

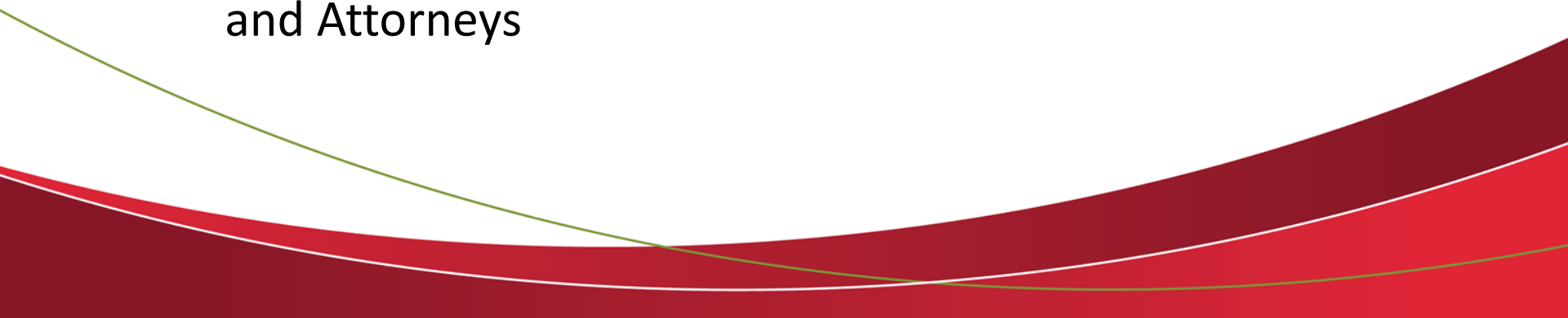


The Role of the Legal Secretary

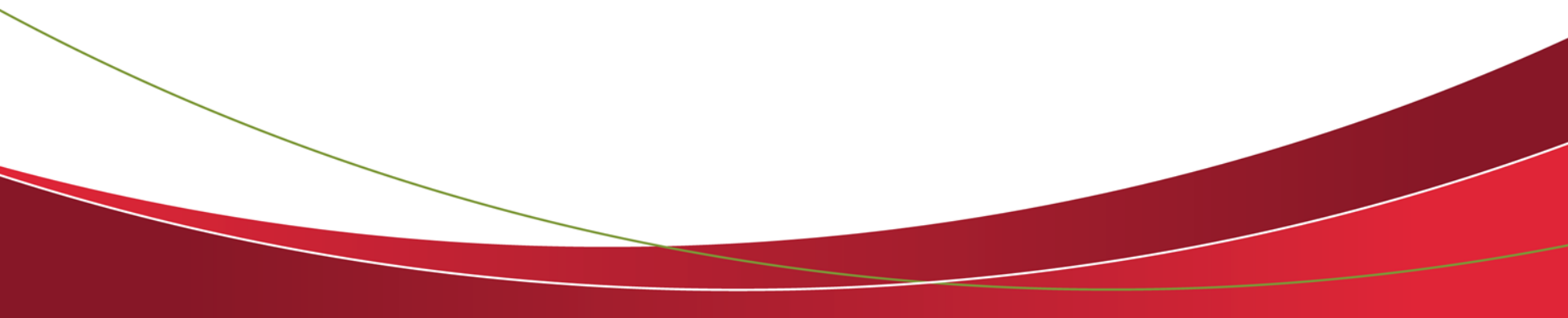
By Jennifer K. Hill

Your connection
to knowledge, resources and networking


WHY AM I HERE?

