



# APM Accredited Legal Project Management Training

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# 1 What do our Clients say about our Training?

Wellingtone has worked with a number of leading law firms including Ince & Co, Stephenson Harwood, DLA Piper, Watson Farley Williams and has delivered extensive training for the University of Law.

Case studies for our work with Ince & Co and the University of Law are available to download from our website.

## 1.1 Feedback from Legal Project Management Training Clients

**"Excellent course.** It provided a lot of food for thought."

**"Really kept my attention.** Great examples given and liked the practice questions all the way through.  
Thanks very much, Wellingtone."

**"Very informative,** will definitely use and benefit from the course. Vince from Wellingtone was excellent".

"I have learned a lot that will help me in my day-to-day job, so I feel **this course was really beneficial to me.**"

"Slides were good and Vince's presentation style made it very accessible & easy to digest. Real life and relatable examples kept it relevant & engaging. **Great to use my real projects for the exercises too.**"

## 1.2 Feedback from other Wellingtone Project Management Training

"Wellingtone developed and delivered a training programme for us that catered for three different types of project management role and was tailored to our organisational needs and our own project management framework. We thoroughly enjoyed working with Wellingtone and found them to be responsive to our needs, willing to share the benefit of their experience, extremely knowledgeable, and very approachable. The training facilitator was extremely popular with delegates because he brought the subject matter to life; the feedback was 100% positive from our staff and I've never before witnessed such a buzz about a training course. In the weeks afterwards, it was evident that the principles and techniques were being applied from the number of post-it note project planning sheets hanging from office walls! We would not hesitate to work with Wellingtone again."  
Manager, **Cheshire Fire & Rescue Service**

"Wellingtone assisted with the creation of our project management methodology and templates. The 121 sessions and the team sessions were very well run and we've ended up with a really good set of templates."  
Head of Change, **Centrica Energy**

"Wellingtone have been very patient with us – especially in tweaking and changing materials so that they use our specific language and guidelines. They're willing to respond to our specific and numerous requirements. The logistics and costings have been transparent and realistic. I would speak very positively of the relationship we've built with them."  
L&D Manager, **Honda**

"We have had great feedback from staff who attended the course Wellingtone designed for us. At every stage through the process of training, from initial contact to follow up I have found them professional, efficient and friendly, a pleasure to work with."

Training Administrator, **Thames Valley Housing**

"The training was fantastic - well researched, thoroughly prepared and tailored to the organisation's needs.

We found it interesting, enjoyable and very relevant, regardless of the level of expertise we each had already. Even experienced project managers were able to take away new ideas and tips for better practice.

Those relatively new to project management found the training stretching but accessible. The trainer was thought provoking and measured yet amusing and engaging, an expert in this field."

Policy & Performance Manager, **Royal Borough of Windsor & Maidenhead**

## 2 Our Legal Project Management Training Expertise

We are recognised leaders in delivering customised, practical project management training for clients across many different industries. Our customised courses enable subject matter experts to benefit from practical tools & techniques grounded in best practice project management.

The UK legal sector grew at the “phenomenal” rate of 8% last year and is worth almost £26bn, according to research commissioned by the Law Society. This headline masks the changing face of legal services and the demand for more efficient ways of working. New market entrants, demands from project management savvy clients and the shift to alternative fee arrangements, in particular fixed fees, all necessitate change in the industry. Those who embrace this change will succeed, whereas firms that fail to equip themselves for the challenge will undoubtedly suffer.

The rapidly growing interest in project management from the legal profession has resulted in Wellington working with a number of industry leaders in the last few years and this has culminated in us being able to offer a customised course specifically designed for lawyers and other legal industry professionals. Our course includes Legal Project Management document templates and a Microsoft Excel LPM Toolkit that all delegates are free to use.

**The Wellington LPM course has been developed with practitioners from a number of leading firms and has been Accredited by the Chartered Body for Project Management, the APM. This is the only LPM course to have received endorsement by the professional body.**

This course can be delivered as a standalone service and this document provides a summary of our standard Legal Project Management course. Many clients take this as an opportunity to not just deliver training, but to establish project management as a core business processes. We are experts in helping organisations increase their project management maturity through a defined project management maturity roadmap. Talk to us today about how we can help your organisation embrace project management.

Key points about our project management training expertise:

- We are the only organisation worldwide to be both an Association for Project Management (APM) Accredited training provider and a Microsoft Gold Partner with the PPM specialisation
- We also provide customised project management courses that incorporate YOUR project management methodology & associated business processes
- Our courses can incorporate professional qualifications in project management as provided by the APM
- We can include Microsoft Project training as part of courses or as separate courses
- Wellington has more courses Accredited by the APM than any other organisation worldwide

### 3 About our APM Accredited LPM Course

This unique APM Accredited LPM course assumes no formal existing knowledge of project management but assumes delegates have been involved or understand legal matters such as a transaction or case.

#### The training objectives are:

- To introduce delegates to Legal Project Management and the benefits of employing this approach. The course introduces delegates to the Wellington LPM framework; including project lifecycle, stage gates, project roles & responsibilities, project governance, managing scope changes, LPM document templates and LPM Toolkit
- To provide delegates with practical skills in project management, including; planning, risk management, resource estimating & assigning, progress, cost & earned value tracking, stakeholder engagement and project communication
- To challenge delegates to think as Project Managers and change their way of working

This course is trainer lead and classroom based. The Legal Project Management course includes many practical exercises and discussions with some of the exercises being team based and others for the individual to complete. Delegates would use their own legal practice experience when completing course exercises to ensure they can see how techniques can be applied immediately to their day-to-day work.

