



# Chaos to Clarity: 3 Proven Project Management Techniques for Lawyers

March 2024



Chaos to Clarity —

# Agenda



- 01 Leveraging project management techniques for legal
- 02 The critical role of the legal intake process
- 03 Understanding the 'why' behind the need for process
- 04 Prioritizing strategic legal initiatives to boost efficiency
- 05 Employing organizational tools and methods to manage deadlines

# Speakers



**Tom Allen**  
Program Manager,  
LinkSquares



**Jonathan Greenblatt**  
VP, Legal  
LinkSquares



**Colleen Matthews**  
Product Marketing Manager,  
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# Tailoring Project Management Methodologies for Legal Operations

- Popular project management frameworks and how they have real-world value:
  - Weighted Shortest Job First
  - Getting Things Done
  - Sequential Project Management
- Applying key project management methodologies to the legal field and fine-tuning for your business needs





# The integral role of the legal intake process

- How to make your legal intake process sticky to your business units
- How legal can handle process friction after investing time and money into the setup
- When it's time to fully shift your process, should you:
  - Slow Roll
  - Rip off the Bandaid

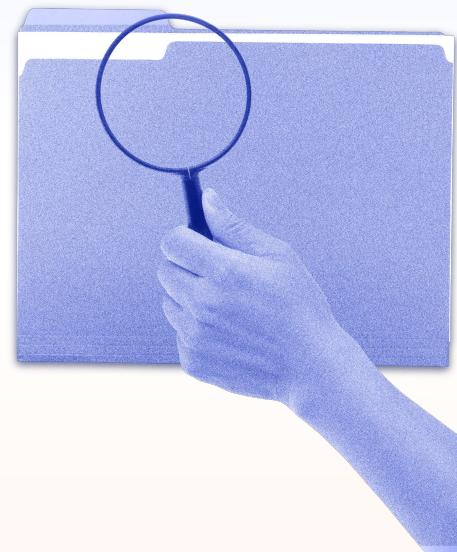




# What's the why?

**Seventy percent** of the 373 U.S. in-house legal professionals who responded to the survey said their **top goal was to be better aligned with business functions.**

Yet according to respondents, **58% of cross-functional partners say legal slows down** projects and **41% say it's too risk-averse.**





# Prioritize strategic legal initiatives

- It can be tempting to tackle administrative tasks as they come in, but you'll see long-term results by allocating more time to strategic projects
- Maximize team efficiency by streamlining admin work so you have more bandwidth to focus on strategic work
- **The real question:** *how* to shift from operational to strategic tasks?





# Mastering deadlines

- Key tools and strategies for efficient deadline management
- How your tech stack can assist managing deadlines
- A few of our team favorites!







# Weighted Shortest Job First - WSJF

*Method #1*

Weight your next work by ranking importance and estimating effort

- What is the “WSJF method?”
- How does this let teams decide what work to triage, prioritize and deliver next?
- How do we define “value” for legal teams?
- How to apply the “WSJF” to your legal team/tasks?



# Sequential

*Method #2*

## A step-by-step approach to project management

- What is the “Sequential” method?
  - Create a task list
  - Identify task dependencies
  - Diagram out the information
- How a step-by-step approach can breakdown complex projects



# Getting Things Done

*Method #3*

## Stress-free productivity

- What is the [“Getting Things Done”](#) method?
  - Capture
  - Clarify
  - Organize
  - Review
  - Engage
- GTD is more of an individual approach, but really captures the necessities of project management.



# Resources

- 01 [eBook: But I'm a Lawyer, Not a Project Manager](#)
- 02 [eBook: How G&A Gets Great: 4 Lessons to Maximize Legal's Partnership with Business Units](#)
- 03 [Book: Getting Things Done by David Allen](#)
- 04 [Article: What is Getting Things Done?](#)
- 05 [Book: Deep Work by Cal Newport](#)



# Upcoming Events

## [Product Spotlight Webinar: What's New in LinkSquares Prioritize](#)

*Tuesday March 12, 2024*

### Join us for:

- Prioritize demo and upcoming vision
- Expert insights from our in-house users
- Interactive Q&A

WEBINAR

LINKSQUARES

## What's New in LinkSquares Prioritize

Product Spotlight Webinar

Tuesday, March 12th  
1:00 PM EST

**SPEAKERS**

**JONATHAN GREENBLATT**  
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**COLLEEN MATTHEWS**  
Product Marketing Manager  
LinkSquares

# Thank you!

Any questions?