- To discuss the evolution of the role of the legal secretary who works in a variety of law firm sizes and assignments
 - To facilitate a discussion on the most effective way to utilize legal secretaries in the future
 - To shift the attitude of your legal secretaries/assistants to create greater productivity and workability when utilizing new models
 - To offer you tools to reverse the “Accidental Adversarial” relationship between Legal Secretaries and Attorneys
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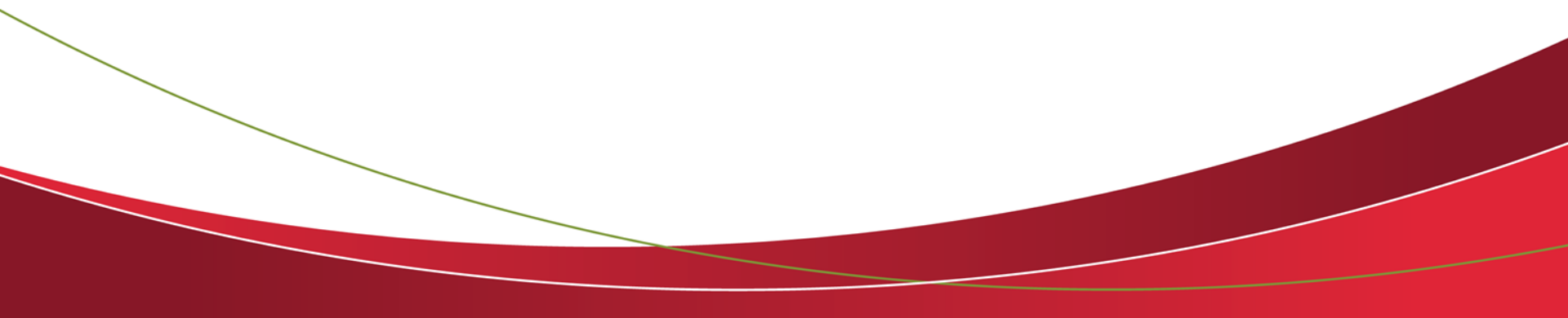
WHAT ARE WE GOING TO DO?

- Delve into the traditional model of a legal secretary and look at what does and does not work
 - Discuss the most effective ways to utilize legal secretaries in the future
 - Compare and analyze the pros and cons of alternative secretarial models
 - Overcome common obstacles that lose top legal secretaries when implementing new models
 - Enhance the efficiency of your legal secretaries by implementing tools to help your legal secretaries become indispensable
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THE SITUATION

- During the past five years the role of the legal secretary has changed significantly, particularly in a mid-sized to large firm environment
 - Technology is playing a stronger role than ever before in both the professional and personal lives of employees, and law firms are trying to adapt to these changes
 - Attorneys, particularly Associates, are able to do more of their own work, which means more lawyers are being added to each secretarial desk/pairing and less “traditional legal secretary” roles are required
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THE CHALLENGE

- Law firms are trying different methods to figure out what model and skills will be effective in the long-run to adapt to these changes. This is ongoing as things change and develop, of course, but no one method has been proven as of yet.
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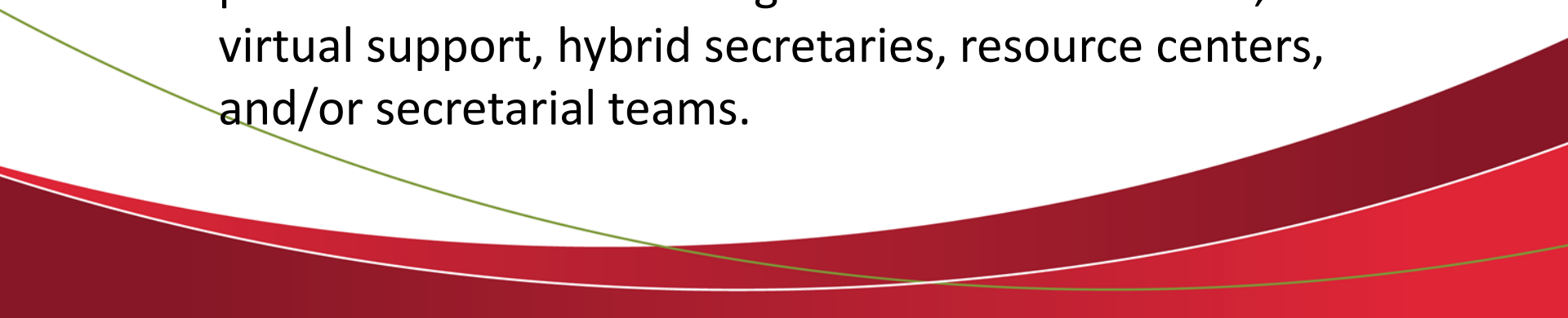
THE SOLUTION...