We are able to customise this course to align with your exact training needs. Our courses are typically run in-house and branded for your organisation so they become your courses for your delegates.

## 4 LPM Training Course Agenda

The Wellington Legal Project Management course runs from 9:30am until 5:00pm. Morning, lunch and afternoon breaks are included. It is recommended that a maximum of 10 delegates attend each course and it is often most useful for delegates if these have a range of experience.

No	Topic
	<b>Introductions</b>
1	<p><b>What is Good Project Management</b></p> <p>Introduce the business case for project management in the legal profession. Explain the sources of best practice and how the benefits realised in other industries can be applied in a legal context. Provide a clear definition of a project and project management. Review common reasons why project fail and work is completed at the last minute. Introduce the concept of the Time, Cost, Quality Triangle and the constraints this creates.</p> <p><b>Exercise: TCQ Triangle</b></p>
2	<p><b>The Project Team</b></p> <p>Explain roles within a project, including the role of the Sponsor (in the legal context this is the client) and the role (&amp; responsibilities) of the Project Manager, project team and other stakeholders. Discuss appropriate project governance and importance of clearly communicating the project team structure.</p> <p><b>Exercise: Create Project Team Chart</b></p>
3	<p><b>The Wellington Legal Project Management Framework</b></p> <p>Introduce the Wellington Legal Project Management Framework. Discuss the Legal Project Management Lifecycle and the Wellington Project Management document templates. The Wellington LPM Lifecycle consists of four Phases; Initiate, Plan, Delivery, Close. Each of these Phases are discussed in turn, providing an opportunity to introduce practical techniques applicable to each Phase.</p>
4	<p><b>Lifecycle Phase: Initiate</b></p> <p>Establishing objectives with the client, understanding client expectations, and discuss the importance of aligning quality in the legal context. The technique of active listening will be highlighted. The Wellington LPM Mandate Document is introduced and discussed.</p>
5	<p><b>Lifecycle Phase: Planning</b></p> <p>This is a key topic for the course and breaks down into planning, estimating, team creation and risk management.</p> <p><u>Planning</u></p> <p>We start with an explanation of how to build a high level plan using the post-it note technique. We complete a practical group exercise building an example high level project plan based on this technique prior to then each delegate building a project plan of a project of their choice.</p> <p><b>Exercise: Build High Level Project Plan (individual or team)</b></p> <p>Topic then builds on the initial high level plan to show how to create a schedule based on identifying milestones and project Anchor Points to forward &amp; backward calculate start &amp; finish dates.</p>

	<p><u>Estimating</u></p> <p>We discuss PM best practice estimating techniques and the recommended approach in a legal context around workhours &amp; elapsed time. This topic also introduces the Estimating Confidence Factor to enable the creation of a cost estimate for a client.</p> <p><b>Exercise: Create a Cost Estimate using the Estimating Confidence Factor</b></p> <p><u>Risks</u></p> <p>We then look at how to select an appropriate project team to support the project before then introducing practical best practice risk management with risk prioritisation &amp; appropriate risk planning strategies</p> <p><b>Exercise: Conduct a Risk Assessment for your project</b></p> <p>We conclude this important phase with the creation and documentation of the baseline (schedule, cost &amp; resources) using the Wellington LPM Project Delivery Document template.</p>
6	<p><b>Lifecycle Phase: Delivery Phase</b></p> <p>Once a project is underway the Project Manager must establish a progress cycle to monitor creation of deliverables against the original baseline. This topic explains this approach the techniques applicable for this phase along with guidance on how to deal with scope changes.</p> <p><u>CARS Matrix</u></p> <p>It must be very clear who owns each task in the plan. This is best achieved using a RAM. The classic RAM; the RACI Matrix model will be explained (Responsible, Accountable, Consult &amp; Inform) along with the Wellington recommended approach for the legal professional using the Wellington CARS Matrix.</p> <p><b>Exercise: Complete a CARS Matrix for your project</b></p> <p><u>Earned Value</u></p> <p>This topic will also show how the Project Manager should monitor progress using the Progress Cycle and calculate earned value based on progress and hours burned.</p> <p><b>Exercise: Calculate Earned Value</b></p> <p><u>Scope Change</u></p> <p>The Project Manager must be able to deal with scope changes, they are inevitable. This topic concludes with an explanation of how to manage change and using the Wellington LPM Change Template</p>
13	<p><b>Stakeholder Management &amp; Project Reporting</b></p> <p>The definition of stakeholders is explained and this topic looks at the practical stakeholder mapping technique. Stakeholders can then be prioritised based on influence and interest.</p> <p><b>Exercise: Complete Stakeholder Mapping for your project</b></p> <p>The second part of this topic is to then take the outputs of stakeholder mapping and develop a project communications plan. A key part of project communications is providing a status report during Delivery. This topic therefore also looks at the Wellington LPM Status Report template.</p>
14	<p><b>Lifecycle Phase: Closure</b></p> <p>The final closure stage is discussed with a focus on the benefits of completing lessons learned and capturing statistical data on performance for use on future project estimating. The Wellington LPM Closure Report document template is also reviewed.</p>

15	<b>Successful Legal Project Management</b> This final short topic provides a summary of the course and the introduced practical techniques. The Wellington LPM Toolkit is also explained. Finally delegates are invited to discuss now this new knowledge, techniques and templates can be applied in their day to day work
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## 5 About Us

Established since 1995 we are a specialist PPM consulting firm based in Windsor, Berkshire working with clients across all industries in the UK and internationally.

We offer a wide range of complementary services, including:



### 5.1 Clients include:

