

Project Management

11th October 2023



DGLLEGAL
Services for Lawyers

Presenters

Sarah Charlton | Consultant | DG Legal

Sarah has a BSc (Hons) in Applied Accounting and is a Fellow member of the Association of Chartered and Certified Accountants. Her career spans over 35 years working within the legal sector, fulfilling roles from COFA through to CEO. During her career she has worked with a number of legal regulators, professional bodies and government organisations. Sarah has been a member of the Institute of Legal Finance & Management throughout her career, qualifying as a Fellow member in 2005. Sarah also served as chairperson between 2010-2012 and continues to serve as an Executive Council Member. To view Sarah's full bio, please visit: <https://dglegal.co.uk/the-team/sarah-charlton/>

James Wright | Consultant | DG Legal

James' career in Legal Finance spans over 25 years, working in medium to large law firms, managing their legal finance functions. His knowledge and experience in understanding the SRA Accounts Rules has enabled him to provide extensive support to the COFA and build processes and procedures to enable compliance. James has also been a Tutor for the Institute of Legal Finance and Management for their Diploma course, which during his time saw the number of students passing their final exam rise to 90%. James has also written practice and guidance notes both internally and for external clients and legal software providers. To view James' full bio, please visit: <https://dglegal.co.uk/the-team/james-wright/>



Guest Speaker

- “David graduated from the University of South Wales with a Bsc Hons Degree in Renewable Energy Systems and is co-founder of two businesses; Zebra EM which is a software management company that develops and manages software in the renewables and waste industry. He is also co-founder of BlueZebra Tech Solutions, which is a full service tech solution business servicing the professional service sector, alongside his co-founders James and Sarah. Prior to this he had a number of role’s that span from technology centre’s through to working alongside Sarah in a law firm. More recently David was recognised as a 35-under-35 winner at the RWM Expo. Project Management is one of the many talents David possesses

Today's Session



WHY IS PM
IMPORTANT?



KEY STAGES



QUESTIONS



MITIGATING RISK

Types of projects

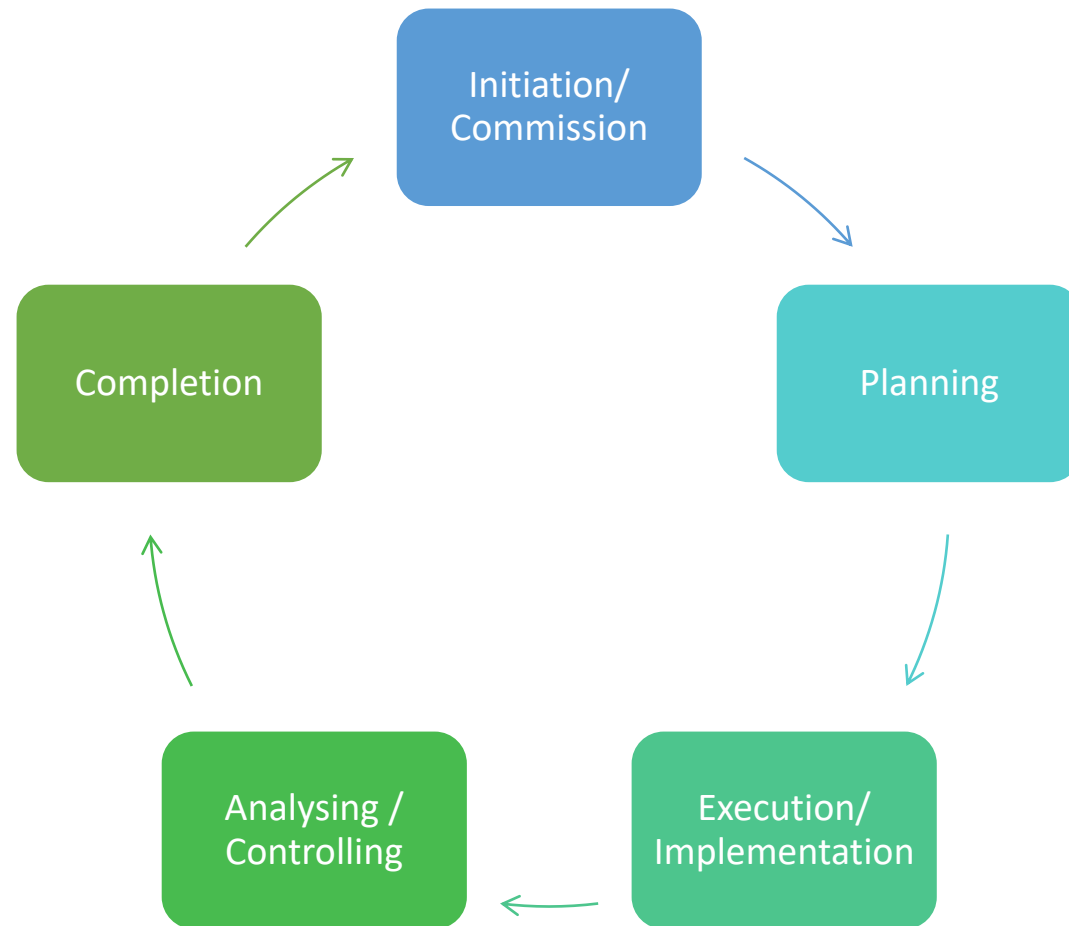
- Business implementation
- Business improvement
- Infrastructure changes (new office, IT system)
- Product development