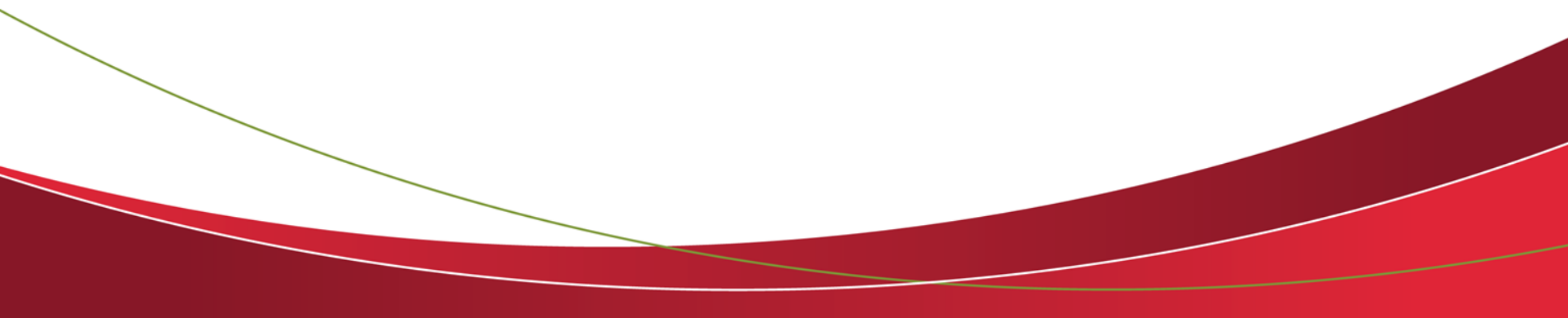
THE DEFINITION OF A LEGAL SECRETARY

- Wikipedia defines a Legal Secretary as:
“A person who works in the legal profession, typically assisting lawyers. Legal Secretaries help by preparing and filing legal documents such as appeals or motions.”
 - For our purposes, we will call this the Traditional Legal Secretary (TLS)
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THE TOP 5 CHANGES IN THE ROLE OF THE TLS

- Legal secretaries are expected to support more lawyers than ever before and prioritize work at a whole new level.
 - Legal secretaries are expected to have advanced computer skills, similar to a Word Processor, including document management systems, Word, Excel, PowerPoint and much more.
 - The role of the legal secretary is moving farther and farther away from the traditional 1:1-3:1 ratio of years past and is instead moving towards 4:1-6:1 ratios, virtual support, hybrid secretaries, resource centers, and/or secretarial teams.
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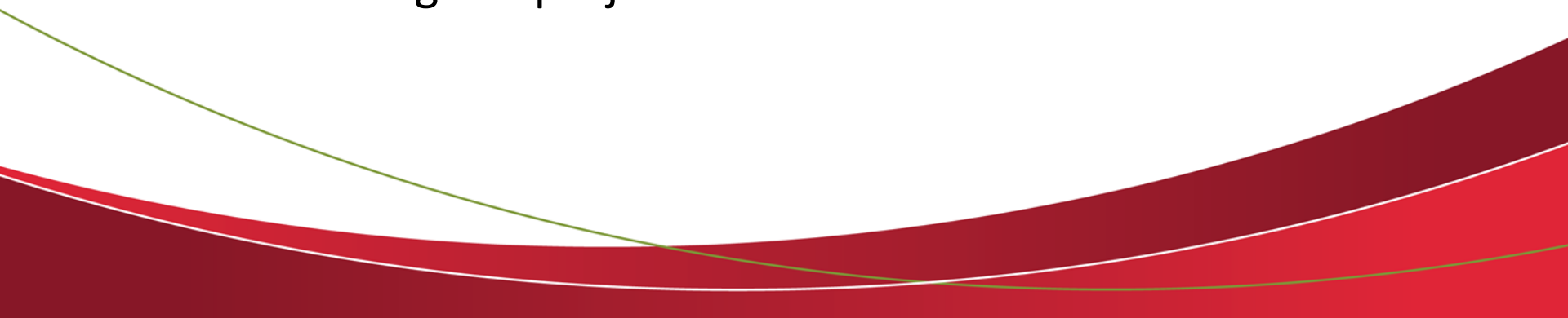
THE TOP 5 CHANGES IN THE ROLE OF THE TLS CONTINUED...

