

# The Verdict on Project Management for Lawyers

SURVEY INSIGHTS FOR THE MODERN ATTORNEY

November 2023



# Executive Summary

While most industries are digitizing their workplaces at a rapid pace, the legal industry continues to fall short in fulfilling the technology requirements of its employees. Burnout and stress is a fact of life for a significant percentage of attorneys today, and surveys suggest that the shortcomings in the tools of their trade are key contributors.

Digging deeper into this, we conducted a survey to understand the technology habits of lawyers – i.e., the tools they use to do work, sources of their frustrations, and what could improve. And we found that attorneys are struggling to manage their matters with their current technology habits. Over 90% are using email to manage their matters, and unsurprisingly, it is email which is the biggest source of frustration for over 44%.

**Our analysis reveals a compelling truth: In today's fast-paced environment, specialized project management tools are essential. And generic tools simply fall short in meeting current attorney demands.** Today's attorneys are asking for tools to help tame and track the hundreds of moving pieces of their matters, and to make sure things don't slip through the cracks. Recognizing the problem is only a first (albeit significant) step in a positive direction. With effective project management, attorneys can not only realize peak productivity, but also shred a significant chunk of those 70-hr workweeks of which few hours are spent on billable tasks.

In this white paper, we invite the industry to understand how things look at the grassroots level – what attorneys feel is the problem and what they say could help. Following that, we propose some of the key principles that must be employed to devise effective and efficient project management solutions, that won't become another tool in the growing tech stack – but minimize the need to sift through a dozen different applications to find the right documents, gain context, or simply understand what's done and what's on the plate.

## How we used the term “project management.”

Legal is one of the only industries that has taken the time to develop a its own discipline within the field of project management, called legal project management (LPM). In their book, “Legal Project Management in One Hour for Lawyers,” authors Pamela Woldow and Douglas Richardson define legal project management as:

*“a systematic approach for scoping, planning, managing, and controlling legal work within clearly understood—by both law firm and client—time, budget, and performance requirements that also captures lessons learned after a project is complete in order to enhance future performance.”<sup>1</sup>*

LPM (or legal project management) arose within the law firm as a response to unprecedented financial and budget pressures from clients. While it leverages the same principles of a broad project management framework, LPM is meant to ensure the law firm delivers value to the client as efficiently as possible. LPM *is not* motivated to improve the law firm lawyer’s ability or experience of managing and working on the matter. This may be why LPM has not been broadly accepted or adopted by lawyers in the field – it’s solely focused on the organization’s needs (i.e. the law firm’s need to sell legal services to the client) and offers little to make it easier for lawyers to deliver high caliber legal services to clients.

That’s why, for the purposes of our research and this report, we focused instead on what we’re calling “project management for lawyers.”

### **“Project Management for Lawyers”**

In contrast, when referring to project management for lawyers in a broader sense (also known as “matter management”), the emphasis shifts slightly. Here, the application of tools and systems is more centered on the lawyer and the facilitation of coordination, delegation, communication, and awareness in handling client matters. While efficiency and matter pricing are still considerations, the focus is broader. It encompasses not just the economic aspects but also the operational intricacies of managing legal work. This approach may involve leveraging project management principles to improve team collaboration, streamline communication channels with clients, and enhance overall matter management. The goal is to simplify complex legal processes and ensure that lawyers and legal teams can focus more effectively on the substantive aspects of legal work.



# Introduction

No one is asking attorneys what their most pressing tech needs are (hint: it's not generative AI).

According to our recent survey, a staggering 83% of lawyers aren't being surveyed about their technology needs. So, we wondered – if attorneys had a voice in the selection of technology at their respective firms, what would they identify as their most pressing needs?

When we asked more than 500 self-identified attorneys about their biggest fears when it came to their client work, a whopping 82% cited “things slipping” as the thing they most worried about. It came as no surprise, then, to hear these

same attorneys report that “Tracking the moving pieces of my matters” remains one of the biggest annoyances in their workdays. Without proper tools and systems to track, manage, and delegate the many deadlines and activities required to deliver high quality legal services to your client, the risk of any matter activity falling through the cracks is higher than anyone is comfortable with.