Project Initiation Document

- What? - Scope of project
- Why? - Justification of project
- How? – Costing, funding and resources
- Who? – Roles, responsibilities, accountability.
- When? - Timescale

Key Stages



Project Commission/Initiation

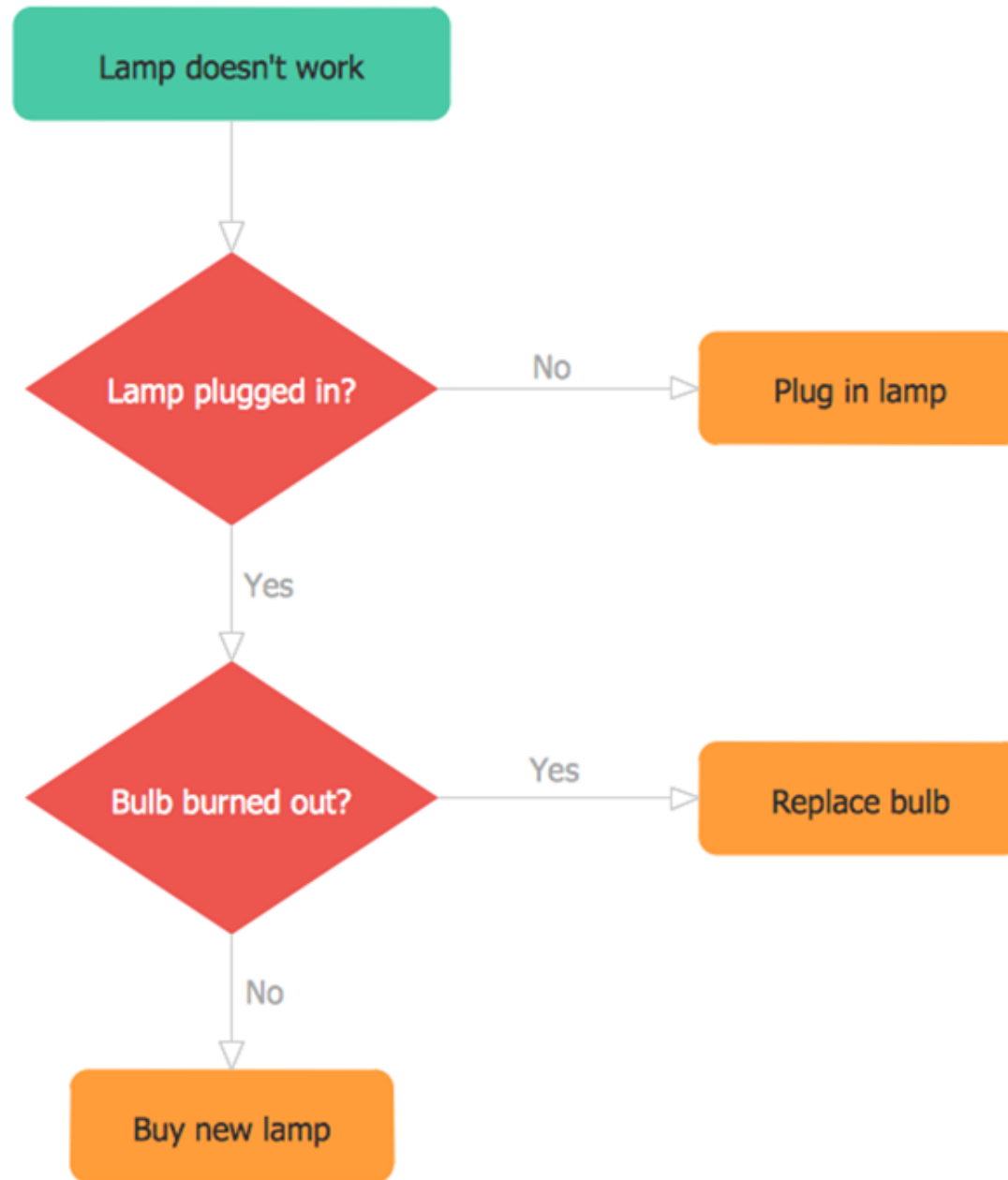
What are you trying to achieve?