- Lawyers are becoming more self reliant and handling things that legal secretaries used to be responsible for, which leads to a new skill set required for a legal secretary in a large law firm.
 - Legal secretaries are no longer expected to specialize in one practice area; many firms prefer a legal secretary to be cross-trained in several practice areas.
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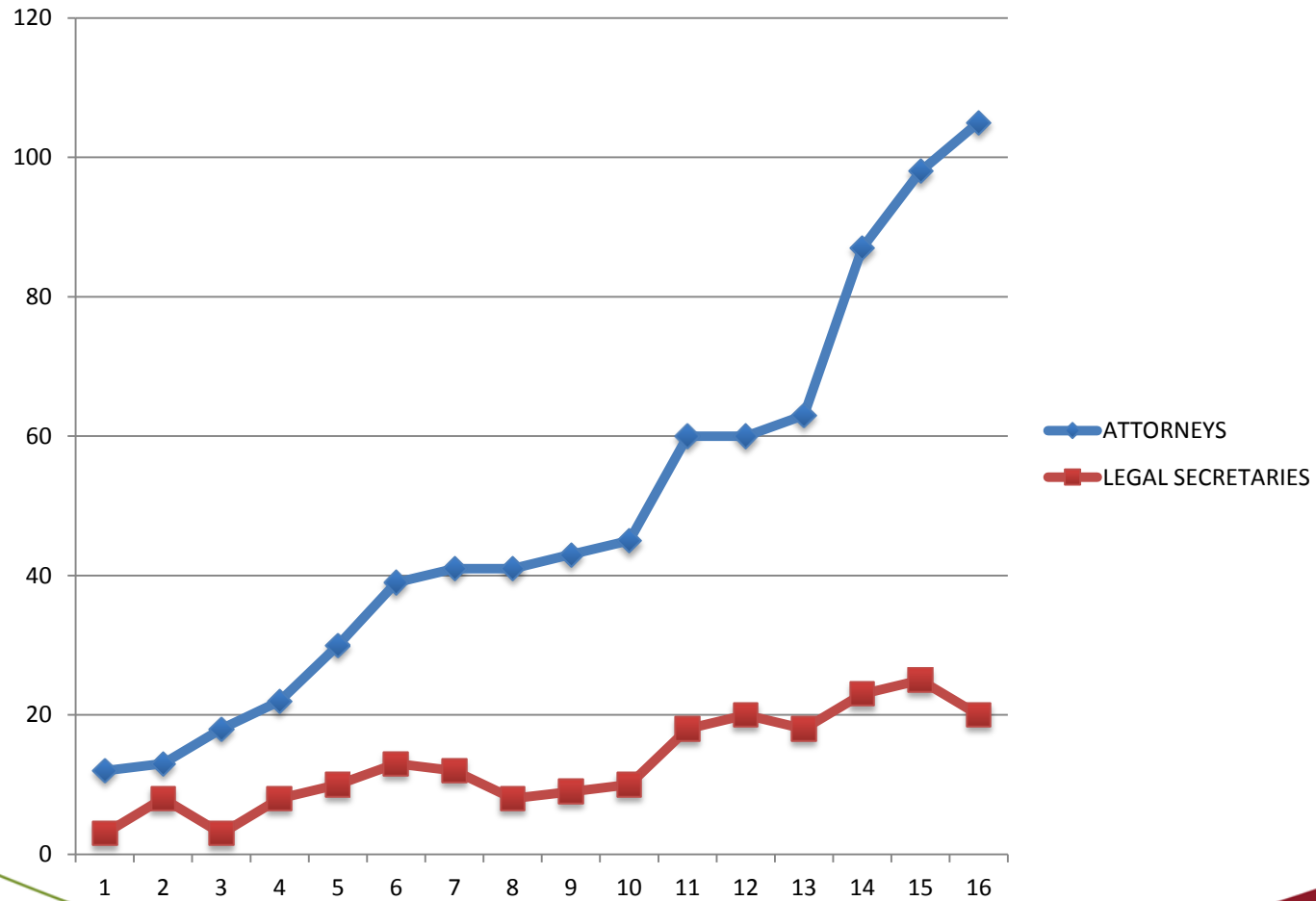
CHANGES THAT MID-SIZED TO LARGE LAW FIRMS ARE MAKING

- Some firms have lawyers who are being assigned to secretaries or “secretarial teams” in other offices
- Certain firms are creating secretarial teams and/or “resource centers” with pods of secretaries who do a variety of work and are not assigned to one particular set of lawyers
- Other firms are cross-training legal secretaries on corporate AND litigation matters and/or having them do word processing in addition to secretarial work
- Firms are also offering advanced training on Word, Excel, and other software programs to help legal secretaries adapt to the changes in the marketplace and become more tech savvy

