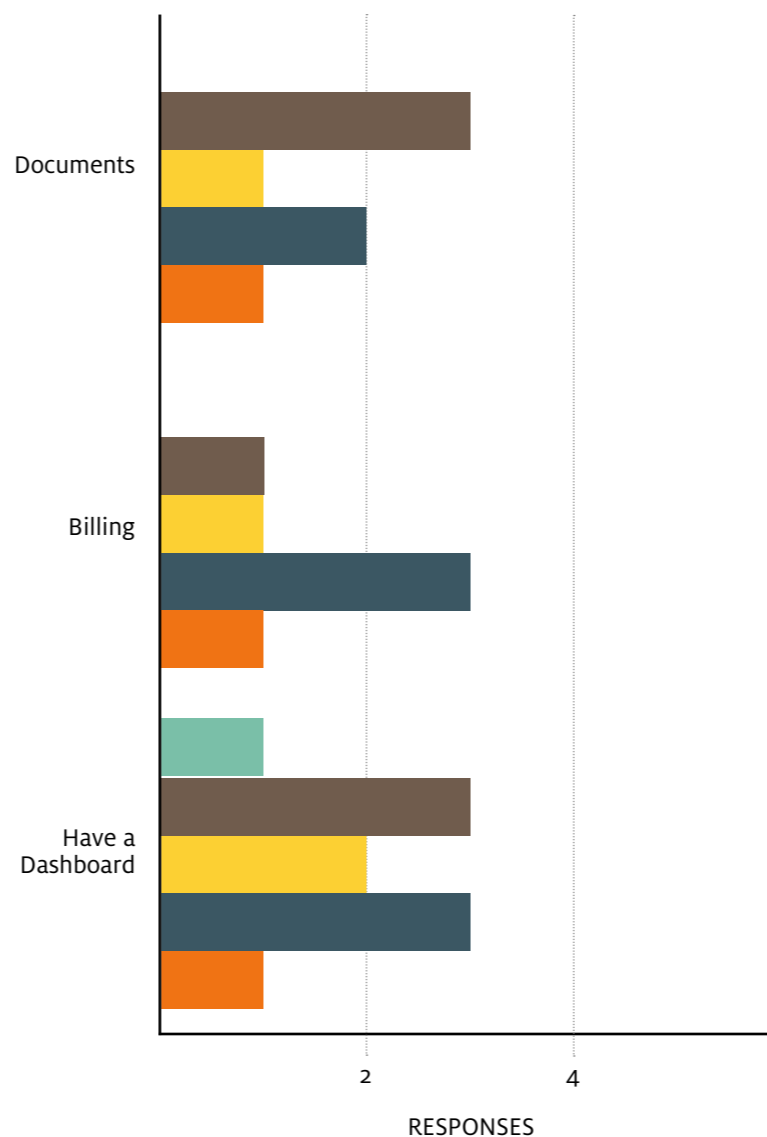
In large firms client access to information via a solution dashboard is at about 30%. Small and mid-sized firms more regularly use this type of tool, at 37%.



### Do you provide clients with access to documents or billing information on the dashboard?



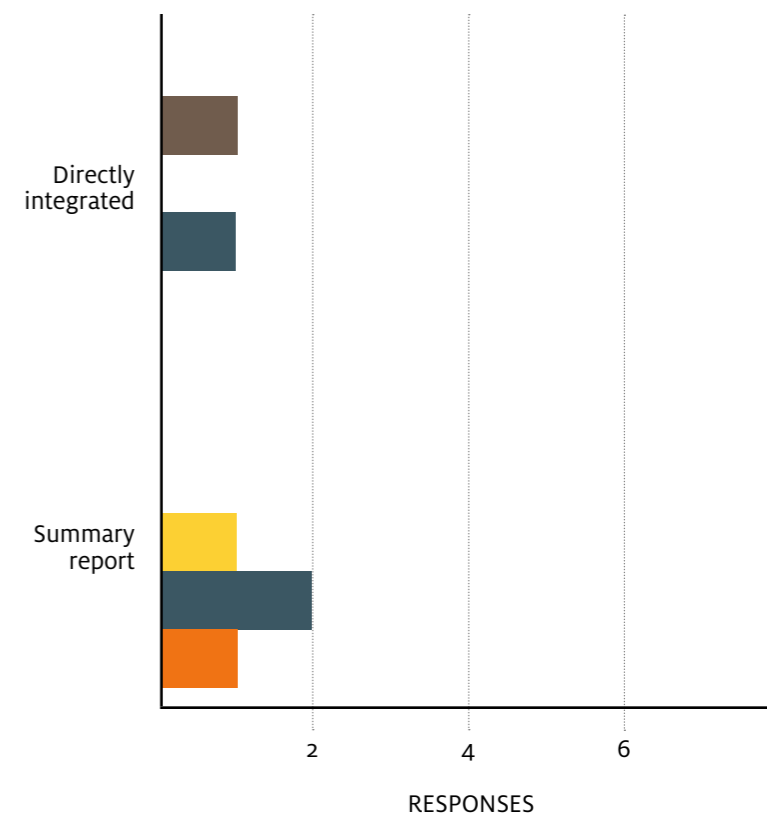
Of the firms that reported having a client dashboard solution, 70% provided access to documents and 60% provided access to billing information.



