

## Client Alignment Tool

The creation of the CLIENT ALIGNMENT TOOL establishes the Anticipated Range of Outcomes and essentially is a plan of action shared with and agreed to by the client. The CLIENT ALIGNMENT TOOL ensures that both parties have the same expectation as to the result of the project. The CLIENT ALIGNMENT TOOL should include the objectives of the project as well as costs, strategies, and unknowns.

### Checklist:

- Begin investigation and planning based on [KICK-OFF MEETING PLANNER](#).
  - Investigate, Analyze, Reconsider (Doubt)
- Identify and ascertain material facts using [PRELIMINARY INVESTIGATION CHECKLIST](#).
  - Identify critical matters and critical facts
  - Ascertain manageability of each component
  - Identify matters outside of your control
- Identify goals of the client.
- Reach conclusion or consensus on Anticipated Range of Outcomes.
- Identify specific resources needed using [TASK ASSIGNER](#).
  - Human, financial, and material resources
- Create Internal and External Strategic Plan using the [STRATEGY AND TACTICS CHECKLIST](#).
- Identify tactics using the [STRATEGY AND TACTICS CHECKLIST](#).
- Develop activities flowchart, task list, and timeline incorporating resources, costs, and time required.
- Meet with client and present Anticipated Range of Outcomes.
- Adjust planning and expectations as necessary.

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### Lean Routine:

1. Is there a clearly defined process established?
2. Has the [KICK-OFF MEETING PLANNER](#) established at least a draft or “rough” Anticipated Range of Outcomes?
3. Is the planning process logical and based upon results of the preceding phase?
4. Does the planning consider possible outcomes and recoveries, costs, amount of time, as well as other factors?
5. Does the planning process incorporate “doubt” to revisit and question assumptions? (Investigate-Analyze-Doubt)
6. Does the planning consider the goals of the CLIENT?
7. Is the process easy to follow and charted?
8. Has the planning process defined the desired outcome?
9. Have critical players/resources been analyzed and identified?

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10. In allocating resources using the [TASK ASSIGNER](#), are internal legal teams/staff attorneys included?
11. In allocating resources using the [TASK ASSIGNER](#), are other key players included, such as business managers, expert witnesses, and PMKs?
  - Have unimportant and irrelevant materials been identified and eliminated through the use of the [PRELIMINARY INVESTIGATION CHECKLIST](#)?
12. Have material facts been identified and ascertained?
13. Is the internal strategy sound and based on ascertainable facts?
14. Have you considered all possible strategies?
15. Will the strategy allow you to create an alignment tool that clearly communicates to the client an “Anticipated Range of Outcomes”?
16. Does the Anticipated Range of Outcomes anticipate client reaction?