





Doing More with Less

INCREASING THE PRODUCTIVITY OF SECRETARIAL STAFF CAN BE ACHIEVED IN A SHORT PERIOD OF TIME THROUGH A PRESCRIPTIVE LEARNING PROGRAM. THE RESULTING EFFICIENCY TRANSLATES TO INCREASED ATTORNEY-TO-SECRETARY RATIOS, REDUCED OVERTIME, INCREASED MORALE AND THE POTENTIAL TO ADD FEE EARNERS WITHOUT THE COMMENSURATE SECRETARIAL COST.

BY GINA BUSER

Recent economic challenges have forced law firms to evaluate every aspect of their businesses in order to remain profitable. Downward pressures on billing rates – often coupled with reductions in billable hours – have left many firms scrambling to find additional revenue. Alternative fee arrangements and fixed price billing may guarantee revenue streams, but often at lower effective rates.

To offset the reductions in revenue, most firms are looking for every possible way to reduce costs. Overhead expenses such as office space and equipment, supplies, entertainment and travel have been cut to the bone. Bonuses and other perks have been rolled back. However, the largest expense for most firms by far is the cost of their people – including not only the salaries of the fee earners, but also those of the highly skilled staff required to support them.

In an effort to do more with less, many law firms continue to increase their ratios of attorneys to secretaries. It is no longer shocking to see ratios of 3:1 and upward, with some firms approaching numbers as high as 6:1! Legal secretaries often do not have excess capacity to handle larger volumes of work during normal business hours. Secretarial overtime to manage the greater workloads is not only a morale killer, but the increased expense can minimize or negate the cost savings of the higher ratio.

The challenge is how to increase the productivity of legal secretaries in order to support ever larger numbers of attorneys. Traveling Coaches Inc. has developed a process through which secretarial productivity can be significantly and rapidly increased and yield immediate return on investment to the firm.

DOCUMENT PRODUCTION: THE AREA OF GREATEST IMPACT

While there are several areas in which performance may be improved, the first place a law firm should invest its energies is in the area of document production. Because secretaries spend much of their time on document-related activities, it is here that a firm can realize immediate and significant increases in productivity and reductions in attorney support costs.

Maximizing the efficiency of the document production process is also necessary to support alternative billing arrangements such as fixed fees for services. Finally, improved document production results in better customer service at a time when competition for new business is fierce and client retention is vital.

The mission-critical technology application in any law firm is the production of documents. Firms get paid by moving intellectual property from the heads of their fee earners into the hands of their clients in the form of documents. Whether delivered on paper, sent via e-mail or an electronic filing, a document is still a document and it is the deliverable, the “product” of the law firm. To increase profitability, firms must organize their resources in such a way as to deliver the most products (documents) for the least amount of cost (labor). The solution is to maximize the performance of the secretaries (and the attorneys) through improved information technology initiatives.

FOUR STEPS TO PERFORMANCE IMPROVEMENT

The first step toward performance improvement is to identify the core competencies required of every secretary in order to perform at an acceptable level. Core competencies are those skills necessary to effectively and efficiently use technology according to established legal industry and firm best practices. These core competencies should be documented and made public. The exercise of documenting the firm’s core competencies provides guidance for the current staff and a foundation to bring future talent up to speed quickly.

With respect to document production, the ability to use Microsoft Word to create, edit and repurpose content includes dozens of core competencies. Unfortunately, many legal

secretaries have acquired their technology skills on the job rather than in an objective-based training program. This mixture of friendly advice coupled with trial and error often results in a mixed bag of techniques and skill levels.

Additionally, new skills are required today, as original document drafting shifts from the secretaries to the fee earners. Fee earners are less likely to possess adequate skills to produce and correctly format documents, leaving the secretaries to clean up and reformat documents as part of this new workflow. Beyond the traditional core competencies needed to generate quality draft documents, legal secretaries are now expected to analyze, edit and modify document formatting.

Traveling Coaches’ experience is that an average legal secretary is proficient in less than 65 percent of the core competencies required to use Microsoft Word in the production of legal documents. Given that an average secretary spends at least one half of every day working on documents, this means each secretary could be wasting as many as eight hours per week. It is little wonder firms pay for overtime and can expect even more if they increase their attorney-to-secretary ratios.

The second step is to perform a baseline skills assessment of every secretary to determine which competencies each has mastered and which require additional attention. The skills required to create and format legal documents cannot be accurately assessed using quizzes and surveys alone. The most reliable way to evaluate skills in a complex application such as Microsoft Word is via a hands-on exercise through which secretaries are given instructions to create and format a legal document representative of the essential core competencies. The resulting document is then analyzed to determine if its construction is consistent with industry best practices. (Because manual analysis of the assessment documents is extremely time consuming, particularly for a large group of secretaries, clients can be provided with automated assessment tool to analyze and score each secretary’s work product.)

The third step is to implement a program of prescriptive learning. Such a program includes custom learning plans for each secretary, with recommended training to address unique skills



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gaps. Training must be task-specific and offered in a variety of formats. Both instructor-led and e-learning should be offered to accommodate different learning styles. The training should be specific and hands-on to reinforce the lessons learned.

The fourth step is to retest and report progress. After secretaries complete individual learning plans, the skills are again assessed and compared to their baselines to measure improvement and determine if they now have mastery of all required core competencies. If deficiencies still exist, additional training and retesting are recommended.

SIGNIFICANT RETURN ON INVESTMENT

The return on investment for a prescriptive training program is rapid and substantial. It is reflected in increased secretarial productivity, which results in reduced overtime expenses and higher attorney-to-secretary ratios. The cost of document production inefficiency often exceeds the investment in a prescriptive training program by hundreds of percent.

Consider a 1,000-user firm with 150 legal secretaries. Each secretary spends an average of four hours per day creating and editing documents with Microsoft Word. The baseline skills assessment indicates that, on average, each secretary is only 64 percent proficient at the firm's established core competencies. After a prescriptive training program, the average proficiency is increased to 95 percent. The annual amount of time recouped by the increased productivity is equivalent to an additional 22 secretaries and can be used to reduce or eliminate overtime expenses. The attorney-to-secretary ratio is also increased from 3.33 to 3.92, which means the firm could hire as many as 100 additional attorneys without hiring additional secretaries.

If the average secretary receives \$65,000 in annual salary and benefits and works three

overtime hours per week at a rate of \$45 per hour, as much as \$1,012,500 can be saved. The investment in an assessment management system and modular curriculum for a firm of this size is less than \$200,000, which means the first-year return on investment can be as high as 414 percent. Reducing overtime by only one hour per week per secretary would more than pay for the prescriptive learning program. And this doesn't even consider the additional income the firm can generate by hiring more attorneys without the associated secretarial support cost.

Beyond the money saved by the increased proficiency are the intangible benefits of improved morale and increased employee productivity. Research links employee morale to positive business outcomes and improved customer service. Significant savings are also achieved by new talent up to speed and producing high-quality documents quickly.

HIGHER EFFICIENCY, PRODUCTIVITY

Increasing the productivity of secretarial staff can be achieved in a short period of time. The resulting efficiency translates to increased attorney-to-secretary ratios, reduced overtime, increased morale and the potential to add fee earners without the commensurate secretarial cost. As the cost savings vastly exceed the investment in a prescriptive learning program, it is little wonder forward-thinking firms are choosing to invest in their staff in this way. ✱

about the author

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