Addressing these types of risks and identifying lawyer-centric solutions is the essence of project management for lawyers. While AI seems to be the only thing getting attention, it's clear that attorneys need technology to solve their most basic, everyday problems.

In the next sections, we'll examine how lawyers spent their days in 2023, the key challenges they faced, and dig into how the right technology solutions can help.

# How lawyers spend their day

According to a 2022 Legal Trends Report, lawyers only billed an average of 2.6 hours to client matters each day. And though this means that attorneys are spending more than half their workdays on non-billable activities, this figure shows a 2% increase compared to prior year. With many firms expecting their lawyers to bill 2,000 hours or more each year, it should come as no surprise that 42% are now regularly working on Saturdays and 32% on Sundays.<sup>2</sup>


Stress and burnout are at an all-time high amongst lawyers. The American Bar Association reports that 67% of women and 49% of men are experiencing moderate to severe stress, with the rate soaring to 72% for mid-sized firms.<sup>3</sup>

The way lawyers are spending their working hours may surprise you. In addition to the 20 to 30 matters the average lawyer manages, they're often obligated by the firm to participate in as many as 10 separate non-billable activities, ranging from business development to recruitment to project management.<sup>4</sup>

According to one study, eight in 10 say they're spending time on non-billable tasks like entering data in multiple systems, document updates and version

control, and managing time.<sup>5</sup> Even where technology is available to help improve lawyer efficiency and effectiveness, it's frequently not fit-for-purpose.

For instance, ALM's recent Midlevel Associate Survey identified substandard technologies like slow computers and outdated software as part of the problem. And while almost all law firms have access to broad business collaboration tools like Microsoft Teams, barely 26% of lawyers surveyed use it for anything beyond videoconferencing or chat.<sup>6</sup>

 **33%**  
**percent of day**  
**lawyers bill daily**

## Without specialized tools, lawyers default to email for most tasks.

Our survey from the previous year revealed that lawyers spent 66% of their day managing their inboxes. This year, we probed further into the specific uses of email by lawyers. The survey indicated that 92% utilize email as the knowledge management repository for their matters, 84% for task and project management, and 84% use it to understand the context for their deliverables. Additionally, it is common for partners to prompt associates to extract information from emails.



