

# Dialing for Pizza: Practical Perspectives on Scoping Legal Projects

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Legal Project Management (LPM) assigns extraordinary importance to providing legal services that deliver value *as perceived by the client*. Yet over and over again we observe that while in-house counsel tend to view legal matters in terms of broad business issues and the pressures of “commerciality,” law firm lawyers tend to focus on identifying narrow legal issues upon which they can focus their formidable expertise.

Accordingly, a constant challenge in our LPM training workshops is to design exercises and case studies that give participants hands-on experience with LPM processes without indulging lawyers’ insatiable drive to dive into practicing law on any set of facts they’re provided.

Recently, one of our exercises produced an important “teachable moment” about attitudes, assumptions and instructions.

Taking an innovative approach to combining LPM training with client face time, a global law firm invited top-ranking members of a major client’s legal department to join their LPM workshop. When the time came for a practical exercise to demonstrate the importance of breaking matters into distinct phases and tasks when scoping an engagement, we divided the participants into several teams and told them they had 10 minutes to list on sticky notes all of the component tasks needed to “*order in pizza.*”

At debrief time, one team made up entirely of law firm lawyers produced a single sticky note: “Call Greg.” Convulsed with laughter, they said that this total delegation of all phases and tasks to one performer was justified because “Greg is *the* pizza man. He loves pizza, he’s happy to be the ‘go-to’ pizza guy, he knows what we all like, he knows who makes the best pizza, and he has negotiated special volume rates. It’s easiest to give the whole responsibility to him.”

When asked what would happen if Greg were absent on pizza day or tragically was hit by a truck, the team leader responded, “We would just have to do without pizza. Greg is our pizza silo.”

Team 2, also comprised solely of law firm lawyers, approached their assignment diligently and seriously. They broke the task into four phases – needs assessment, logistics, budgeting and vendor analysis – and then detailed a series of 12 tasks. These included designating a pizza-order team leader, inventorying the pizza-eaters’ preferences, agreeing on the pizza budget, collecting funds, identifying the vendor with the fastest delivery, and finally delegating to one lawyer the responsibility for making the call to order the pizza. Their sticky note stream stopped with that phone call. This team was clearly quite proud of its efforts.

Team 3, a group of in-house lawyers, generated 32 phase and task code sticky notes. These included the same general ordering sequence as Team 2, but also included such additional items as taking beverage orders, agreeing on the brand of beer to buy, rounding up napkins and plastic forks, reserving a conference room, seeing what was on TV during the pizza-eating period, *actually eating the pizza*, and, after the meal, asking group members which pizza flavor they had enjoyed most.

Team 2’s leader howled in indignation when we praised Team 3’s logic, thoroughness, and practicality. “Wait a minute! Your instructions only talked about *ordering* pizza. That’s all we were told to do.”

Team 3’s project leader scoffed at this narrow interpretation. “What’s the point of just *ordering* pizza? Obviously, this project was about *having a meal* – that was the objective. Don’t you think you sort of missed the big picture? Your approach runs up a big pizza bill and doesn’t get anybody fed.”

In subsequent discussion, neither team was willing to concede the point. When it came to scoping the project, Team 2 focused on precision, Team 3 focused on practicality. The exercise had revealed a fundamental difference in what “ordering a pizza” meant to each group, and provided a perfect teachable moment about making sure everyone is truly using the same words to describe the same thing.

The point here is not just that in-house lawyers’ roles require them to focus on the forest, whereas law firm lawyers tend to labor among the trees. The lesson from the pizza exercise is that in the formative objective-setting and scoping stage of any engagement, all stakeholders – law firm and client alike – must work harder to clarify what is expected, and this means that everyone must scrupulously avoid making assumptions about what is intended and what is needed by the client.

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