Legal Lean Sigma and Project Management for IP Law: Driving Efficiency, Value and Competitive Advantages

Presented by
Catherine Alman MacDonagh, JD

OM02
9/15/2016
1:15 PM - 2:45 PM

The handouts and presentations attached are copyright and trademark protected and provided for individual use only.
Legal Lean Sigma® and Project Management for IP Law:
*Driving Efficiency, Value and Competitive Advantages*

Catherine Alman MacDonagh, JD
CEO, Legal Lean Sigma Institute
Catherine@LegalLeanSigma.com
@cathmacdonagh

There are many opportunities
to improve the way work is done and delivered,
as well as managed and priced.

PI and PM allows firms to differentiate themselves
in a crowded marketplace and deliver greater value
to both the firm and the client.
Objectives

- Examine and analyze what law firms and legal departments are doing with PI and PM
- Identify key PI methodologies and the stages of PM.
- Explain how PI and PM work together in IP-specific processes to deliver significant returns on investment.
- Assess how PI tools can identify and communicate best practices in IP work.
- Determine how to promote and maintain a client-centric focus.

How we should work…
DIFFUSION OF INNOVATION MODEL

ESSENTIAL MARKETING MODELS HTTP://BITLY/SMARTMODELS
The Pace Only Gets Faster...

2006*

- Three law firms, 5.1%, had utilized Six Sigma
- Five firms, 8.5%, had not used Six Sigma but plan to in the future
- Fifty one firms, or 86.4%, have not used Six Sigma and have no plans to do so

2014*

- More than 90% of firm leaders have said they believe there is a permanent market shift requiring greater efficiency in the delivery of legal services.
- In the area of efficient legal service delivery, 54% of the large firm group was pursuing change, compared to 34% of the smaller firms
- 43% of firms offer PM training.
- Only 30% of law firms have taken on the really challenging task of re-engineering work processes.

2016

- Law schools offer PI / PM, technology and innovation courses / certifications
- Legal departments and law firms use PI and PM to improve processes together

*These surveys are available from Altman Weil at www.altmanweil.com

What Do Clients Want?

Managing legal budgets and spending

A majority of CEOs reported that their total legal department budget did not change significantly last year, with 78 percent reporting they made little or no change to their total departmental budget over the previous 12 months. The trend toward maintaining the current budget continues into 2015. Thirty-five percent of CEOs forecast little or no change to their total budget in the next 12 months. On average, 3 percent of CEOs reported plans to make significant decreases in their total budget, with the bulk of significant decreases stated to occur in outside spending (7 percent) versus significant decreases in inside spending (2 percent). Nine percent predicted significant increases to their inside budget in 2015, and 7 percent planned significant increases for outside budget.

Top three most commonly cited strategies deployed by CEOs to reduce company’s legal spending on external counsel:

1. Negotiation alternative fee arrangements
2. Increase reliance on in-house legal staff
3. Delegation of sensitive counsel
What Do Clients Want?

“I guess the question I’m asked the most often is: "When you were sitting in that capsule listening to the countdown, how did you feel?"

Well, the answer to that one is easy.

I felt exactly how you would feel if you were getting ready to launch and knew you were sitting on top of two million parts – all built by the lowest bidder on a government contract.”

— John Glenn
Are we ready to get serious?

13. Inside / Outside Relationship – Law Firm Change Efforts
In your opinion, in the current legal market, how serious are law firms about changing their legal service delivery model to provide greater value to clients (as opposed to simply cutting costs)?