### Do you use email for any of these tasks?

**91.5%**

Recall information I need to do the job

**84.2%**

Manage tasks

**83.5%**

Gain necessary context for deliverables

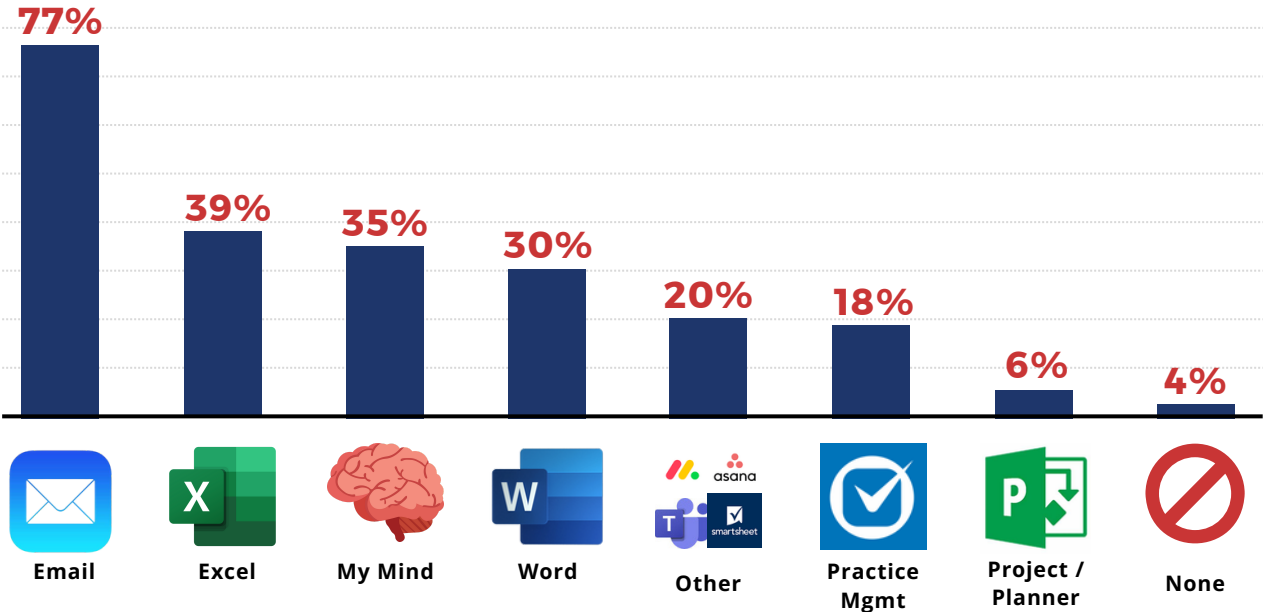
**63.7%**

Partners email me frequently to pull info from emails

Remarkably, despite the influx of new legal tech tools in recent years, **email remains the primary tool most lawyers (77%) used to manage their client work**. Spreadsheet usage follows, with 39% employing Microsoft Excel and 31% leveraging Microsoft Word checklists. Terrifyingly, more than a third of lawyers reported being heavily reliant on their memories using “My Mind” (35%) for managing the moving parts of matters. Less than 5% make use of generic project management tools like Smartsheet (4%) and Microsoft Project or Planner (6%).

The current state of the legal profession highlights a challenging landscape marked by high stress, inefficient work practices, and underutilization of available technology. Despite a slight increase in billable hours, lawyers are overwhelmingly engaged in non-billable activities. The high levels of stress and burnout among lawyers is concerning. While a myriad of tasks, from matter management to non-billable firm obligations, consume their time, the reliance on outdated technologies and traditional methods like email for task management exacerbates inefficiencies. This situation underscores the need for more specialized, efficient tools and practices within the legal industry to alleviate the burden on lawyers and enhance productivity.

▶ **What tools do you use for project / matter management?**



▶ **KEY FINDINGS**

- Lawyers may be spending only a third of their 8-hour day on billable tasks.
- Email remains the most-used tool for matter management, followed by spreadsheets.
- More than 4 out of 5 lawyers use email to recall information, gain context, and manage tasks.

# What lawyers say they need

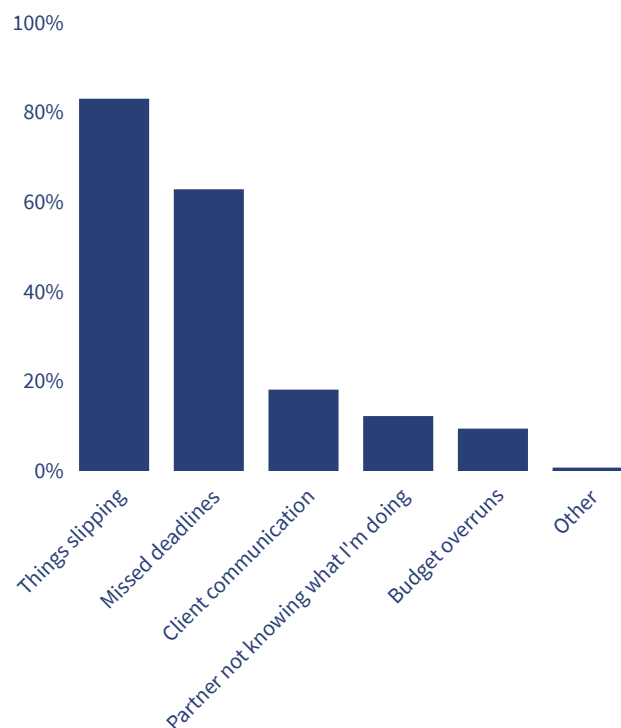
Lawyers are looking for tools to help them minimize risk while delivering high quality client service. An astonishing 83% of legal professionals express anxiety over crucial details slipping through the cracks in their matters and 62% fear missing critical deadlines. And most lawyers (91%) recognize that great technology is critical to client satisfaction. In light of these statistics, it is evident that fit-for-purpose technologies are more indispensable than ever in today's legal landscape. <sup>5</sup>

The dependence on outdated and generalized tools for project management leads to inefficiencies and added stress for lawyers. The scattering of documents through various platforms such as email threads, shared folders, chat applications, document management systems (DMS), texts, local storage, and office software causes considerable delays, as searching for the correct file can become a repetitive and time-consuming ordeal.