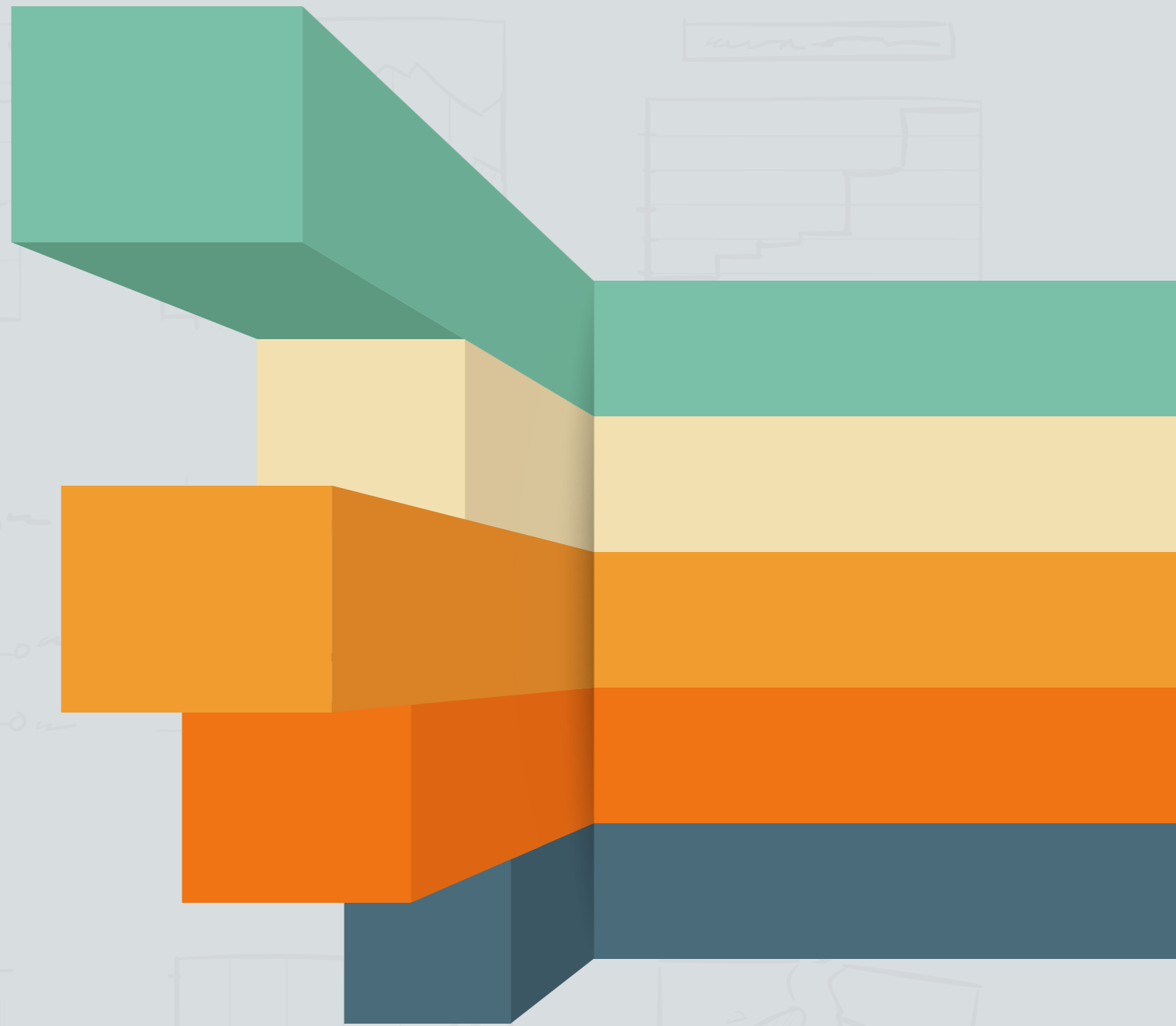
### Is the billing information directly integrated or is the info a summary report?



Firms providing billing information on their dashboard were twice as likely to provide this information in a summary form than as a direct integration to the billing system.