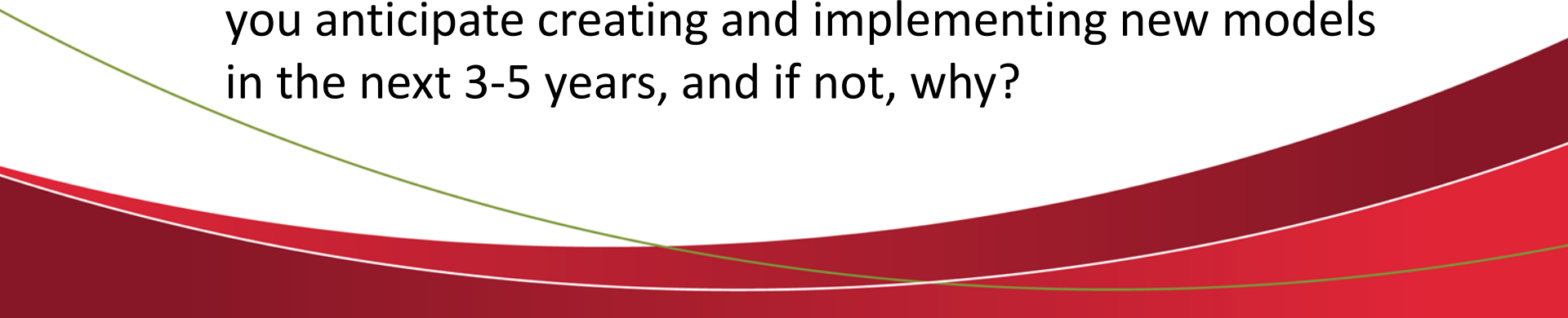
ADDITIONAL CHANGES

- Firms are moving away from some of the traditional legal secretary duties such as having secretaries answer their lawyer's phones, handle e-filing, expense reports, travel and doing time entry (certain firms have docketing departments who are taking over the court filing and other firms are getting rid of their docketing clerks)
 - Firms are hiring “project assistants” to support specific practice groups with a more experienced secretary overseeing the project assistants
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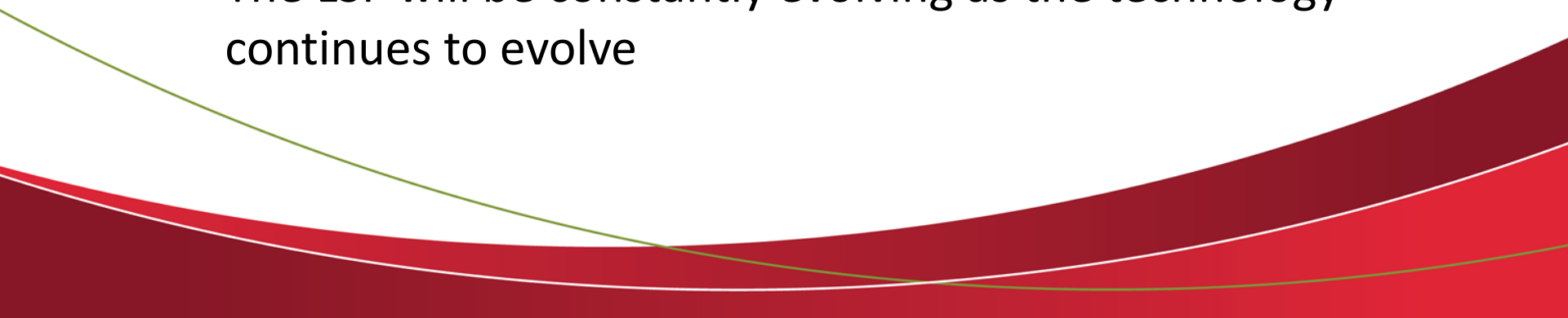
ATTORNEY TO LEGAL SECRETARY RATIO