Median rating: 3

Intent of Law Firms to Change

<table>
<thead>
<tr>
<th>Year</th>
<th>Average</th>
<th>Median</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>3.7</td>
<td>3</td>
</tr>
<tr>
<td>2011</td>
<td>3.7</td>
<td>3</td>
</tr>
<tr>
<td>2012</td>
<td>3.8</td>
<td>3</td>
</tr>
<tr>
<td>2013</td>
<td>3.6</td>
<td>3</td>
</tr>
<tr>
<td>2014</td>
<td>3.4</td>
<td>3</td>
</tr>
<tr>
<td>2015</td>
<td>3.4</td>
<td>3</td>
</tr>
</tbody>
</table>

Requests For Proposals

© 2016 Legal Lean Sigma Institute LLC. All rights reserved. Legal Lean Sigma is a registered trademark of Legal Lean Sigma Institute LLC.
RFP

- What changes could we implement to make the work for your firm more cost-efficient? (2000 character count)
- How and why should we have confidence that your firm will handle matters efficiently and in a cost-effective manner without sacrificing quality? (2000 character count)

RFP

- Major Criteria. Company A seeks reliable, financially stable Law Firms that can meet stringent cost, quality and service requirements. A team will evaluate each proposal based on various criteria, including, but not limited to:
  * Quality and capabilities of legal representation
  * Use of coding for electronic invoicing
  * Experience
  * Location of offices/personnel
  * Diversity
  * Competitive, stable and predictable alternative fee arrangement pricing
  * Processes generating operational efficiencies
  * Use of Technology

- Will a project manager be assigned to the Company A account?
- Please address how you will accomplish greater efficiencies. For example, do you employ project management techniques such as Six Sigma or Lean?
RFP – Bond Counsel

Please **provide the cost, including expenses, to provide all the services** listed in the Statement of Work for the first year of the contract.

Or, as an alternative, provide the cost to provide all the services listed, plus expenses with a guaranteed, “not to exceed” amount.

Please be as detailed as possible in providing a breakdown of your financial proposal.

---

RFP - Bank

[BANK] is interested in developing more flexible/alternative fee arrangements to **maximize our ability to deliver cost-effective and efficient quality legal services.**

[BANK] expects firms to be **proactive** in suggesting alternative fee agreements which would deliver optimal cost savings.

Appendix A – Summary of Professional Fees

[Bank] expects the bidder to **propose creative pricing solutions** in full consideration of a long-term arrangement involving dedicated resources (e.g., [Bank] would pay a portion of the salary and benefit expenses for the retained resources).
**RFP- Utility**

**SOFT-TIME AND INTRA-OFFICE CONFERENCES**
We would like to diminish the billing of “soft” time as a general matter, including unnecessary intra-office conferences, excessive correspondence and non-essential or basic research. **What steps can your firm take to diminish substantially these costs?**

**STRATEGIC PARTNERSHIP**
Please describe how your firm can “partner” with members of [Utility]’s law department or third parties to contain costs associated with legal services provided in Selected Practice Areas.

--

**RFP- Health Insurer**

Are there any **best practices** you follow/recommend in regard to the reduction of administrative tasks (eDiscovery, Court Reporting, Depositions, etc.)?
The Pressure to Satisfy Clients – AND be Profitable

Key PI Methodologies and the Stages of PM
**The Fire-Fighting Doom Loop**

- **Requirements Increase**
- The firm's processes are not capable of performing to the levels currently required.
- Issues, errors, delays, dissatisfaction, complaints ensue.
- Nobody has time to improve processes or innovate.
- Attorneys and staff are required to spend time investigating, problem-solving, fixing, and pacifying.

---

**Why PI and PM Drives Value and is a Win-Win**

**PI**
- As soon as we start to describe and measure a process, we will begin to see things that could be improved:
  - In the client's eyes
  - In the firm's/department's eyes
  - Both
- When we have a standard process, we can modify it as needed.

**PM**
- It is a waste of valuable experience to start each matter as if we have never done this before.
- Planning helps us think through what we will need to succeed in the client's (and our) eyes.
- Carrying out the work that we planned helps us:
  - Avoid risks of all sorts
  - Maximize the probability that we will deliver the outcomes desired, on time and within budget.
What's a Process?