- Greater efficiency
- More compliant
- Improve quality
- Improve client experience

Planning & Organising



Process Map



Execution/Implementation





Analysis/Control

Completion



Q&A

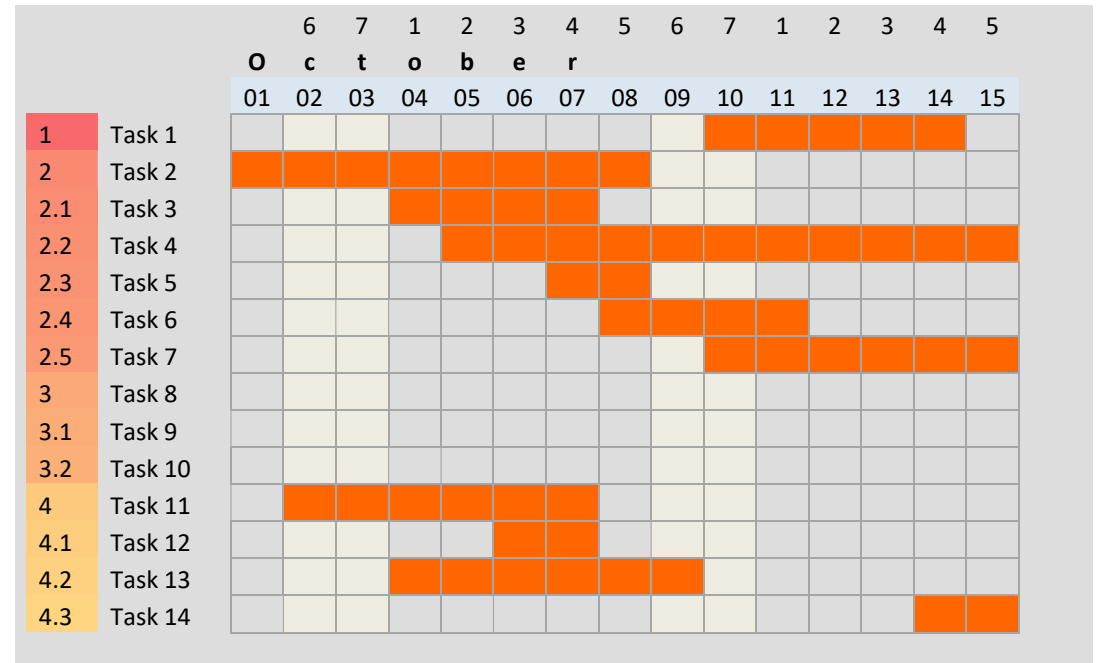
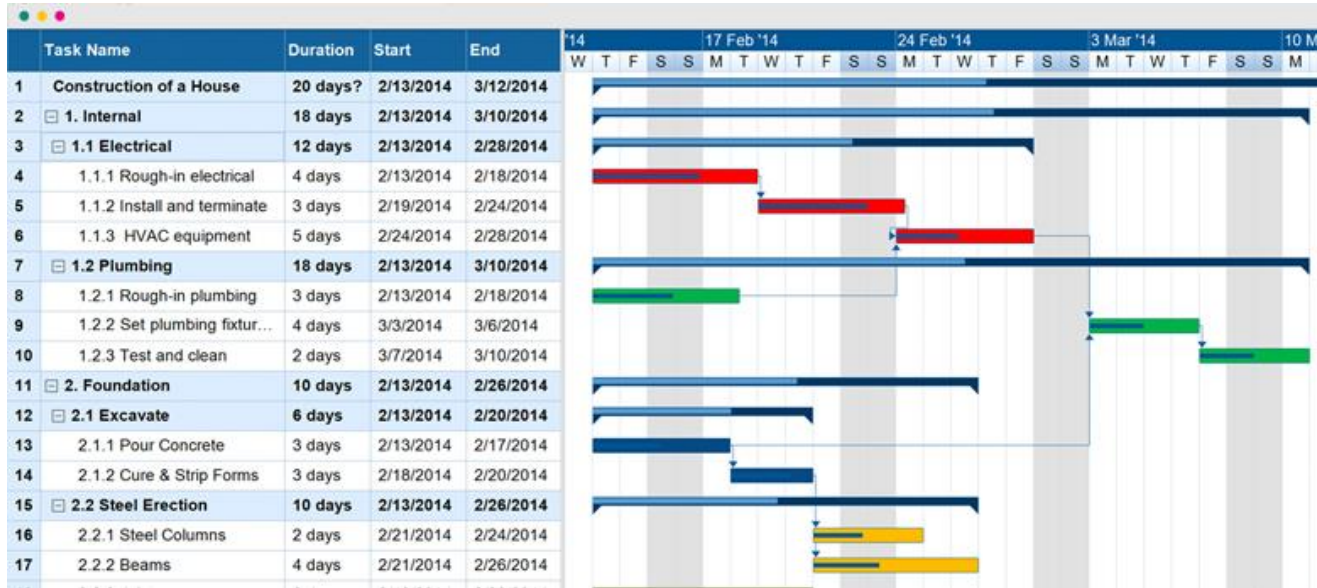
The logo features the text "Blue Zebra Tech Solutions" in a white, rounded, sans-serif font. The text is centered horizontally and overlaid on a background of diagonal black stripes on a blue gradient. The stripes are thick and spaced evenly, creating a zebra-like pattern.

Blue Zebra Tech Solutions



Mitigating Risk

Tools



Conclusion





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