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COURSE BROCHURE

# Legal Matter Scoping and Budgeting Training Course

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Registered in the United Kingdom and Saudi Arabia

# Legal Matter Scoping and Budgeting Training Course

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Legal Matter Scoping and Budgeting is a 1-week training course for lawyers, partners, legal operations staff and in-house counsel who run matters, and each participant leaves with a matter plan for one live file. Clients and general counsel now expect a clear scope, a reasoned fee estimate and early warning when either moves, and unplanned scope drift is a leading cause of write-offs. Jupiter Prime Training runs this course on legal matter scoping and budgeting.

## Why Legal Matter Scoping and Budgeting Matters Now

Three forces shape legal matter scoping and budgeting today: clients who ask for fixed or capped fees instead of open hourly billing, in-house legal teams that must defend their spend to finance, and matter management systems that record time against phase and task codes. Firms and legal departments that agree scope at intake, price it from evidence and report variance early protect realisation and client trust; those that scope loosely meet disputed invoices, write-downs and strained relationships at the end of the matter. The course rests on the three pillars of time, budget and scope, applied to legal work.

## Who Gains Most from Legal Matter Scoping and Budgeting

- Lawyers who lead files and agree the scope of instructions with clients
- Partners responsible for fee estimates, pricing proposals and matter realisation
- In-house counsel who instruct outside firms and approve their invoices
- Legal operations staff who run intake, matter systems and spend dashboards
- Senior associates who staff matters and delegate tasks to junior colleagues

A practice group or legal department gains most when partners, matter leads and legal operations attend together.

## Legal Matter Scoping and Budgeting Capabilities

Participants turn instructions into priced, staffed and tracked matters, with clear rules for handling change of scope.

- Specify a scope statement with assumptions and exclusions — client engagement letter
- Calculate a phase-based fee estimate from historic matter data — pricing proposal
- Design a staffing and delegation plan matched to task complexity — partner leverage
- Map a legal process to remove rework and hand-off delay — practice efficiency
- Build a matter status report that flags budget variance early — client and finance
- Communicate a change-of-scope request before work exceeds the estimate — fee recovery

## Key Legal Matter Scoping and Budgeting Terms

- Scope statement — A written description of the work a matter covers, its assumptions and what is excluded.
- Phase and task codes — Standard labels for stages and activities of a matter used to record time.
- Fee estimate — A reasoned forecast of the fees for a matter or phase.
- Realisation — The share of recorded time value that is billed and collected.
- Change of scope — Work that falls outside the agreed scope statement.
- Budget variance — The gap between estimated and actual fees for a phase.

## Legal Matter Scoping and Budgeting Day by Day

## Day 1: Matter Economics and Client Expectations

- Time, Budget and Scope Pillars — Profitability of Legal Work
- Alternative Fee Arrangements — Choice Between Hourly, Capped and Fixed Fees
- Realisation and Write-Off Analysis — Where Matters Lose Value
- Client Value Interviews — Priorities Behind the Instruction
- Matter Intake Checklist — Acceptance of New Instructions

## Day 2: Scoping the Matter

- Scope Statement Drafting — Assumptions and Exclusions Agreed at Intake
- Work Breakdown by Phase and Task Codes — Structure of the Matter
- Risk and Uncertainty Register for Matters — Contingency in the Estimate
- Engagement Letter Scope Clauses — Client Approval of Boundaries
- Change-of-Scope Protocol — Handling Requests Outside the Agreed Work

## Day 3: Estimating Fees and Staffing

- Historic Matter Data Benchmarks — Evidence for Phase Estimates
- Bottom-Up Fee Estimating — Pricing Proposal for the Client
- Staffing Pyramid and Leverage — Who Performs Each Task
- Delegation Briefs for Junior Lawyers — Quality and Time Control
- Fee Estimate Presentation — Negotiation With Clients and General Counsel

## Day 4: Legal Process Mapping and Matter Tracking

- Legal Process Mapping — Removal of Rework and Hand-Off Delay
- Matter Checklists and Templates — Consistent Execution Across Files
- Time Recording Against Phase Codes — Accurate Budget Tracking
- Budget Variance Thresholds — Triggers for Partner Escalation
- Matter Status Report Design — Updates for Clients and Finance

## Day 5: Practising the Matter Plan

- Scope Statement for a Live File — Application of Day 2 Methods
- Phase Estimate and Staffing Table — Application of Day 3 Methods
- Mapped Process and Status Report — Application of Day 4 Methods
- Change-of-Scope Role Play — Client Conversation Under Fee Pressure
- Matter Plan Completion — Scope, Estimate, Staffing and Reporting in One File

## Applying Legal Matter Scoping and Budgeting After the Course

- Rewrite the scope statement and phase estimate for one open matter and agree any change of scope with the client.
- Introduce a monthly matter status report with variance thresholds for the matters a practice group leads.

## Legal Matter Scoping and Budgeting Questions FAQ

### What is legal matter scoping and budgeting and why does it matter now?

Legal matter scoping and budgeting is the discipline of defining the work on a legal matter, pricing it and tracking it against the estimate. It matters now because clients expect predictable fees and loose scoping drives write-offs.

### Which roles gain most from legal matter scoping and budgeting?

Partners, matter leads, senior associates, in-house counsel and legal operations staff gain most. They scope, price, staff and report on matters.

### How does legal matter scoping and budgeting differ from a general project management course?

Legal matter scoping and budgeting applies planning methods to legal files specifically. It works with engagement letters, phase and task codes, realisation and change of scope.

### What do you bring back from legal matter scoping and budgeting?

You bring back a matter plan for one live file: a scope statement, a phase-based fee estimate, a staffing table, a mapped process and a status report format.

## Legal Matter Scoping and Budgeting: The Way Forward

The matter plan gives partners and matter leads one document that links scope, estimate, staffing and reporting. Its first use is the conversation with the client about what the fee covers and what falls outside it. After the first matter closes, compare actual phase fees with the estimate and refine the benchmarks for the next one.