The requirement to navigate different application interfaces adds to the complexity, often leading to stress about tracking the latest information, fears of missing important deadlines, or concerns about inadvertently sending confidential information to unintended recipients. These issues have become all too common in the legal industry, with

potential implications for mental health due to constant app switching.<sup>8</sup>

## ▶ When it comes to managing matters, what's your biggest fear?





# Lawyers face significant challenges in their daily work due to reliance on email.

Lawyers frequently work in isolation without a centralized system for real-time information sharing, leading to inefficient communication of progress on tasks, impending deadlines, and client budgeting within the team.

Since email is utilized for collaboration, client communication, task organization, and progress tracking, it's hardly surprising that the main frustrations during a lawyer's workday are the very functions email is tasked with: monitoring ongoing matters (43%), handling tasks (39%), scheduling (36%), revising and updating checklists (32%), and seeking updates from colleagues (29%).

## ▶ What is the biggest annoyance in your workday?



One of the other major drawbacks to relying on email for coordinating client confidential materials? Security. Email is such a common vector of cyber-attacks that three-out-of-four security leaders are bracing for serious consequences to arise from an email attack.<sup>9</sup> Add to the risk the run-of-the-mill risk created by an inadvertent Reply All or erroneous attachment, and the perils of email as a project management solution become quickly self-evident. The challenges

faced by lawyers in their day-to-day underscores the urgent need for more sophisticated and tailored solutions that not only address the inefficiencies and risks inherent in current practices but also align with the high standards and complexities of the legal profession.

## ▶ KEY FINDINGS

- Lawyers say that jumping across too many applications is a major stress factor.
- With regards to matter management, over 4 out of 5 lawyers are afraid of things slipping.
- 3 out of 5 are scared of missing deadlines, and 12% feel anxious due to lack of transparency.
- 44% find email the biggest source of annoyance in their workday.



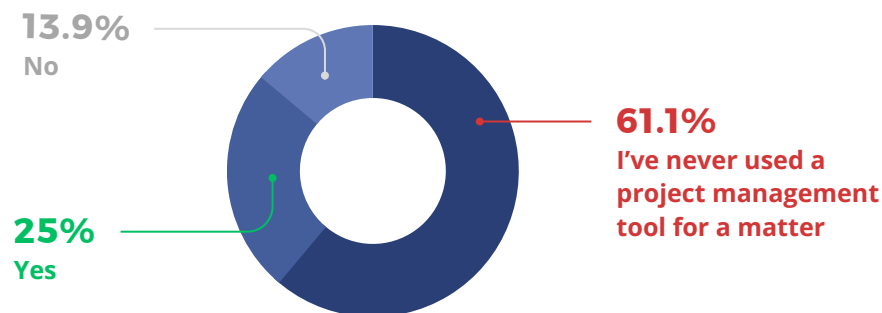
# Project management for lawyers

Despite the term "project management" not being explicitly mentioned in discussions about technology investment among lawyers, its fundamental components are a recurring theme. Key motivators for tech investment by law firms regularly includes the need for remote access to client files (45%), automation of manual tasks (42%), maintaining consistent quality of work (41%), and leveraging technology to reduce nonbillable work (41%).

According to ILTA's 2023 Technology Survey, about a quarter of firms with over 50 lawyers offer their professionals a number of project management solutions, including Microsoft Planner (25%), Microsoft Project (31%), and Smartsheet (24%). But most lawyers (61%) who responded to our survey reported never having used any project management tools on a matter. Of those that had, nearly two-thirds report these tools simplified the management

of their casework. Does this mean that lawyers aren't interested in using these tools? A more likely conclusion might be that these tools fail to meet the needs of lawyers who aren't trained in formal project management frameworks. While each of these more general project management platforms can be customized to legal work, it's unlikely lawyers have the knowledge or time necessary to configure them to meet the specific needs of their client matters.

