

Corporate Litigation Portfolio and Case Management Training Course

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Course Overview

The Corporate Litigation Portfolio and Case Management Training Course equips in-house teams to govern multiple disputes as a controlled business portfolio. Participants build a practical system for corporate litigation portfolio and case management, from intake and strategy through procedure, evidence, counsel, cost, settlement, trial readiness, outcome review, and closure. The applied learning experience is delivered by Agile Leaders Training Center.

The course integrates litigation intake and early case assessment, outside counsel and litigation budget management, discovery evidence and legal hold coordination, and litigation risk reserve and executive reporting. It focuses on management and governance rather than courtroom advocacy, construction claims, or jurisdiction-specific legal advice.

Who Should Attend

- In-house counsel and litigation managers
- Legal operations and dispute-management professionals
- Claims leaders and senior paralegals
- Professionals overseeing outside counsel and multiple disputes

Course Objectives

- Apply consistent intake, triage, ownership, conflict, and preservation controls.
- Translate legal and business objectives into case strategy, milestones, and decision rights.
- Control procedural calendars, discovery, evidence, experts, vendors, and trial readiness.
- Select, instruct, monitor, and evaluate outside counsel against agreed guidelines.
- Build phase-based budgets, review fees, forecast exposure, and escalate variance.
- Report risk, reserves, settlement options, portfolio trends, and lessons to decision-makers.

Day 1: Intake, Assessment, and Portfolio Governance

- Dispute Intake, Conflict, Ownership, and Matter Opening Checklist
- Early Case Assessment: Facts, Law, Evidence, Exposure, and Objectives
- Case Classification, Priority, Materiality, and Escalation Criteria
- Decision Rights, Privilege Awareness, Confidentiality, and Governance Map
- Exercise: Build an Intake and Early Case Assessment Record

Day 2: Strategy, Procedure, and Case Planning

- Case Theory, Business Objective, Option, and Success Measure
- Pleading, Motion, Hearing, Discovery, and Trial Milestone Plan
- Procedural Calendar, Deadline, Dependency, and Responsibility Register
- Scenario, Decision Tree, Settlement Point, and Authority Threshold
- Exercise: Create a Litigation Strategy and Milestone Plan

Day 3: Evidence, Discovery, and Readiness

- Discovery Evidence and Legal Hold Coordination Workflow
- Custodian, Source, Collection, Review, Production, and Audit Trail
- Witness, Expert, Document, Exhibit, and Deposition Workstream
- Issue, Evidence Gap, Motion, Hearing, and Trial Readiness Dashboard
- Exercise: Build an Evidence and Readiness Control Plan

Day 4: Outside Counsel, Budget, and Vendors

- Outside Counsel Selection, Engagement, Scope, and Instruction Pack
- Staffing, Communication, Reporting, Billing, and Approval Guideline
- Phase-Based Budget, Assumption, Forecast, Accrual, and Variance Control
- Expert, E-Discovery, Court Reporter, and Litigation Vendor Oversight
- Exercise: Review a Counsel Plan, Budget, and Invoice Exception

Day 5: Risk, Settlement, Reporting, and Closure

- Exposure Range, Probability, Reserve Input, and Change Trigger
- Settlement Evaluation, Negotiation Mandate, and Approval Record
- Executive Dashboard: Status, Cost, Risk, Decision, and Next Action
- Outcome Review, Cost Recovery, Precedent, Lesson, and Matter Closure
- Capstone: Litigation Portfolio Control Pack

Practical Exercises

- Triage a new dispute and prepare an early case assessment.
- Build a case strategy, procedural calendar, and decision-rights map.
- Coordinate a legal hold and evidence workstream.
- Challenge an outside-counsel budget and invoice variance.
- Prepare a risk, reserve, settlement, and executive reporting pack.

Frequently Asked Questions

Is this a courtroom advocacy course?

No. It teaches corporate oversight, portfolio governance, case controls, counsel management, and business decision support.

Is it limited to one jurisdiction?

No. Participants learn transferable controls and must map them to applicable procedural rules, court orders, professional duties, and local advice.

How are legal holds and discovery handled?

The course covers governance and coordination: triggers, custodians, sources, preservation, collection, review, production, documentation, and escalation.

How are outside-counsel costs controlled?

Through scoped instructions, approved staffing, phase budgets, assumptions, accruals, billing rules, variance thresholds, and outcome reviews.

What is included in the final control pack?

It contains intake, assessment, strategy, calendar, evidence, counsel, budget, risk, settlement, reporting, and closure controls.

Conclusion

Participants leave with a repeatable operating system for timely, cost-conscious, risk-informed management of corporate litigation.

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