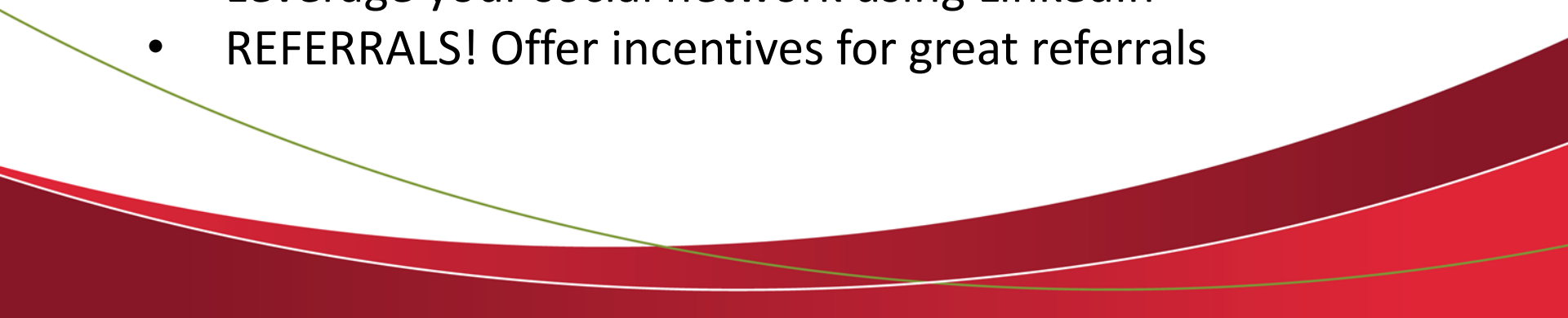
OVERVIEW & DISCUSSION POINTS

1. What is the biggest change in the past 3-5 years in the way that you are utilizing your legal secretaries?
 2. What are your criteria for hiring legal secretaries?
 3. What alternative models are firms piloting and/or testing with regards to secretary utilization?
 4. What are the biggest challenges and/or obstacles with implementing or utilizing these pilot programs?
 5. What benefits (if any) have been noted from using these new models?
 6. If your firm has not implemented any new models, do you anticipate creating and implementing new models in the next 3-5 years, and if not, why?
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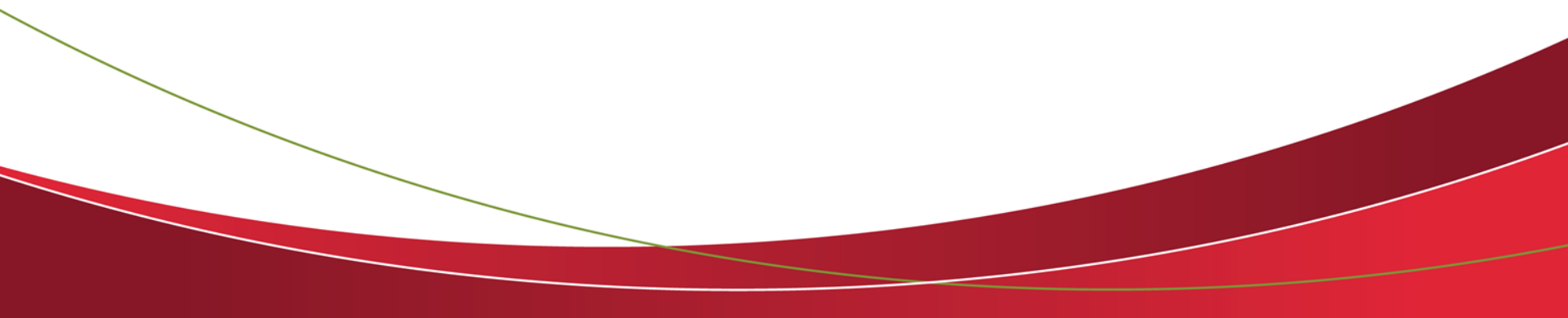
WHAT DOES THE LEGAL SECRETARY OF THE FUTURE (LSF) LOOK LIKE?

- The LSF will most likely have his/her paralegal certificate
 - In addition, the LSF will also have a Bachelors Degree
 - The LSF will likely only commit to your position for 2-5 years before moving on to something else
 - The LSF will have exceptional technology skills and adaptability, but may require some training on follow through and being proactive
 - The LSF will be constantly evolving as the technology continues to evolve
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HOW CAN YOU IDENTIFY YOUR LSF TODAY?

- Create strategic alliances with your local Universities
 - If you want someone who will be with your firm more than two years, look for someone with a Bachelors Degree and a solid GPA, but not a 4.0 (Most often, the applicants with a 4.0 will likely be heading to law school or graduate school after only a year or two)
 - Look to small firms for finding your perfect LSF who will be adaptable and able to take initiative
 - Leverage your social network using LinkedIn
 - REFERRALS! Offer incentives for great referrals
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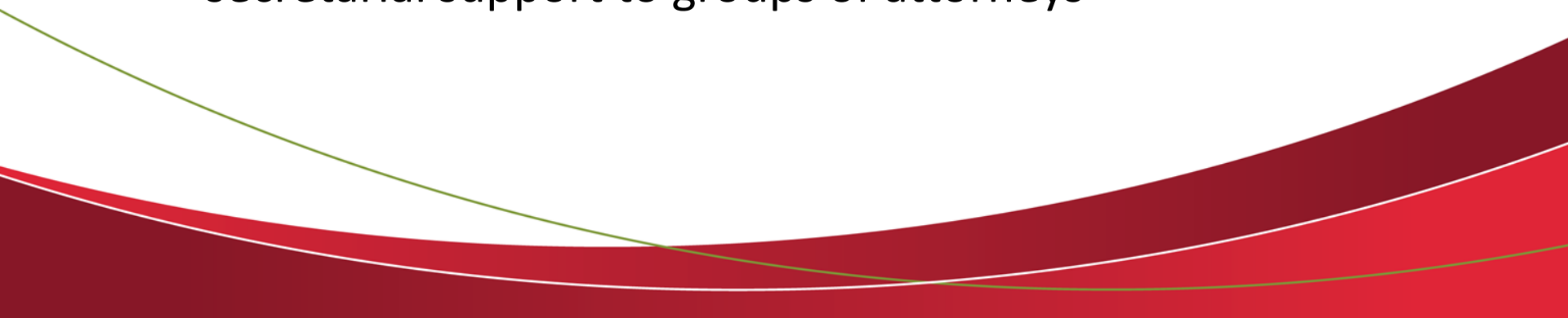
WHAT TO DO WITH AN LSF CANDIDATE ONCE YOU HAVE FOUND THEM