## ► If you've ever used a project management tool on a matter, did it make the matter easier to manage?



## Key benefits of enhanced project management



Improved task tracking and prioritization



Decreased dependence on email



Swift information retrieval



Diminished project risk



Reduced administrative burden



Increased billable work

## Lawyers have a pressing need for specialized tools.

Legal work necessitates tools that foster team collaboration, offer secure multi-party sharing, ensure task transparency, and cater to the unique demands of a document-heavy industry.

Many law firms struggle to persuade their lawyers to fully adopt tools such as SmartSheet, Microsoft Project, and Asana, often due to their complexity, difficulty in setup, and the necessity for universal adoption to be truly effective.

To tailor solutions to the legal profession, we must consider:



### Purpose-Driven Design

Solutions should grant lawyers and their colleagues clear, dashboard-based overviews of matters, serving as a centralized source of truth.



### Individual-Centric Development

Beyond institutional goals, tools must provide immediate personal benefit, paving the way for broader team adoption.



### **Strategic integrations**

Effective solutions should dovetail with existing apps, and reduce the need for constant switching to access documents and context.



### **Real-Time Transparency**

With task status updates readily available, leadership can avoid constant follow-ups, streamlining the workflow.



### **Simplified Task Management**

Tools should leverage templates to allow for easy checklist creation and updates, minimizing redundant efforts.



### **Ease of Adoption**

User-friendly solutions that are easy to navigate from the start can help reduce turnover related to technology frustrations.



### **Integrated Collaboration**

Features enabling direct communication and task delegation can reduce the reliance on external communication tools.



### **Multi-Domain Management**

Solutions should cater to diverse legal matters, reducing the risk of missed deadlines and oversight of vital details.

By acknowledging what lawyers need and where they've found success with project management tools, we can forge a path to a more efficient and less stressful work environment in the legal sector.

Law firms have ample reasons to improve matter management – it can help them achieve higher productivity, mitigate stress and annoyance across their lawyer and professional staff populations, and deliver better results to their clients. Solutions like Dashboard Legal, which not only check the above boxes but can also be rolled out within days, are the need of the hour for law firms today.

## ▶ KEY FINDINGS

- Matter management solutions helped 39% adopters to improve productivity, and 45% say that it helped them automate mundane tasks.
- Nearly 2 out of 3 lawyers say that project management tools can make their matters easier to manage.
- Instead of generic project management solutions, law firms should look for user-friendly and collaborative solutions that are purpose-built for matter management.





## Summing it up

While artificial intelligence garners much attention as the technological buzzword of the hour, it's project management technology that stands as the most critical technological need for lawyers. These tools directly address the core operational challenges lawyers face: managing timelines, organizing matter documents, and ensuring seamless team collaboration. The gains from investments in such technology are significant: reduced stress among attorneys, diminished risk in handling matters, and improved delivery of client services.

In this light, the sense of anxiety experienced by lawyers surrounding matter management is not unjustified. And while project management solutions can make it easier to manage matters, most are not purpose-built for the legal industry. That's why, they end up becoming yet another addition to the already growing tech stack. Ideal matter management solutions like Dashboard Legal mitigate this issue by offering all the capabilities, processes, and data required for matter management natively.

### ► **CONNECT WITH AN EXPERT**

Dashboard Legal was built to not only simplify project management for lawyers, but to enable a seamless adoption with repeatable success. It can be implemented in minutes, configured within days, and hosted in a private or managed public cloud. Supercharge productivity at your law firm by simplifying matter management with Dashboard Legal.