- A describable, repeatable sequence of activities that generates an outcome
- The way we create and deliver value to the client
- The embodiment of our knowledge as to (ideally) the best way to do something

“If you can’t describe what you are doing as a process,
You don’t know what you are doing.”

- W. Edwards Deming
Lean in a Nutshell

Looks for – and relentlessly roots out – 8 kinds of waste to create simpler, faster processes.

Lean – 8 Kinds of Waste

1. Defects – and all related waste, including inspection, testing and correction
2. Overproduction
3. Waiting
4. Inventory
5. Transportation
6. Motion
7. Extra Processing Steps
8. Excess Capacity
Lean – Translating to Legal

- Defects - missing a filing deadline, incomplete forms, bad drafting, data entry errors
- Overproduction - starting work before clearing conflicts, printing too many hard copies, copying too many people
- Waiting - people late to meetings, documents waiting to be worked on, boot up/warm up time for technology, interruptions, late responses from clients, employees, opposing counsel, etc.
- Inventory/ WIP - unanswered email, voicemail, files waiting to be worked on, marketing items, conflicts awaiting clearance.
- Transportation - sending docs by courier v. email, multiple deliveries to one client, checks v. direct deposit, too many handoffs
- Motion - unnecessary travel, extra keystrokes/clicks to find documents, poor office design/layout
- Extra processing - too much research, triple checking, over staffing a file
- Excess Capacity / Non-Utilized Talent - not using paralegals, partners doing associate level work, outside counsel doing work that is best done by the client

Six Sigma in a Nutshell

Six Sigma helps us determine
what are the key factors that affect outcomes
and the “best way” to do something
to increase our probability of positive outcomes.
### Translation

In e-Discovery, a person reviewing documents for litigation would only make a mistake on 3.4 documents out of every 1 million documents reviewed.

### Six Sigma for Competitive Advantages

- “Six Sigma is what we use to eliminate defects as we measure and analyze our work processes. Typically, undocumented processes will yield 20,000—60,000 defects per million opportunities. Six Sigma is designed to get that down to fewer than 4/million.

- On our most recent document review we performed at Five Sigma, or approximately 200 defects per million. By the way, that’s about 200 times better than the average in the legal industry today.”
Lean
Do the right things

- Simplify processes
  - Eliminate waste / steps
  - Maximize process speed
  - Greatly improve productivity
- Focus on resource efficiency

Six Sigma
Do things right

- Understand relationships between variables
- Understand process capability and align with requirements
- Reduce and control variation

Lean and Six Sigma are complementary and are usually used together.

DMAIC: Framework for a PI Project

Lean Sigma uses a disciplined problem solving approach:

- Define: Define the problem and why it needs to be solved
- Measure: Measure the current performance of the process
- Analyze: Analyze the opportunities to reduce waste or variation
- Improve: Improve the process by identifying, implementing and validating process changes
- Control: Control the process by implementing methods to ensure improvements will be sustainable
In DMAIC We Trust

1. Wrong problem
   - Narrow or wrong focus
   - Problem not worth enough $

2. Poor recommendations
   - Preconceived answer
   - Poor analysis – limited data
   - Analysis only to support preferred solution
   - Team not bought in
   - Others not bought in
   - Not enough resources
   - Inadequate thought / planning
   - Not enough managerial support
   - Skipped pilot – implementation flaw

3. Poor achievement of promised results

4. Unable to sell recommendations

5. Poor implementation

**DMAIC helps minimize or eliminate failures!**

The 5 Key Principles of Lean Sigma

1. Specify Value in The Eyes of The Client
2. Reduce Waste and Variation
3. Make Value Flow At the Pull of The Client
4. Align and Empower Employees
5. Continuously Improve In Pursuit of Perfection
What is Project Management?

The process and activity of planning, organizing, motivating, and controlling resources, procedures, and protocols to achieve specific goals.

PMI: The application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.