- Test for hard skills such as Excel, Word, PowerPoint etc., but do not expect a typing speed above 50 wpm
 - Find out what motivates your potential LSF (i.e. money, title, acknowledgment, growth etc.)
 - Before you hire them, ask yourself if you/your firm can give them what they want long term? If not, are you willing to lose them?
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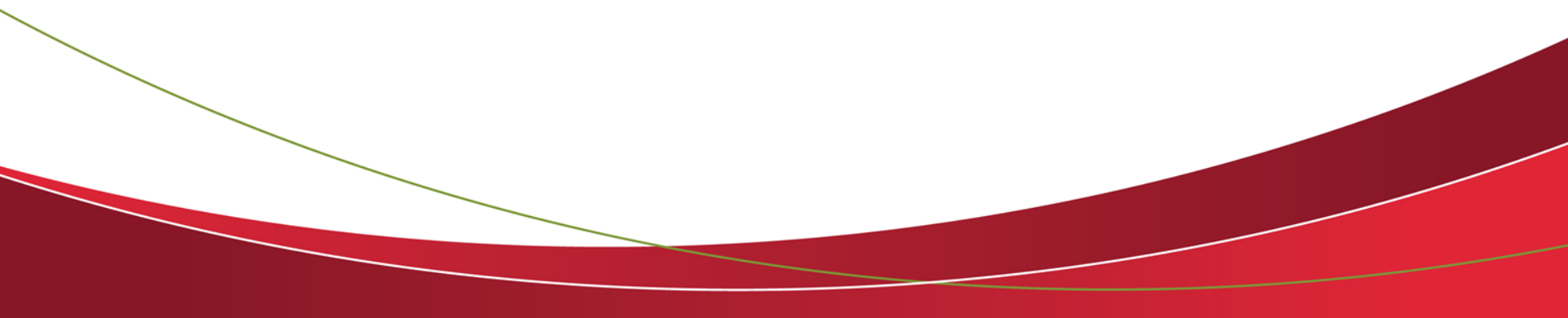
EMERALD, RUBY, SAPPHIRE, PEARL

- Do a skills evaluation to find out if they are more of a Ruby, Emerald, Sapphire or Pearl.
- Find out more on these personalities at:
<http://madibathompson.com/1131/i-dont-understand-you-knowing-the-4-personalities-is-critical/>
- Why does their personality matter?
- What do you need to know when giving an Emerald, Ruby, Sapphire or Pearl an offer?
- What do you need to know to keep an Emerald, Ruby, Sapphire or Pearl happy?
- For similar personality profiling check out DiSC:
<http://www.thediscpersonalitytest.com/>


EXAMPLES OF NEW MODELS TO TRY WITH YOUR LSF

- Assigning first and/or second year associates to “secretary work-source centers”
 - Having teams of attorneys who are assigned to teams of secretaries based on practice group
 - Moving to a model with one lead secretary for a group of attorneys along with several supporting secretaries who are assigned to a group of attorneys
 - Utilizing “resource centers” in other states that provide secretarial support to groups of attorneys
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PROS AND CONS OF VARIOUS LSF MODELS

- Virtual Legal Secretary
 - Hybrid Legal Secretary/Paralegal
 - Pod Legal Secretarial Team
 - Practice Group Legal Secretarial Team
 - Lead Secretary + Junior Legal Secretary
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OVERCOMING COMMON OBSTACLES WHEN IMPLEMENTING NEW MODELS

- Finding and retaining the right talent
 - Once you find your LSF, keeping them challenged and engaged
 - Burnout and morale issues
 - Creating and maintaining strong communication and team work for fostering a collaborative environment
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ONCE YOU HIRE YOUR LSF - KEEP THEM!