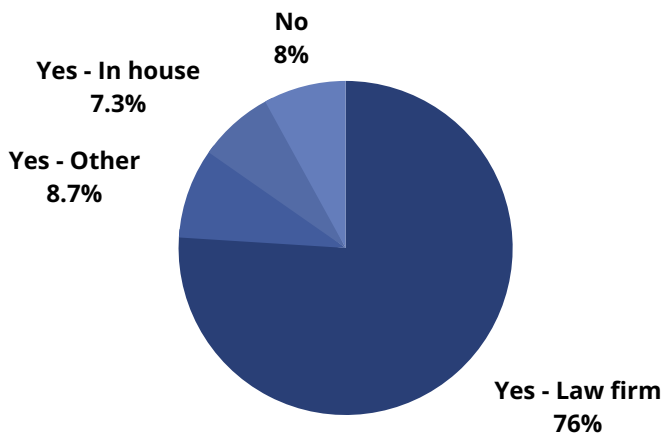
**[Want to learn more about Dashboard Legal?](#)**

# Methodology and Participant Demographics

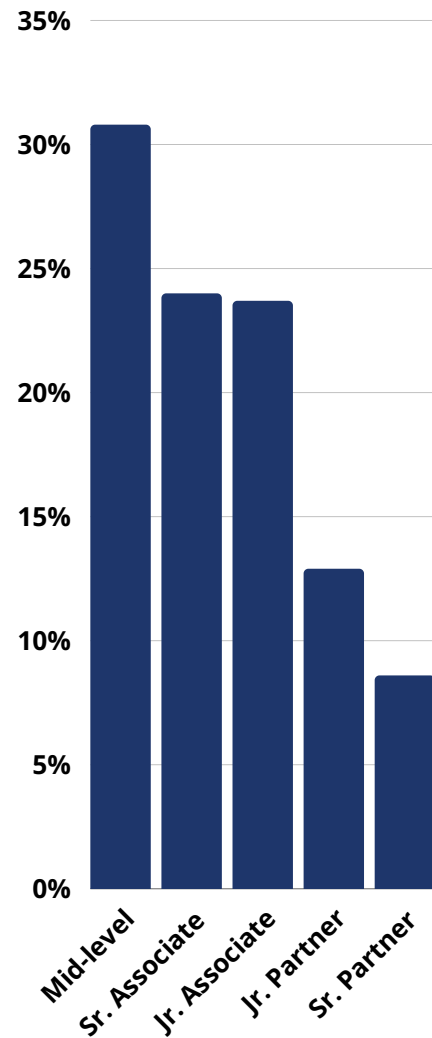
The findings in this report are derived from a survey of self-identified lawyers conducted by Dashboard Legal in October and November 2023.

Legal professionals were invited to participate in an online survey. A total of 555 legal professionals from law firms, in-house legal departments, and other areas of legal practice responded.

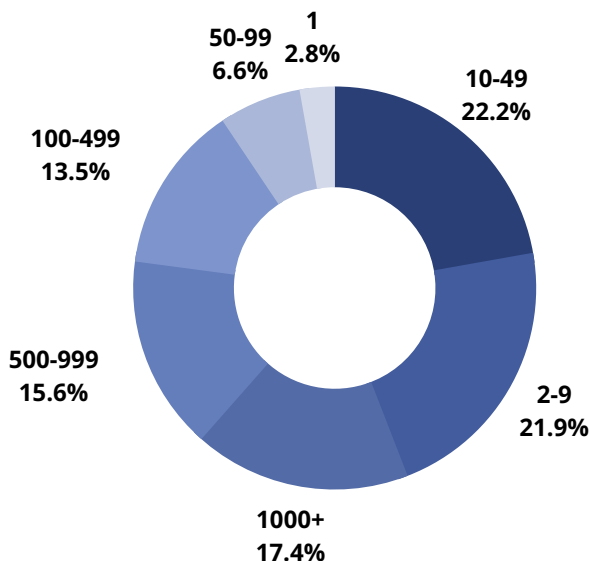
## Are you a lawyer?



## Seniority level



## How many lawyers in your organization?



n = 555



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## **DESIGNED FOR THE LEGAL PROFESSION'S HIGHEST PERFORMERS**

We built Dashboard Legal to make you brilliant at what you do.

Dashboard Legal is Simple. Fast. Intuitive. And comes with advanced features that help you practice at your best.

Matter boards to see everything in one place. Checklists that update in real-time. Chat channels and collaborative notes. Integrations with Outlook and your DMS to bring your most important information into one place. To name but a few.

With Dashboard Legal you'll be more precise. More in control. And enjoy a more dynamic and organized way to work – beyond the Inbox.