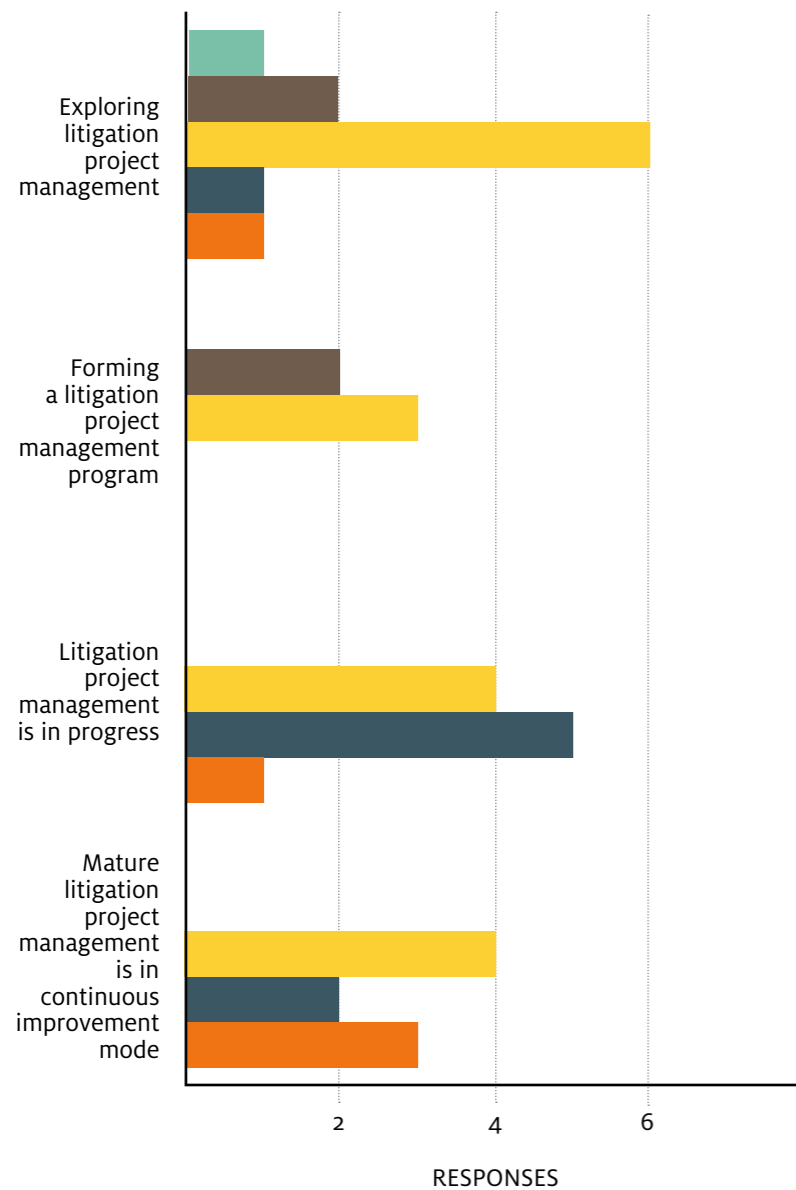
# Litigation Project Management



### Which statement best describes the stage in which your litigation project management program is in?



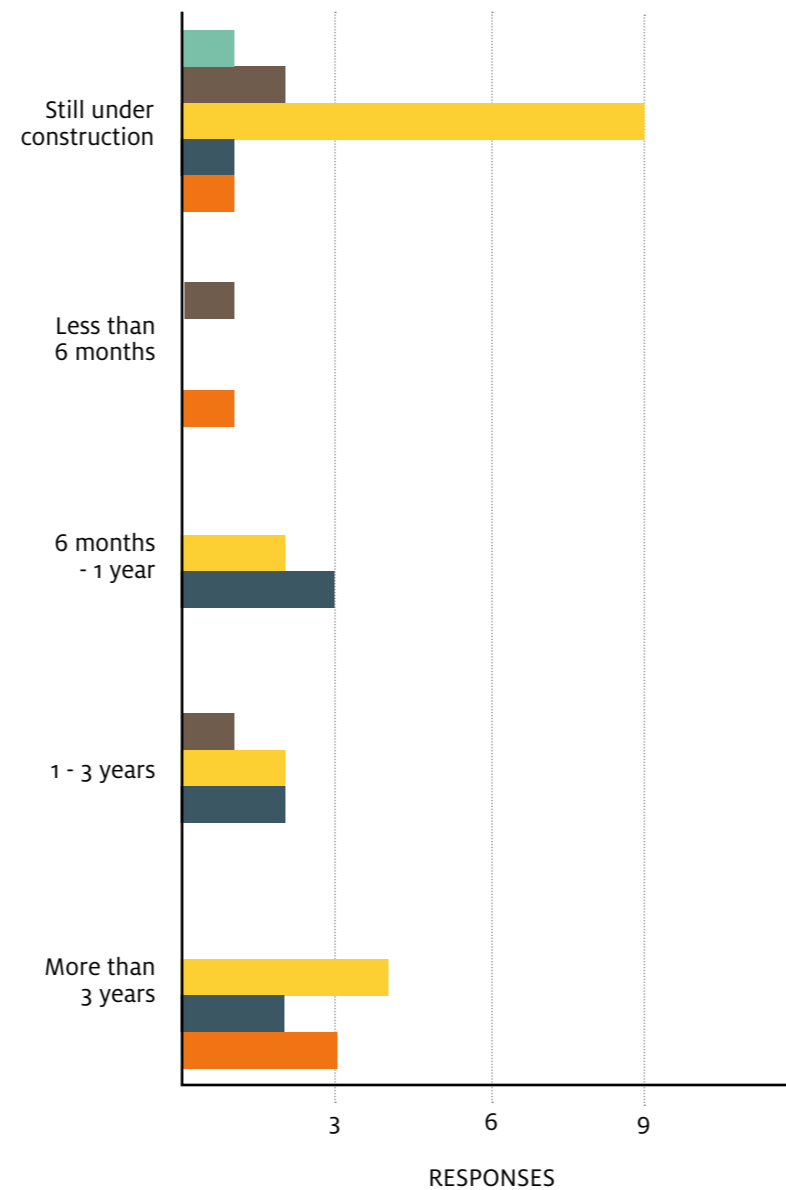
The majority of responses, 49% of the total, in this category came from firms having between 151-500 attorneys. Firms were evenly divided with programs that were either in consideration, in progress or mature, with only 14% in the forming stage.



### How long has your litigation project management program been in existence?



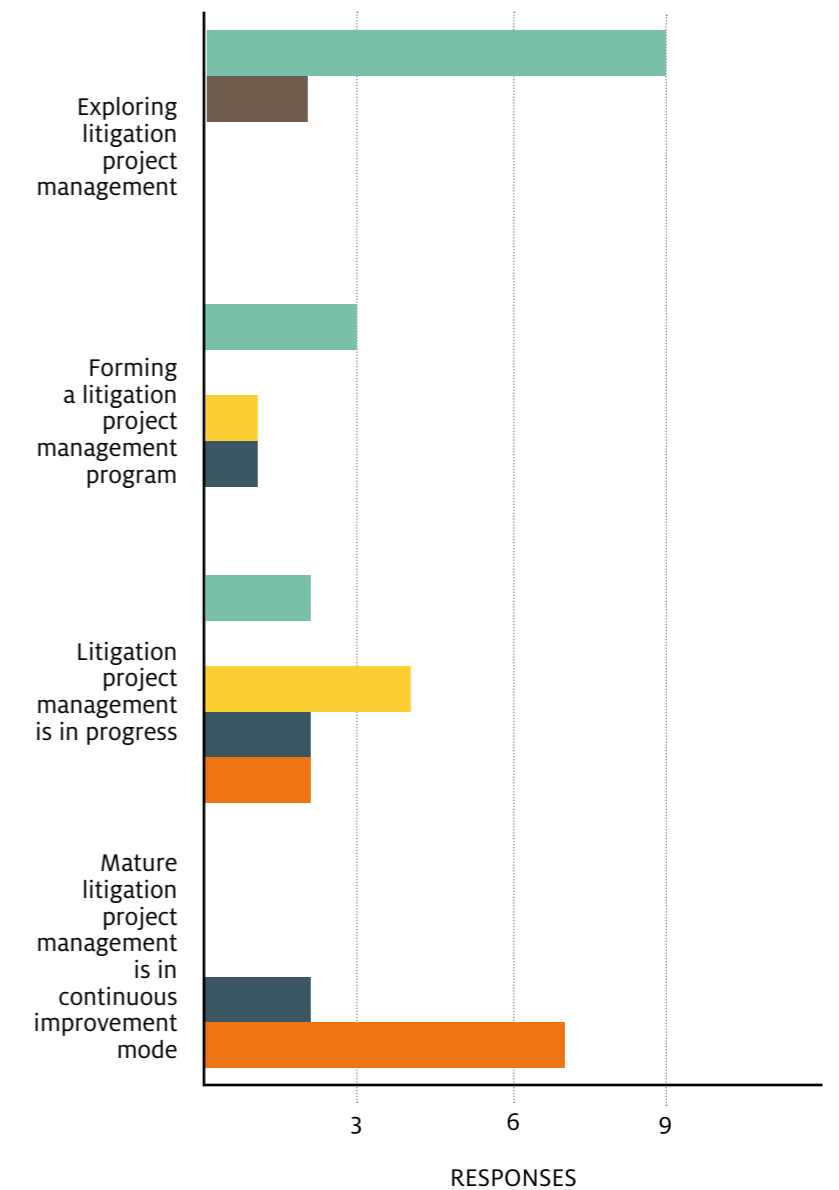
The majority of the firms responding list their departments as still under construction, with 26% reporting programs that have been in place for more than 3 years.



