

**Why is skills assessment such a hot topic for law firms? The reasons are as varied as the firms. For some, it's because of their huge investment in technology.** Are they getting their money's worth? For others, they want a way to measure training success. They've taught their users Word and how to use all the wonderful tools they've purchased. So did the training program work?

For many firms, ongoing training programs are waning. Classes are being offered, but attendance is at an all time low. Secretaries claim they already know what they need to know to do their jobs. But do they? Assessing skills in this situation is a way for the secretaries to prove they have the "right stuff."

No matter what your firm's reasons may be for thinking assessment, you're not alone. So what are some of the realities in law firms that have brought us to this point?

**The need for increased productivity in response to changing attorney/secretary ratios.**

**Higher client expectations for faster document turn around.**

**The growing need to justify training dollars and prove training effectiveness.**

**Continued dependence of attorneys on secretaries for their technology needs.**

**The need to show a career path and promote career growth for secretaries.**

**And frankly, the need to get on the bandwagon when so many other firms are doing the same thing.**

## **The Big Picture**

Let's face it. Law firms are in business to make money. A firm's economic future depends on its productivity. For firms to remain competitive, they must exceed the demands and expectations of their clients. That requires a staff with skills to match the best in the industry. This is a huge challenge, because there are some deep-seated and long-standing weaknesses in skills in legal staff as a whole.

For many firms, the technology skill levels of secretaries are stagnant. Despite money, time and energy spent by firms to provide a technology environment that works for legal, many secretaries are still using technology much like they did 10 years ago. For some, their skills have not evolved much past the typewriter days.

## **What Can Be Done?**

Start by identifying which skills are needed to influence productivity, increase efficiency and promote best practices. Establish learning plans that will provide a path to the

classes that teach the right skills. Assess those skills periodically to ensure standards are met. Recognize secretaries for achieving a particular skill level.

## **What Are the Firm's Best Practices?**

The fact that law firms produce long and complex documents is nothing new. However, tools used to produce these documents have changed over the years. The typewriter skills that secretaries have used before no longer work efficiently with the sophisticated software in law firms today. Think about the important words that make up those documents. Those words should be safe-guarded and protected. They should be available to the attorneys to use and reuse as needed. The documents that hold these words should be constructed in such a way that they can live long healthy lives in the firm's document management system.

When documents fail, frustration levels rise within the firm. Poor document formatting is usually the culprit in document crashes. Our industry has known for years that there is a right and wrong way to format documents, yet our users continue to use software incorrectly. Improper document conversion, not using styles correctly, a preponderance of direct formatting — all of these things increase the risk of "bad documents."

Most firms have invested in add-on tools and have modified the Word environment to make it more "legal friendly." Secretaries should be skilled in the proper use of the tools in which the firm has invested, demonstrating a commitment to the firm and a willingness to do their best to aid in the quest to meet client demand.

## **The Importance of Core Competencies**

The idea of core competencies is to identify a baseline of document production skill levels that secretaries should have in order to work faster, produce better documents and work better together. Individuals who do not bring their skills up to the baseline can reduce the effectiveness of the entire firm.

So what are some of the core competencies for secretaries? What should the secretaries be able to do quickly, accurately and under pressure? Here are some ideas to get you started:

**Create new documents based on the firm's templates.**

**Save and properly profile documents in the document management system.**

**Locate documents based on search criteria.**

**Properly format documents according to the firm's best practices.**



Use the technology tools available the way they were designed to be used.

Assess documents for stability and clean them up when necessary.

### Creating “Real World” Assessments

Develop an assessment vehicle that closely matches the secretary's day-to-day activities. Consider the following tasks:

- Find a document in the document management system.
- Save it as a new document and apply security to the document.
- Make the requested edits to the document.
- Format the document according to the firm's best practices.
- Number the paragraphs using the firm's numbering tool.
- Create a table of contents for the document.

Each of the tasks that the secretary is asked to perform will correlate to the core competencies. Each of the core competencies is related to a class that teaches that competency. The goal is to find out what the secretaries already know and can do well, and then enroll them in classes that cover what they do not know or do well.

Assessments should be done in a proctored environment. By having a qualified trainer observe the assessment, you're able to see how efficiently the secretary works. This is very important. Think about the skill of typing. Many people can type. But the ability to type for a long period of time with very few errors and under pressure is a competency level that very few people have.

In the world of document clean-up, there are many tools and techniques that can expedite the process. Using those tools and techniques correctly can make a big difference. Cleaning-up a 60-page document without tools can take as long as 45 minutes to an hour. With specific tools, clean-up and reformatting can be done in less than five minutes.

### Score!

When our company's assessment product hit the streets last January, I was not a big fan of scoring the assessments. I focused on learning plans as well as giving the secretaries credit for what they did well in the assessment and getting them enrolled in training classes for those tasks in which they didn't perform well. Since then, our clients have convinced me that scoring is important. In fact, the next version will have scores.

Why are scores important in assessments? For pre-hire assessment, scores allow for a candidate to be qualified or not qualified for the job. In an ongoing assessment program of the firm's current staff, scores give the firm a good picture of how competent their secretaries really are. The secretaries can use their scores to gauge where they are in their skills development. What's the firm's average score? What score should the secretary strive for? When re-assessing skills down the road, scores will allow you to highlight improvements made since the last assessment.

Scores should be tracked in your firm's Learning Management System (LMS). An LMS gives you control over the firm's on-going training and assessment program. And a good LMS can assist trainers in being more effective at their own jobs.

### Recognition

Everyone needs to be recognized for his or her efforts. When the recognition comes from others, it demonstrates and confirms what the individual has achieved. Here are some ways to recognize your secretaries for reaching their assessment goals:

**Develop a certification program.** Once a secretary achieves a certain level of competency, he/she is certified at that level. Many firms have adopted the Bronze, Silver and Gold level certifications. The nice thing about a certification program is that you can have the secretaries re-assess periodically in order to maintain their certification. This will keep their skills sharp and allow you to modify the requirements for certification to keep up with technology as it changes within the firm.

**Have a special presentation conducted by firm management** where the individual is made to feel special for achieving a goal. This presentation should be attended by all secretaries so they will be inspired to achieve similar results. Additionally, special invitations should go to the attorneys for those individuals being recognized. During the ceremony, the attorneys should be thanked for supporting their secretary and allowing them the time to work towards meeting their goals.

Other suggested recognition includes a **symbol next to the secretary's name** on the phone list for achievement of a goal. Provide a special bronze, silver or gold star on a name plate and a **framed certificate** that displays the level of certification. Of course there is always the monetary reward for reaching a certain competency level. However, the money alone without the public recognition will have a smaller impact.

### Bottom Line

In order for firms to remain competitive, they must exceed the expectations of their clients. To remain profitable, they must do more with less. It's everyone's job to perform at his or her best. Using technology tools the way they were designed to be used and achieving a high level of competency is paramount. Assess your firm's secretaries periodically to ensure that competency standards are met or exceeded. Recognize your secretaries for achieving the required level of competency. Track your progress using your LMS. Document your success and share the good news with your peers.

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