



Winner, 2018 Process Excellence Award
Best Business Transformation Project
for the **Legal WorkOut[®]**

OPEX Week: Business Transformation World Summit

Top 3 Management Consulting / Strategic Planning
2019 National Law Journal's "Best Of" awards

Top 3 Lawyer/Law Firm
Business Development Training & Coaching
Legal Times "Best Of" 2018, 2017, and 2016

WE ARE LEGAL P+ ECOSYSTEM™ EXPERTS



SERVICES

- Strategic Planning, Alignment, and Deployment for Legal Departments and Law Offices
- Process Schema
- Process Improvement & Project Management Certifications, Courses, & Workshops
- Organizational Development
- Legal Operations Assessments
- PI/PM Program Architecture, Design, and Implementation
- Continuous Improvement
- Change Management
- Competitive Advantages
- Design Thinking, Innovation, Collaboration, & Teamwork
- Marketing & Business Development
- Service Excellence

Strategy, Organizational Development, Change Management, and Individual Planning

Facilitation, development, refinement, alignment, and execution of plans for Boards of Directors, Executive/Management Committees, General Counsels, Legal Operations, Law Firm Practice Groups, Departments, and all Teams.

- P+Ecosystem™ Assessment
- Resources and Needs Assessment
- Operations and Baseline Assessments
- Values workshops for service standards and branding
- SWOT Analyses
- Stakeholder analysis
- Stakeholder interviews
- Client interviews
- Strategic goal setting and prioritization
- Talent acquisition and retention
- Structuring for success
- Communication
- Process Schema / Project Mapping
- Individual business planning

Legal Lean Sigma® and Project Management

Consulting, Project Support, Certification Courses, Keynotes, Programs, and Workshops

- Organizational development and structuring/restructuring continuous improvement and project management programs
 - Steering Committee
 - Champions
 - Project Teams
 - Method for selecting and prioritizing projects
- Process Improvement Project Support, Project Design and Scoping
 - Expert facilitation through DMAIC phases and gate reviews
 - Coaching
 - Kaizens
- Certifications
 - White Belt
 - Yellow Belt
 - Green Belt
 - Black Belt
- Programs and Workshops
 - Legal WorkOut™
 - Legal Lean Sigma® Design Thinking
 - Strategic Planning and Implementation
 - Retreats, Workshops, Collaboration, and other curriculum design and delivery
 - Process Mapping and Workflow
 - Steering Committee and Sponsor training
 - Team Leader and Process Improvement Project Team training



Legal Lean Sigma® Certifications in Process Improvement and Project Management

The White and Yellow Belt certification courses include lectures, exercises, simulations, videos, discussions, group work, and demonstrations covering key Process Improvement and project management methodologies, tools, and concepts, using examples and case studies from law firms and legal departments.

The Legal Lean Sigma Institute prepares with you to tailor your course, by helping you select processes (and possible future projects) that are of greatest interest to the participants in our course work. In other words, we teach the material and application of the most widely-used tools in a context that make sense not just in the legal profession but specifically to you and clients. At the end of the course, a certification will be granted immediately to successful participants.

We also incorporate examples and case studies from law firms and legal departments. The course is constructed so that each table-team engages in exercises that facilitate the ability to learn and apply concepts and tools in the context of on a specific legal or business process. With a privately delivered program, we work with you in advance on selection of attendees and the processes used in the workshop components of the course.

No preparation is required, but, as we discussed, we would be happy to help with the selection of processes, organization of the tables, and even prep meetings with the table teams, including the clients. In short, we prepare so that the course content and messaging are delivered in ways that are most immediately useful and relevant to your group. Also, we are pleased to support applications for CLE. A course/reference book will be delivered to you electronically in pdf format for printing, copying and binding for each participant.

White Belt Certification - Course – 1 day. Please check our website for upcoming public courses. Most courses privately delivered. Fees for preparation, tailoring, course delivery, transmission of materials, and certifications are \$18,500 per course for instructors plus travel and expenses. This fee is for up to 6 tables of no more than 7. Additional attendees are welcome with the addition of a facilitator starting at \$5000 plus travel for every 4 tables added.

Yellow Belt Certification - Course - 2 or 2 ½ days. Please check our website for upcoming public courses. Most courses privately delivered. Fees start at \$38,500 plus expenses instructors plus travel and expenses for up to 6 tables of no more than 7. Additional attendees/table teams are welcome with the addition of a facilitator starting at \$5000 per diem plus travel for every 4 tables added.

Green Belt Certification – Requires the successful completion of a project. A Yellow Belt certification is a prerequisite.

Black Belt Certification – Each Black Belt candidate's requirements and plan for completion are developed based on existing skills, education, and experience. On average, successful completion of more than 8 projects with varying focus and use of the range of tools are required.



Legal WorkOut™,

Invented by the Legal Lean Sigma Institute, the award-winning Legal WorkOut® is a tested and accelerated approach to improving legal and business processes. We combined select process improvement and project management methodologies and tools and designed a novel, effective method for legal and business professionals to collaborate and deliver rapid, impressive results.

Our structure takes a cross-functional, cross-organizational, diverse team of people through preparations, a one-day workshop comprised of iterative exercises, and follow up activities and a workshop so that we achieve rapid improvements in a specific legal or business process, build in accountability and follow up, and create a foundation for continuous improvement.

In short, this creates a platform for teams – which can be comprised of participants from both a client organization and the firm – to work on improving a process in a way that benefits both organizations. The framework allows the team to convert ideas into results in 30 - 90 days and then plan for mid-range and longer-term improvement work.

Because we build in a follow up workshop where the team(s) report on their progress and plan for next steps, this approach ensures progress and accountability.

The Legal WorkOut unleashes the know-how and creativity of those who are the real “experts in the process.” They are typically eager to contribute their knowledge and work with a high-performing, high functioning team to improve relationships, communication, and the process.

Outcomes of a Legal WorkOut include:

- Reduced legal costs
- Increased budget predictability
- Improved legal outcomes
- Break down of silos and barriers between groups and organizations
- Unparalleled client experience and alignment
- Greater employee satisfaction

The fee for each initial workshop is USD \$19,500 and \$12,500 for each Workshop 2, plus an allocation of travel expenses. Project management and coaching may also be added to support teams from preparation through execution.

The Legal Lean Sigma Institute LLC partners with expert resources* to provide a full range of consulting and support services.

Planning and Assessments

- Strategy, Practice Group, Executive and Individual Plans
- Practice Development

Coaching

- Business Development
- Leadership
- Practice Development

Innovation, Competitive Advantages, Collaboration, and Teamwork

- Myers-Briggs Type Index - used to develop individual/team understanding and abilities in such areas as communication, team building, leadership, and business/client development
- Custom curriculum design
- Tailored programs, retreats, and workshops
- Client Research/Interviews

Marketing and Business Development – Training and Workshops

- Introduction to marketing and business development
- The client lifecycle
- Service as a differentiator
- Buyer personality types
- Communication styles
- Creating Your Plan
- Effective Introductions: Your Elevator Speech
- Communicating Your Plan and Moving from Planning to Action
- Networking Skills / The Mocktail
- Successful Meetings
- High Performing Client Teams

P+ Ecosystem and Competitive Advantages

- Compensation Assessment and Redesign
- Client Team Formation and Management
- Governance Assessment
- Practice Group Leader Training & Development
- Succession Planning

**Consulting collaborative includes but is not limited to: Corcoran Consulting Group, FIRM Guidance / MacDonagh Consulting, Lex360, EM Consulting, Cross Country Advisors, the Tilt Institute, and Leadership for Lawyers.*