### Comparing duration of litigation support program to stage:



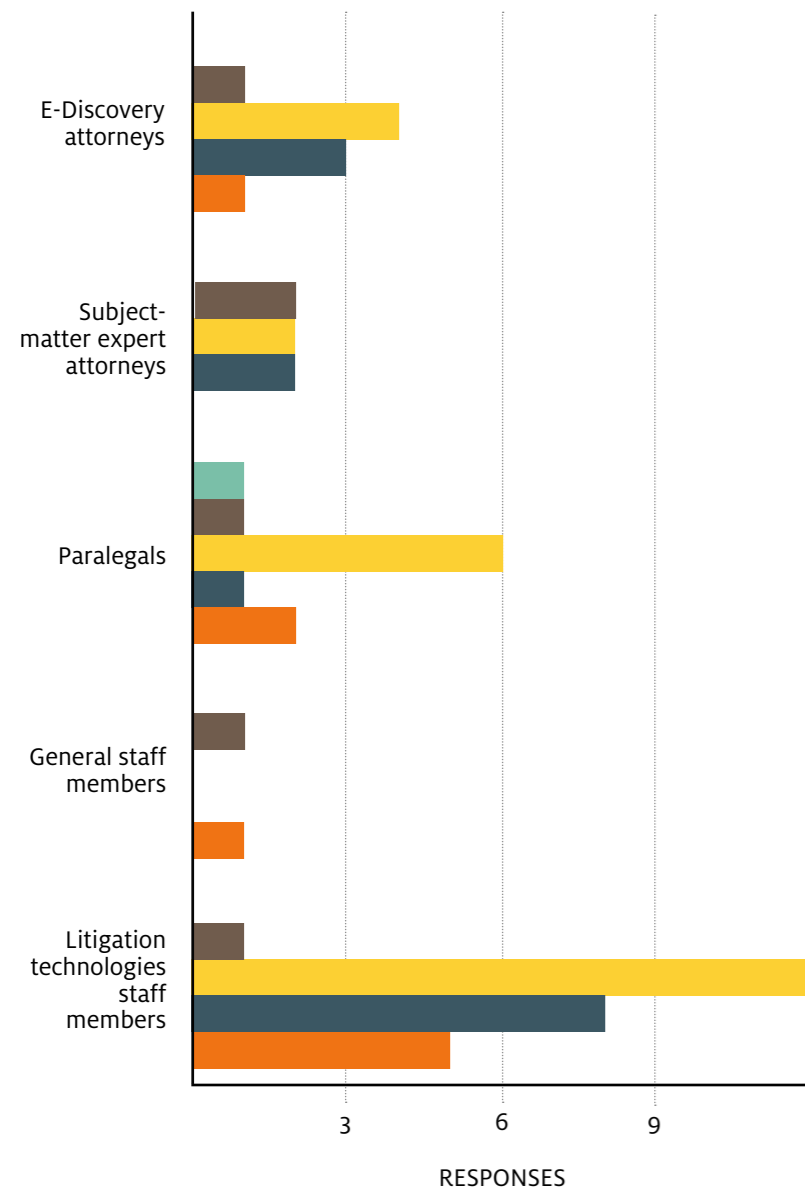
When comparing those same firms and the duration of the program against the stage the program is in, it is interesting to note that firms used the "In Progress" designation for programs of all ages.



