

LPM Self-Assessment Checklist

	Your Level of Concern			
	None	Low	Med	High
Part 1: Set objectives and define scope				
Your clients and/or your team do not fully understand exactly what is and is not included in a particular engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engagement letters fail to specify assumptions in hourly cost estimates or AFAs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your clients are unclear about exactly what they want and need	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clients sometimes question the work that was done and what they are willing to pay for	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client decision makers disagree on the goals of a matter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Part 2: Identify and schedule activities				
You and/or your team overlook tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your process for routine matters could be more efficient or simplified	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You do not use checklists regularly, effectively, or at all	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Last minute time crunches or missed deadlines sometimes occur	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Part 3: Assign tasks and manage the team				
You are overwhelmed with too much work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Team meetings are inefficient or ineffective	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client demands for lower cost often lead to reduced profitability, which might be avoided with more effective delegation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delegated tasks come back late or the work comes back differently than you expected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You lose too much time to e-mails, phone calls, or other interruptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Part 4: Plan and manage the budget				
You often begin matters without having a clear idea of the likely total cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Legal fees frequently exceed your budget estimates at the start of a matter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your realization rate is too low and/or you have too many write-offs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You have a difficult time meeting AFA requirements and capped fees while remaining profitable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Part 5: Assess risks to budget and schedule	None	Low	Med	High
You and/or your team are unaware of the risks to the schedule or budget at the start of a matter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You and/or your team could improve the way you minimize risks to the schedule or budget at the start of a matter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Part 6: Manage quality	None	Low	Med	High
Perfectionism drives up fees with minimal quality improvement and/or little to no significant benefit as perceived by the client	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You and/or your team do not have quality control measures in place to maintain the same level of quality while becoming more efficient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Part 7: Manage client communications and expectations	None	Low	Med	High
You fail to keep your clients regularly informed about progress	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You do not know what type of updates (e.g., phone or email, weekly or monthly) each client prefers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your team lacks a clear understanding of responsibilities and a clear plan for communicating within the team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your team lacks a clear understanding of who should communicate directly with clients, and who should not	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You and/or your team sometimes engage in miscommunication with each other and/or with the client	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You do not routinely hold “lessons learned” reviews with your team and with clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You could improve the way you handle difficult clients and situations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Part 8: Negotiate changes of scope	None	Low	Med	High
You do not effectively negotiate changes in scope with clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You do not spot “red flags” immediately and make needed adjustments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You do not communicate changes in scope to clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You do not have systems in place to track work that is beyond scope	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You do not have a formal process for dealing with changes in scope	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your team does not know when there is a change in scope	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your team does not immediately inform you about changes in scope	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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