Fundamentals of Project Management

1. Define objective
2. Define scope and constraints (budget, timeline)
3. Establish the project plan
4. Execute the plan
5. Continuously monitor performance
6. Review and improve

Engaging Phase
Evaluating & Closing
Planning Phase
Execution Phase
Roles

PI & PM – A Powerful Combination

Process Improvement

- Helps us determine the best way to carry out a certain kind of work to achieve
  - Efficiency
  - Excellent quality of work and service
  - High probability of successful outcomes
  - Predictability

Project Management

- A role and set of skills that ensures that for a particular engagement, we
  - Use our “best process” appropriately
  - Actively manage schedules, staff, and deliverables throughout this matter

Note: PM skills are used for managing PI projects
Current State
PI/PM Tools – A small Sample

- Lean Sigma
- DMAIC
- Voice of the Client
- Project charters
- Legal WorkOut™
- Moments of truth
- Diverse, cross functional teams
- Agile and scrum
- Metrics and KPIs
- Gantt charts
- Process maps

- Kaizen
- Feedback – open loop
- Project deliverables and artifacts
- Fee arrangements
- Collaboration
- Celebrations of success
- Change management
- Compensation / reward systems
- Focus on continuous improvement

---

DMAIC Project Charter Worksheet

<table>
<thead>
<tr>
<th>Project Title:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Leader:</td>
<td>Team Members:</td>
</tr>
<tr>
<td>Problem/Opportunity Statement:</td>
<td></td>
</tr>
<tr>
<td>Business Case:</td>
<td>Goal Statement:</td>
</tr>
<tr>
<td>Project Scope:</td>
<td>Stakeholders:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Preliminary Plan</th>
<th>Target Date</th>
<th>Actual Date</th>
<th>Concerns and Issues:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>DEFINE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MEASURE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANALYZE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IMPROVE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CONTROL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Completion Date:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

© Legal Lean Sigma Institute LLC. All rights reserved. Legal Lean Sigma is a registered trademark. LegalLeanSigma.com
Our processes…

Defining Value: VoC

A process always exists to serve a client. It is vitally important to start by defining value in the client’s eyes and understanding what the client requires.

Client Requirements

- **Product / service** requirements – features of the final product or service delivered to the client
- “**Experience**” requirements – how the client expects to be treated and served during his relationship with you
Moments of Truth

Product / service requirements are often specified fairly well, but the “experience” requirements often are not.

Moment of Truth

Any opportunity to make an impression (good or bad) on a client

CTQ Example: Space Pen

In the 1960’s the U.S. spent thousands of dollars to develop a pen that would write in the zero gravity of space

Meanwhile, the Russians simply brought along pencils!
Process Mapping

- **Uses**
  - Road map
  - Visual aid for discussions about
    - Business objectives
    - Scope
    - Opportunities
    - Challenges.
  - Business/client development and project management
  - To have better conversations about what matters to clients

- **Demonstrate**
  - Deep expertise
  - Points of differentiation
  - Best practices.

Process Mapping Case Study

**PROJECT SUMMARY**

- Major litigation produces massive amounts of documentation, which come from a variety of sources and must be readily available if subpoenaed or requested by the opposing counsel.
- Document management is time-consuming and expensive, not to mention important, for the legal case itself.
- Team demonstrated all costs, then agreed on best digital option for the company’s needs, a price, and schedule for scanning all the documents. Developed an IT protocol for the scanning system consistent with existing IT systems. Remapped the document storage and production processes based on a digital process, reducing them to four major steps in total:

  2. Image documents.
  3. Index electronic documents.
  4. Produce e-copies when needed.

**RESULTS**

- After the remapped process, a pilot demonstrated that the unit costs of processing a page of documentation could be reduced by more than 50%.
- An annual savings of $1,130,000 for a similar-sized litigation.
- Non-value-added steps were reduced by 70%.
- After full implementation, the electronic system was so successful that it is being migrated across all the company’s legal functions, with total estimated savings of approximately $10 million.