### Who fulfills the role of litigation project manager?



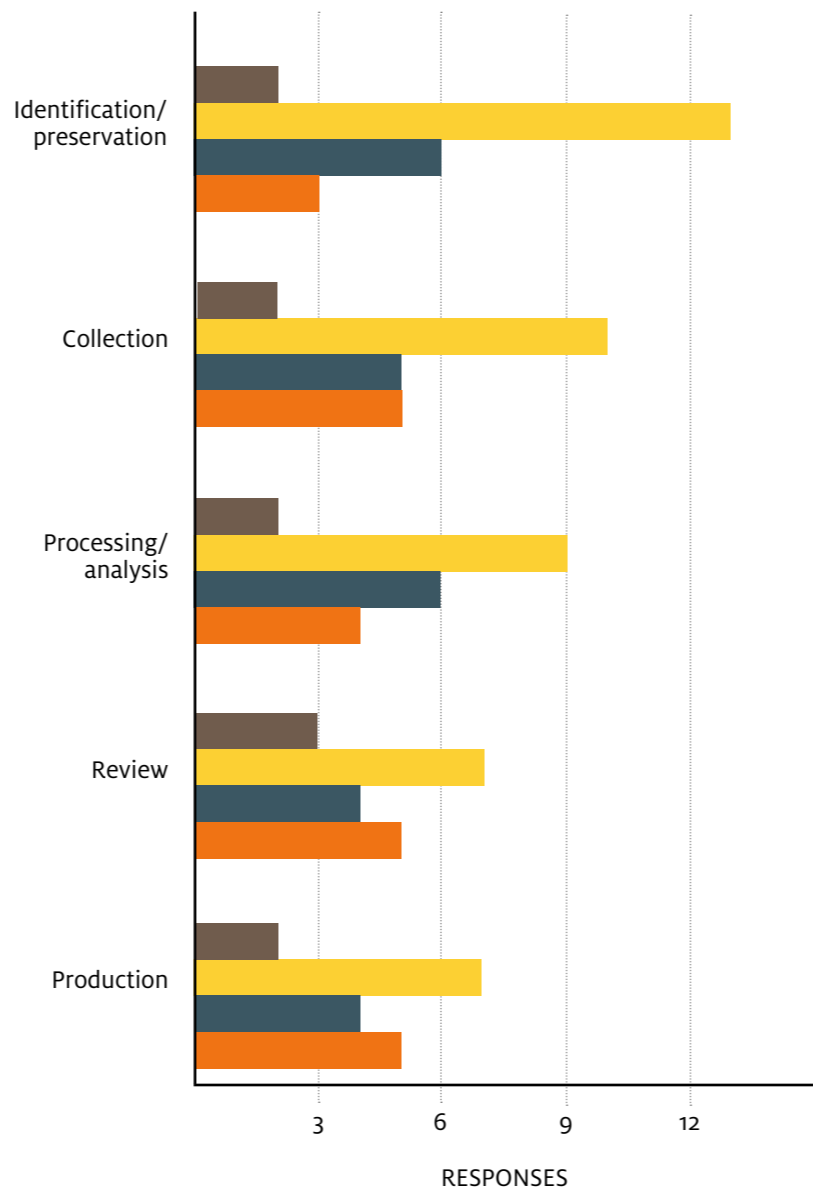
Litigation technologies staff members act as the litigation project manager in 76% of firms responding. Some organizations indicated that other staff members may also fill this roll, with 44% supplementing using attorneys in this role.



### At what stage of the EDRM model do you engage litigation project management? (select all that apply)



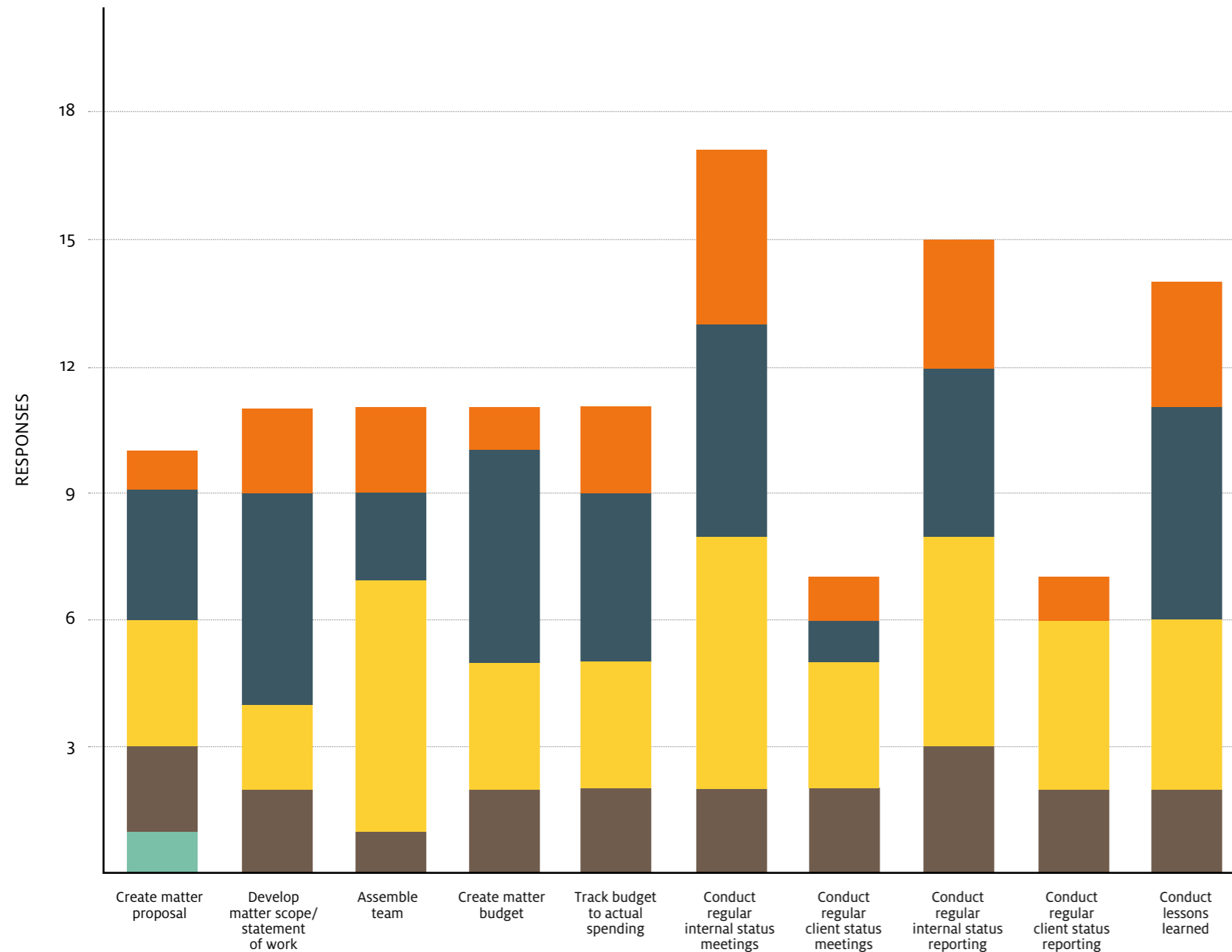
Firms indicate the engagement of litigation project management through the duration of the EDRM model, while the largest firms indicate that PMs are engaged in all stages equally except identification/preservation. Midsize firms leverage PMs in the earlier stages more than later ones.



