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COURSE BROCHURE

# In-House Litigation Portfolio Management Training Course

29 March – 2 April 2027
Vienna

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Registered in the United Kingdom and Saudi Arabia

# In-House Litigation Portfolio Management Training Course

**Ref:** 1238_46591 **Date:** 29 March – 2 April 2027 **Location:** Vienna **Fees:** 5900 GBP

In-House Litigation Portfolio Management is a 1-week training course for in-house counsel and legal department managers who oversee a company's lawsuits and claims, and who leave with a Litigation Tracker and Settlement Decision Framework. Boards now expect a clear view of dispute exposure, spend and likely outcomes, not a list of case numbers. Jupiter Prime Training offers this in-house litigation portfolio management course.

## Why In-House Litigation Portfolio Management Matters Now

Three groups shape how a company handles its disputes. Finance teams want litigation reserves and legal spend forecast with the same discipline as other liabilities. Business units want early, honest answers on whether to fight, settle or change practice. External law firms bill by the hour and pursue each case on its own terms unless the client sets direction. A department that runs its cases as a portfolio settles weak claims early, concentrates effort on cases that set precedent and reports exposure credibly. One that does not finds costs drifting, evidence lost and settlement chances missed.

## Who Gains Most from In-House Litigation Portfolio Management

- Counsel responsible for intake and first assessment of new claims against the company
- Managers who allocate cases to external law firms and approve their budgets
- Lawyers who brief business owners and finance on exposure and reserves
- Officers who preserve documents and coordinate witnesses for live disputes

A legal department handling a growing caseload across several business units gains most when its litigation and finance contacts attend together.

## In-House Litigation Portfolio Management Capabilities

Participants learn to see every dispute as part of one portfolio with its own risk, cost and timetable.

- Design an intake route that captures each claim, deadline and evidence source on day one — the general counsel
- Assess merits, value and likely duration through early case assessment — business owners deciding to defend or settle
- Calculate litigation budgets by phase and compare them with actual spend — finance and reserve setting
- Specify instructions, reporting rhythm and fee terms for external counsel — law firm relationship managers
- Apply evidence preservation steps and legal hold notices — IT, records and witness owners
- Weigh settlement options with a decision tree and walk-away point — the executive approving settlement

## Key In-House Litigation Portfolio Management Terms

- Early case assessment — a structured first evaluation of facts, law, value and cost used to set the strategy for a new dispute.
- Litigation hold — a written instruction to staff to preserve documents and data that may be relevant to a dispute.
- Phase budget — a cost estimate split into stages such as pleadings, disclosure, hearing and appeal, tracked against actual invoices.
- Exposure — the realistic financial and reputational loss a company faces if a dispute goes against it.
- Decision tree — a diagram setting out outcomes, probabilities and costs so settlement can be compared with trial.
- Litigation tracker — a single register of every active dispute with status, deadlines, spend, exposure and owner.

## In-House Litigation Portfolio Management Day by Day

### Day 1: Disputes as a Portfolio

- Portfolio View of Disputes — Volume, Value and Recurring Causes
- Claim Intake Form — Facts, Deadlines and Evidence Sources
- Dispute Categorisation — Commercial, Employment, Construction and Regulatory Claims
- Stakeholder Map — Business Owners, Finance, Insurers and Witnesses
- Limitation and Procedural Deadline Diary — Avoiding Missed Steps

### Day 2: Early Case Assessment

- Merits Assessment Grid — Facts, Law and Evidential Strength
- Exposure Estimate — Best, Likely and Worst Outcomes
- Insurance Coverage Check — Notification and Policy Conditions
- Root-Cause Note — Business Practices Behind Repeat Claims
- Case Strategy Statement — Defend, Settle or Counterclaim

### Day 3: Budgets and External Counsel

- Phase Budget Template — Pleadings, Disclosure, Hearing and Appeal
- Law Firm Selection Criteria — Expertise, Team and Fee Basis
- Instruction Letter — Scope, Reporting Rhythm and Approval Limits
- Invoice Review — Spotting Overstaffing and Scope Creep
- Alternative Fee Arrangements — Capped, Fixed and Success Fees

### Day 4: Evidence and Settlement Decisions

- Litigation Hold Notice — Preserving Emails, Files and Devices
- Witness Coordination Plan — Statements, Availability and Preparation
- Decision Tree Modelling — Comparing Trial and Settlement Values
- Settlement Authority Matrix — Who Approves Which Offer
- Healthcare and Retail Case Studies — Settlements That Limited Exposure

## Day 5: Practising the Litigation Tracker and Settlement Decision Framework

- Intake and Assessment Applied — Processing Three New Sample Claims
- Budget Applied — Setting Phase Budgets for the Sample Claims
- Settlement Analysis Applied — Valuing an Offer Under Time Pressure
- Board Exposure Report — One-Page Summary of the Portfolio
- Litigation Tracker and Settlement Decision Framework — Final Version

## Applying In-House Litigation Portfolio Management After the Course

- Load every open dispute into the litigation tracker with exposure, phase budget and owner, and present it to the general counsel.
- Run an early case assessment on the next new claim and record the agreed strategy before instructing external counsel.

## In-House Litigation Portfolio Management Questions FAQ

### What is in-house litigation portfolio management and why does it matter now?

In-house litigation portfolio management is the practice of steering all of a company's disputes as one set of risks and costs. It matters now because boards and finance teams expect accurate exposure figures and controlled legal spend.

### Which roles gain most from in-house litigation portfolio management?

In-house counsel who receive and assess claims and legal department managers who instruct law firms gain most. Lawyers who report exposure to finance also benefit.

### How does in-house litigation portfolio management differ from a courtroom advocacy course?

In-house litigation portfolio management focuses on the client side: intake, assessment, budgets, law firm oversight and settlement decisions. A courtroom advocacy course trains the lawyer who argues the case before a judge or tribunal.

### What do you bring back from in-house litigation portfolio management?

You bring back a working litigation tracker, phase budget template, legal hold notice and settlement decision tree tested on sample claims.

## In-House Litigation Portfolio Management: The Way Forward

The Litigation Tracker and Settlement Decision Framework brings every dispute, deadline, budget and settlement option into one view. Its first use is deciding which open claims to settle this quarter. Counsel, managers and finance colleagues rely on it for reserves and reporting. After the first year, the root causes it records deserve a fresh look with business owners to prevent repeat claims.