### Process for Obtaining a Utility Patent

**Patent Process Overview**

**Step 1. Applicant - Has your invention already been patented?**
- Search the Patent Full-Text and Full-Page Image Databases
  - If already patented, end of process
  - If not already patented, continue to Step 2

**Step 2. Applicant - What type of Application are you filing?**
- Design Patent (ornamental characteristics)
- Plant Patent (new variety of asexually reproduced plant)
- Utility Patent (most common) (useful process, machine, article of manufacture, composition of matter)

**Step 3. Applicant - Determine Filing Strategy**
- File Globally?
- Need International protection?
- File in US.?
  - continue to Step 4
- Applicant - Which type of Utility Patent Application to file?
  - Provisional or Nonprovisional

**Step 5. Applicant - Consider expedited examination**
- Prioritized Examination
  - Accelerated Examination Program
  - First Action Interview

**Step 6. Applicant - Who should file?**
- File yourself (Pro Se)

**Step 7. Applicant - Prepare for electronic filing**
- Determine Application processing fees
- Apply for a Customer Number and Digital Certificate

**Step 8. Applicant - Apply for Patent using Electronic Filing System as a Registered e-Filer (Recommended)**
- About EFS Web

**Step 9. USPTO - USPTO examines application**
- Check Application Status
- Allowed?
  - Yes, go to Step 12
- No, continue to Step 10

**Step 10. Applicant - Applicant files replies for reconsideration, and appeals as necessary**

**Step 11. USPTO - If objections and rejection of the examiner are overcome, USPTO sends Notice of Allowance and Fee(s) due**

**Step 12. Applicant - Applicant pays the issue fee and the publication fee**
- USPTO Grants Patent

**Step 13. Applicant - Maintenance fees due 3 1/2, 7 1/2, and 11 1/2 years after patent grant**

---

**http://www.uspto.gov/patents-getting-started/patent-basics/types-patent-applications/utility-patent/process-obtaining**

---

**http://www.uspto.gov/patents-getting-started/patent-basics/types-patent-applications/utility-patent/process-obtaining**
Non-Refundable filing fee (usually $225-$275 per class of goods and services)

Trademark strength – legally stronger
Trademark

TradeMARK FLOW CHART

TRADE MARK SEARCH
TRADE MARK APPLICATION

EXHAUSTED HEARING
- 2 months to 1 year

APPEAL TO HIGH COURT

ACCEPTED

TRADE MARK CERTIFICATE ISSUED (10 YEARS)

WRITTEN APPEAL
- 2 months to 1 year

DECLINED

GOVERNMENT GAZETTE

STATUTORY PERIOD FOR OPPOSITION BY THIRD PARTY

OPPOSITION

TRADE MARK

EXHAUSTED

SUBSTANTIVE EXAMINATION

FORMALITY EXAMINATION

LEGAL INSTITUTE

© Copyright 2016 LegalLean Sigma Institute LLC.
All rights reserved. No materials may be used or reprinted for any purpose without express permission.
Process Maps with Dimension

- Process maps are annotated to reflect decision points, client preferences, and potential variation in scope, (fixed, variable, volatile).
- We can incorporate optimistic, pessimistic, and realistic scenarios

Process Mapping with Clients

The Aon Law Department works with our preferred law firms on process improvement. In joint workshops with the stakeholders, actual processes involving both of us are mapped and simplified.

It is proving to be a most valuable endeavor.

Lean Six Sigma is the right approach for all law departments and you get the multifaceted initiative that has resulted in reduced legal costs, increased budget predictability, improved legal outcomes, and greater employee satisfaction.

Audrey Rubin, J.D.
Vice President and Chief Operating Officer
Aon Global Law Department
Collaboration is Key

Aon’s Strategic Improvement Project

- Partnership with procurement department for RFP process on trademark and other legal matters
- To gain alignment and buy-in, legal department and law firm staff attend Legal Lean Sigma Institute workshops together.