## What litigation project management activities typically occur on matters where litigation project management is used at your firm? (select all that apply)

50 or fewer attorneys    51-150 attorneys    151-500 attorneys    501-1,000 attorneys    more than 1,000 attorneys

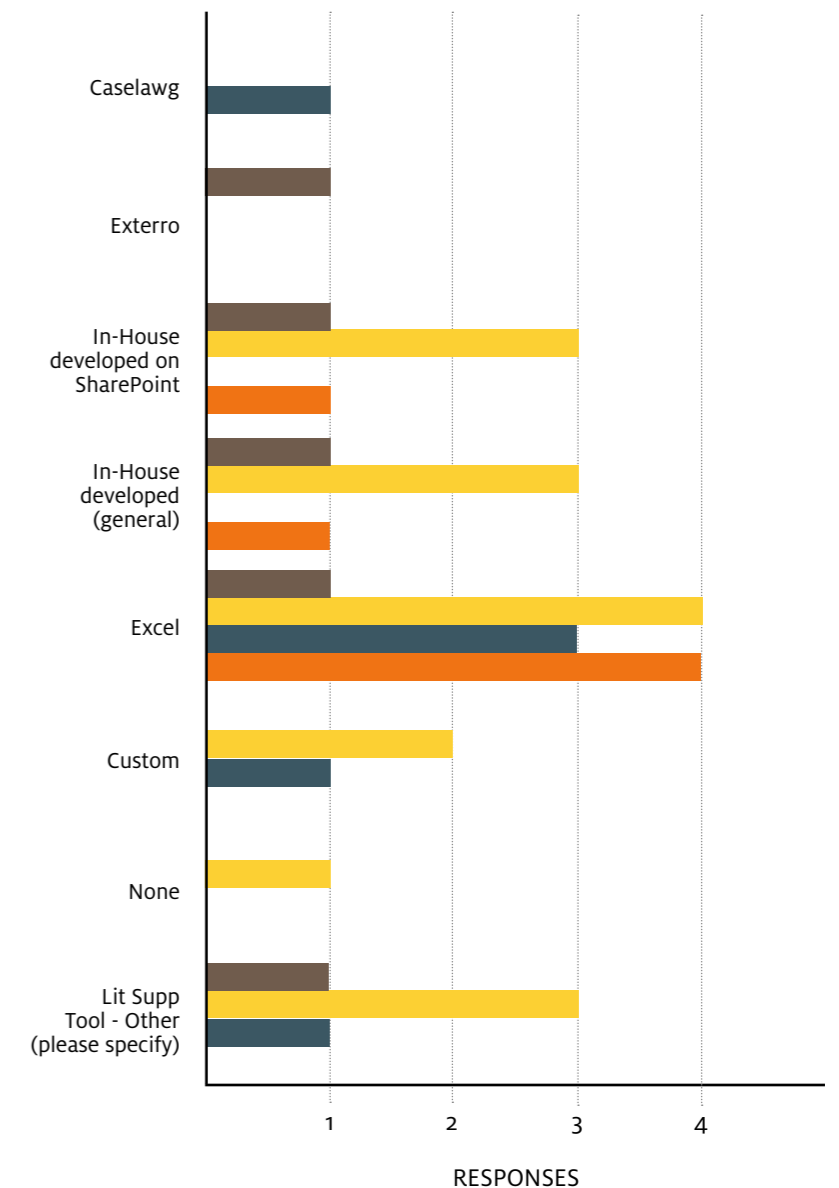
Conducting regular internal status meetings is the most common litigation project management activities, followed with providing internal status reports and conducting lessons learned.



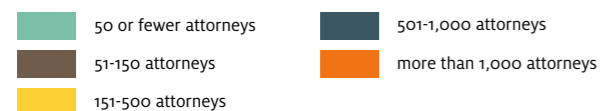
## What litigation project management tools do you use? (select all that apply)

50 or fewer attorneys    51-150 attorneys    151-500 attorneys    501-1,000 attorneys    more than 1,000 attorneys

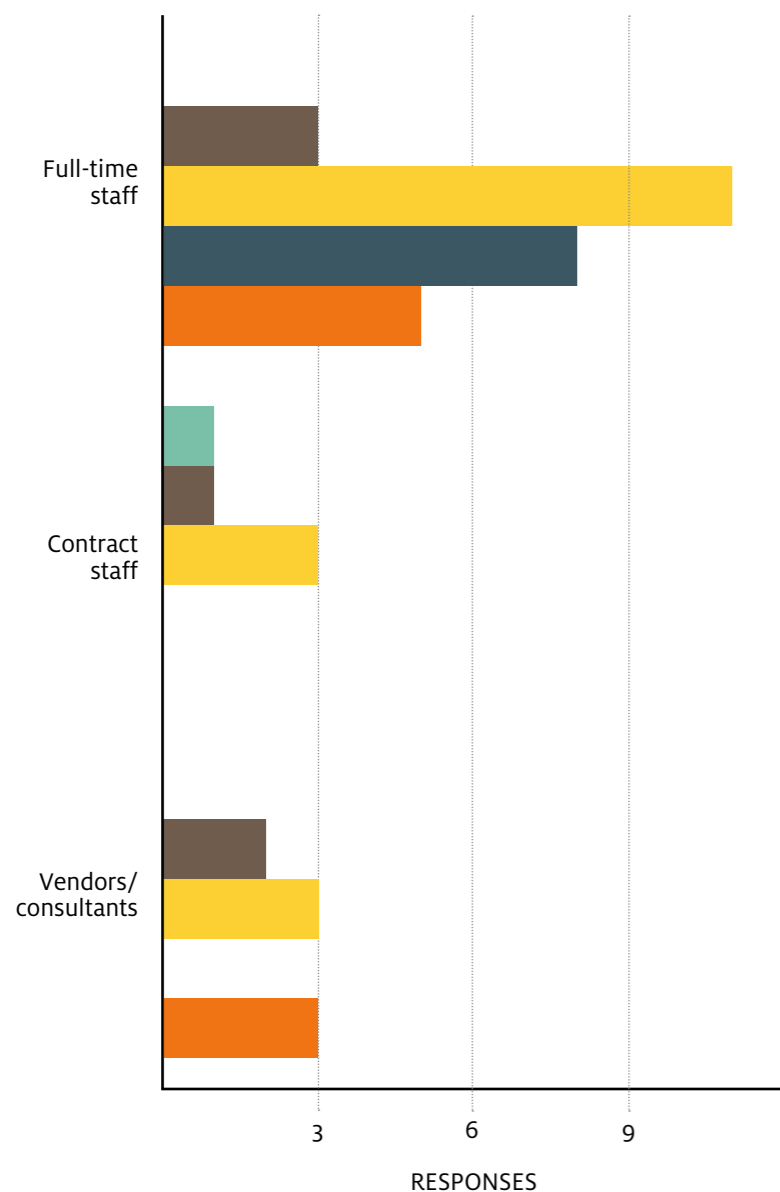
Of all the responses, Excel files were cited as the most common tool for tracking litigation projects. Tools outside our list that were noted included: NightOwl, Guidance, Cael, Daegis, TransCEND, Aspera FTP, LAW/IPRO, CaseMap and eRoom.



### How do you staff your litigation support department?



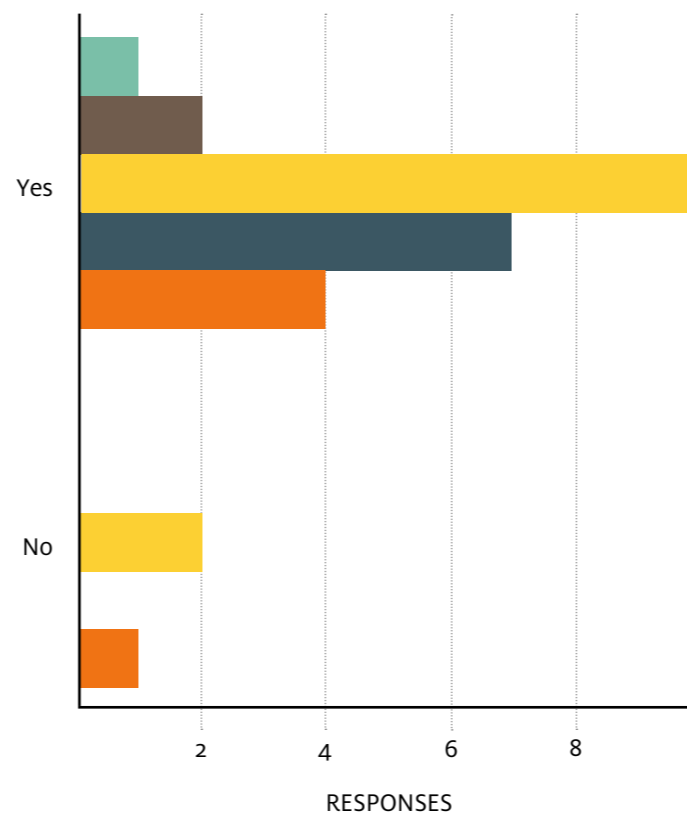
In firms with litigation support departments, full-time staff make up 93% of all staff.



### Are you tracking productions?



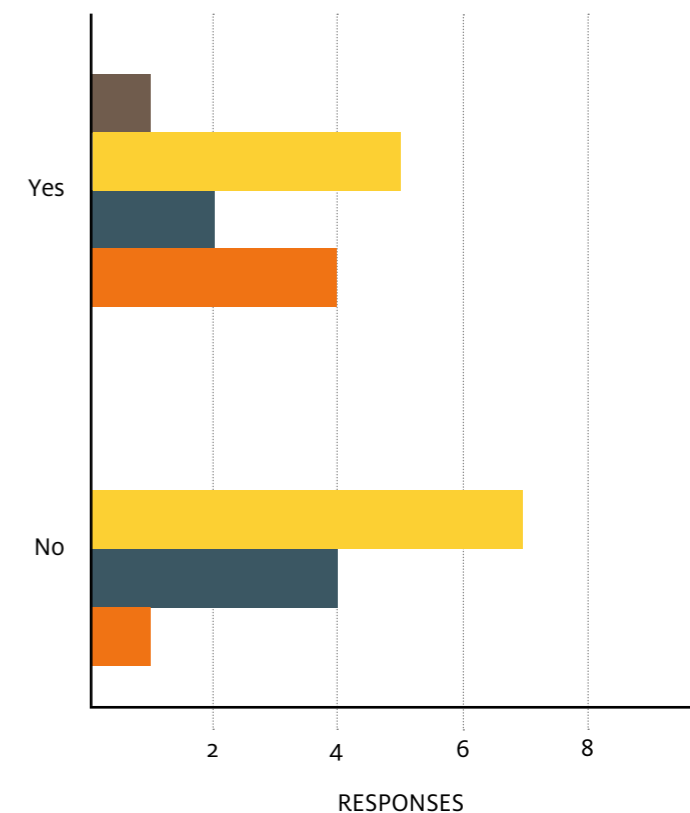
Of the organizations that respond, 89% track productions.