- Areas of focus: faster completion time, lower cost, and fewer errors.
- Sample results: The total dollar amount of rejected invoices decreased by 41 percent. Once the approach was extended to a different process, the initiative decreased the average subpoena cycle time by 44 percent.
Collaboration Case Study: IP Procurement and Maintenance

- Key Issues
  - Antiquated process required manual handling of documentation
  - Excessive time spent reviewing and approving by senior executives
  - No documented roles or process ownership
  - Cycle time unknown but viewed as "too long"
  - No clear decision-making criteria for selection among IP alternatives
  - Strategic importance and risks of mismanagement of IP rights not articulated

- Project Summary
  - Charter: Design and install a process for improvement procurement and maintenance of IP that results in measurable business results

- BPI Team: Executives, SMEs, VP Marketing, VP Administration, Board member, internal corp counsel, outside legal counsel and consultant legal counsel plus consultant facilitator

- RESULTS
  - Reduced IP process costs by 38%
  - Improved protection and reduced risk to key IP assets
  - Reduced senior executive review of IP documents by 75%
  - Reduced IP management by VP Administration by 89%
  - Established IP metrics for future improvements

Source: www.kepner-tregoe.com

TRW: Six Sigma for IP Law

- Summary: Company involvement in intellectual property was at that time intense. Voice of the customer identified registration and protection of patents and trademarks, as well as reduction in registration costs, as the main problems. Six Sigma team identified root causes that were addressed with solutions resulting in a new process with control measurements on defects and standardization procedures.

- RESULTS As a result of the project, TRW realized a $1.8 million savings in hard costs.

- Author: Das, Rini; Colello, Sandi; Davidson, Harriet

- Journal: Six Sigma Forum Magazine
Bringing More Ideas to Market Faster and for Less As knowledge and innovation become more-critical drivers of business success, the value of intellectual property has never been higher. More than ever, companies now depend on bringing new innovations to market quickly and efficiently. Xerox holds one of the world’s largest portfolios of intellectual property. Yet that number of patents was declining relative to competition. Part of the cause was that Xerox’s filing time for patents had grown above the industry average. To address this competitive disadvantage, an internal Lean Six Sigma team applied the Define, Measure, Analyze, Improve, Control process (DMAIC) and uncovered opportunities to remove non-value-add steps. For instance, the team discovered and eliminated two steps that caused major delays: the decision either to prepare the files internally or send to outside counsel, and

Collaborative Conversations

Today’s lawyers with significant corporate clients must speak the language of their clients.

In the current legal environment, the language that resonates with in-house counsel is project management and process improvement.

Thomas L. Sager
Former DuPont General Counsel
Partner at Ballard Spahr
Shook Hardy & Bacon (Shook) partnered with a client to utilize Lean Six Sigma tools for a patent application process. The project focused on two goals: (1) to reduce the amount of time it takes to process an application from start to finish; and (2) to reduce the time from the date of assignment to the date the application is filed with the patent office. Shook worked with the client and used various tools, including process maps and cause-and-effect diagrams, to prepare a step-by-step analysis of the entire process. Tasks or functions were then identified for modification or elimination. For example, the project team identified multiple document transfer points where they were able to eliminate or modify various formatting steps, achieving significant cost and time savings. This involved working with another of the client’s outside vendors to implement a change that eliminated later steps in the

Partnering with clients and utilizing Lean Six Sigma tools for patent application and prosecution process has produced significant improvements in cost and efficiency without reducing the quality of issued patents. Using various tools, including process maps and cause-and-effect diagrams, we can prepare a step-by-step analysis of how our client discloses inventions in-house and how the disclosures for those inventions get to us for processing. Tasks or functions that are redundant are identified for modification or elimination.

For example, we were able to identify that documents were transferred to several of us within the firm from several individuals within a company in various forms and with inconsistent information. Each of us receiving the information would spend excess time decoding what was
INAPI – Applying LSS to Critical Processes

**PROJECT**
- Patent and Trademark Divisions started to employ LSS in 2011
- Purpose: stabilize processes and eliminate defects or failures in the delivery of a product or service.
- Used data and indicators that quantify using benefits and user satisfaction.

**BENEFITS**
- Creates a culture of quality
- Allows development of methodologies to control process variability.
- Improved processing times in patent and trademark applications
- Eliminated unnecessary procedures.

Source: National Institute of Industrial Property (INAPI), legal successor to the Industrial Property Department of the Ministry of Economy (DPI).

---

INAPI – Control and Management

- The Department of Process and Continuous Improvement has designed different tools for live control of applications being processed within INAPI.
- Panel control is the most effective tool - provides the Patent and Trademark Divisions with different indicators to facilitate:
  - Analysis
  - Resource allocation and management
  - Performance improvement
  - Ability to make timely adjustments

Source: Wipo
INAPI Panel Control

Case Study

INAPI – Continuous Improvement

Case Study

- Department of Continuous Improvement Process and Management developed modules for monitoring and supervision of the various business units
- This allows for adaptation and facilitating management and planning over time
- Example: Expert Management Module, used in the Division of Patents - permits control over the workload of external experts, optimizing the distribution of applications for examination
Continuous Improvement Culture

“Many tasks that involve assembling documents or collaborating with clients can benefit from the groundwork that has been laid with our work on closing books. Indeed, any task that is performed repeatedly can and should be re-examined for potential improvement.

At Levenfeld Pearlstein, we don’t want to rely on the status quo. We invite you to challenge assumptions about the best way to get things done, even when it’s a little scary to do so.”

Before
• Bookkeeping was outsourced
• Cost ranged from $500-$1,000
• Paper intensive

After
• Staff developed new skills and responsibility
• Hugely streamlined process that makes use of software (Adobe Pro and ShareFile) already in place at the firm.
• Instead of a CD-ROM, clients receive a ShareFile link, through which they can access and save the electronic closing book.
• Clients have raved

Embracing Legal Lean Sigma®

© Copyright 2016 LegalLean Sigma Institute LLC. All rights reserved. No materials may be used or reprinted for any purpose without express permission.
Systematic Process Improvement

Progress along the continuum does not happen automatically; leaders must deliberately choose to build organizational capability and accrue permanent benefits.

1. Evaluate
   • Measure process capability and efficiency

2. Prioritize
   • Select processes and then the aspects that need attention

3. Improve
   • Continuous improvement
   Employ PI methodology
   • Bring process to required efficiency and performance levels

4. Repeat

10 Types of Innovation

© Copyright 2016 Legal Lean Sigma Institute LLC. All rights reserved. Legal Lean Sigma is a registered trademark. LegalLeanSigma.com
What's next?

The future if we don't embrace PI

- Operating our processes as we always have
- Performance Gap
- Expectations of Clients, Owners, Regulators, etc.

The future when we do...

- Improving our processes
- Competitive advantage
- Expectations of Clients, Owners, Regulators, etc.
Legal Lean Sigma® and Project Management

Practitioner Development and Certifications
- Certifications - White, Yellow and Green Belts
- Keynotes
- Programs

Consulting
- Structuring for Success / Organizational Development
- Strategic Planning
- Workshops for Legal Departments and Law Firms
- Process Mapping
- Project Support
  - Expert facilitation
  - Coaching
  - Kaizens

YOUR OPINION MATTERS!

Please take a moment now to evaluate this session.

Thank You!
Contact

Catherine Alman MacDonagh, JD
CEO and Founder
Legal Lean Sigma Institute
Catherine@LegalLeanSigma.com
857.272.5695
@cathmacdonagh
LegalLeanSigma.com