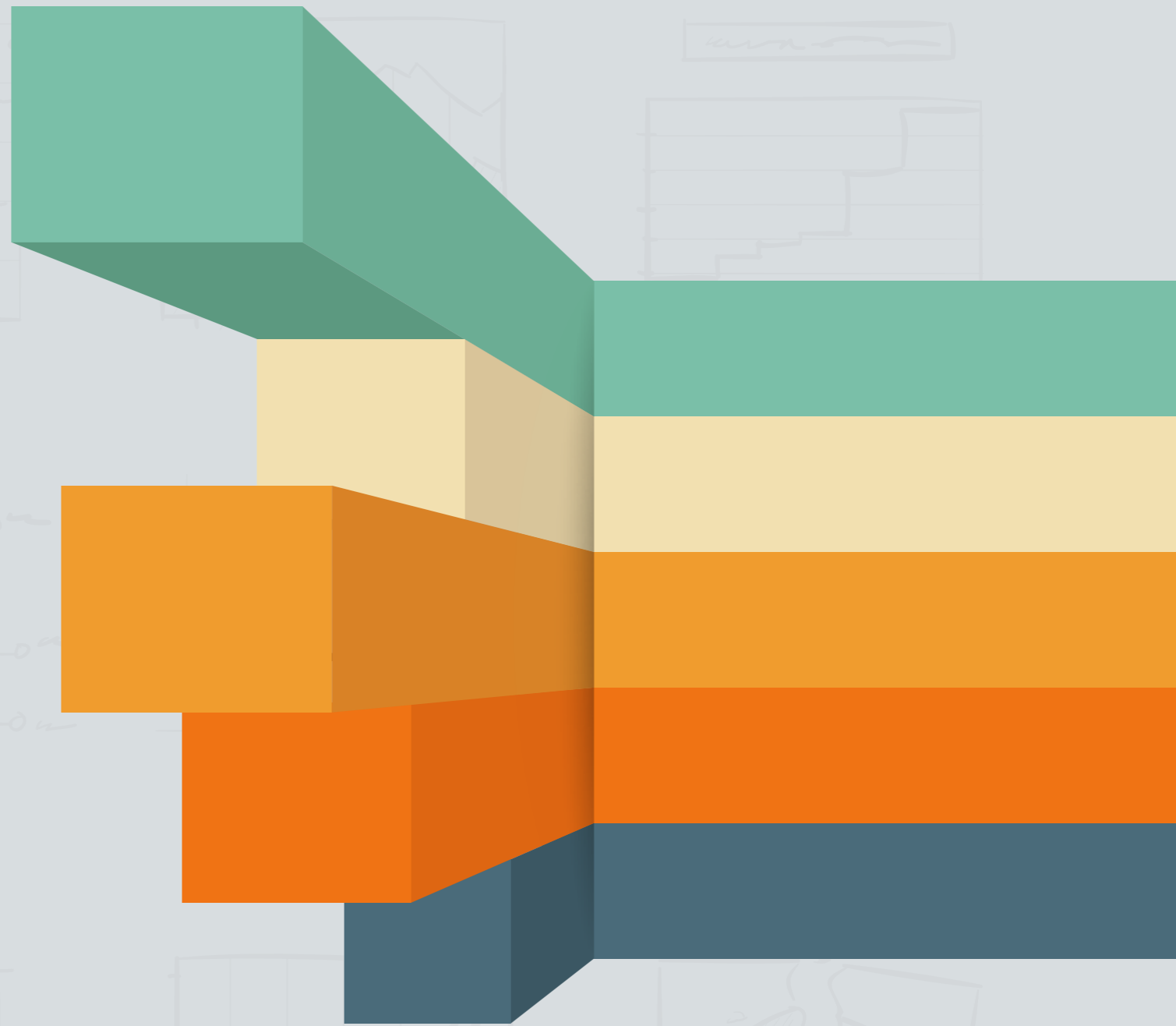
### Do you require chain of custody when producing documents?



The requirement to track chain of custody is split evenly between firms that do require it and those that do not.



# Comments / Advice



## If an organization was considering starting a PMO/team, what is the one piece of advice you would offer?

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### Management Support:

- Have strong buy-in from senior leadership
- Identify a sponsor to champion the effort
- Make sure management understands what a PMO is and what it brings to the table

### Staffing:

- Offer training, and give people time to take it
- Find strong leadership
- Identify weaknesses/needs of the various groups within IT, and hire resources to fill gaps
- Have dedicated project managers instead of someone doing it as part of their other duties
- Have the PMO report directly to the COO/chairman
- Choose a project manager with relationships in all departments
- Hire someone with a business (traditional project management) background and pair them with people who understand the law firm environment
- Position your project manager closely with the finance department for pricing, budgeting and process improvement reasons

### General:

- Strategically determine which projects get PMO resources
- Define expectations
- Put the PMO outside of IT
- Try different approaches until you come with a strategy that works for your organization
- Have a “standard of procedure” in place from the beginning for structure and guidelines
- Spend more time on legal project management to control firm costs better
- Start simple and informal to get quick wins
- Don't purchase project management software until defined processes are in place
- Make sure you provide value to the team
- Start with agreement on what problem the PMO is trying to solve, then focus on people first, process second and tools last
- Begin as soon as possible
- Understand what your organization needs and values, and deliver on those areas
- Ensure the scope of the project is described in a project charter
- Include the concept of program management from the start
- Ensure there is justification for the creation and support of a PMO in your organization



## What project management advice would you offer to your peers?

### Management Support:

- Get buy-in from senior management (attorneys and administrative staff)

### Staffing:

- Have a dedicated project manager instead of someone doing it as part of their other work
- Utilize a project manager outside of the working unit to oversee a project

### Process:

- Be organized and communicate continuously
- Bring in the tools to enable reporting and organization for all projects
- Be clear on the value you are adding to a project, the objectives of the firm and your alignment to the firm's goals
- The process will continue to be refined
- Create a formal process with options that can be removed when necessary
- Make your PMO indispensable by tracking successes
- Partner with the business and functional managers so you become a desired resource
- Make project management a valued part of the organization's culture
- Keep it simple!
- Document everything
- Become involved with your local PMI chapter
- Adapt your skills to your company/area — processes that are too formal might lower adoption rates
- Don't feel you have to explain every piece of what you are doing, most just want to know what affects them and their workload
- Use the pieces of a methodology that work and leave the ones that don't
- Be organized, stay on track and have a solid understanding of your end goal
- Be honest and transparent with stakeholders
- Project managers need to have knowledge of process, change management and technical disciplines to be effective
- Concentrate on clear communication and a shared vision
- Plan/manage resource allocation
- Take great care of your project teams — if they have the information and resources they need, your projects will be successful
- Earn the firm's business every day
- Book twice the amount of time you originally estimated for every project task
- Have a PMO that does not report to IT
- Formal and standardized project management methods should be required for all projects throughout the entire enterprise
- Build confidence and trust by delivering on your promises

### General:

- Embrace project management — it's the way to conduct a well-functioning business
- Start as soon as possible — the price sensitivity of clients will increase faster than the speed in which you will be able to adopt internal processes
- Patience and resiliency!
- To be successful, it has to be viewed as useful by those using it.
- Every attorney and client can benefit from applied formal project management
- Adapt as the business requires, get management buy-in and document appropriately