- There are three main motivators that will help you keep your LSF happy. In some cases they may need a combination of all three, while other may just need one or two of the three:
 1. Money
 2. Acknowledgement/Appreciation
 3. Growth/Responsibility/Challenge

*To the Traditional Legal Secretary *stability* would have been on this list, but no longer makes the Top 3 for an LSF

CREATING YOUR INDISPENSABLE LSF TEAM

What does **indispensable** mean?


Merriam-Webster's definition:

- Not subject to being set aside or neglected <an *indispensable* obligation>
- Absolutely necessary : essential <an *indispensable* member of the staff>

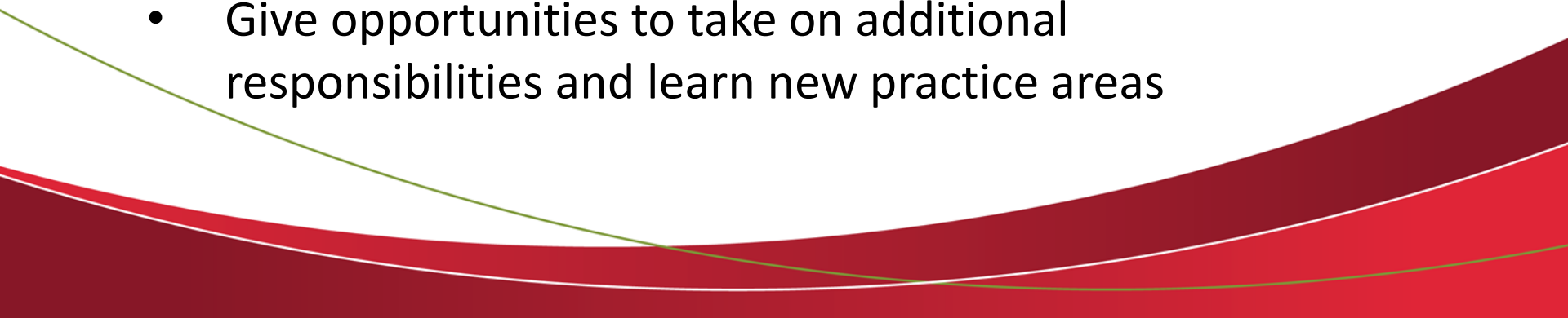
My definition:

- Proving one's worth by increasing the productivity, efficiency and/or performance of the firm, and the firm's clients
- How can we generate an indispensable LSF Team?


WHAT DOES AN INDISPENSABLE LSF LOOK LIKE?

- Exceptional technical skills
 - Willingness and ability to learn any and all practice areas
 - Adaptable
 - Helpful
 - Great attitude
 - Proactive
 - Always learning
 - Trustworthy
 - Reliable
 - A good listener
 - Someone with integrity
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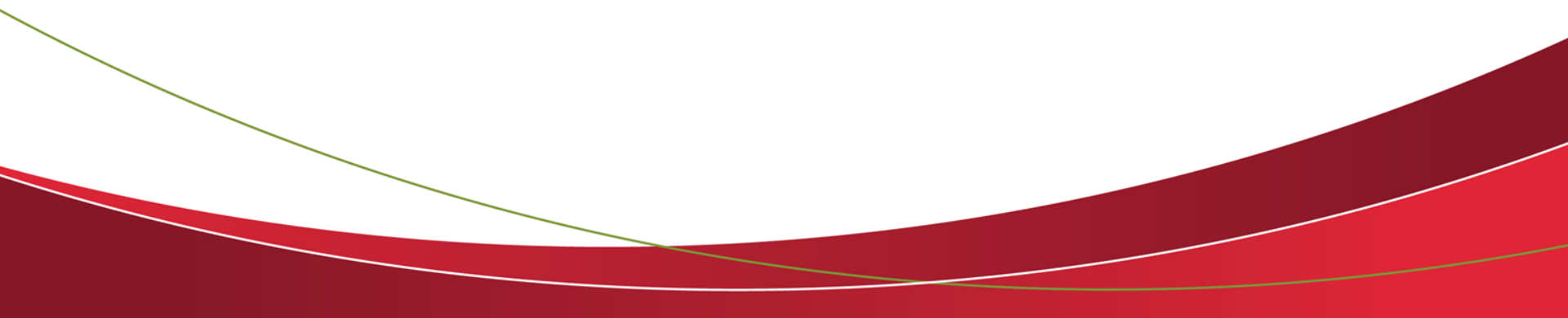
CREATING THE “INDISPENSABLE” ATTITUDE

- Foster an environment that thrives on communication and feedback
 - Create opportunities for acknowledgement and advancement
 - Be clear and intentional with respect to any expectations
 - Offer regular technical and professional development training and opportunities
 - Reward accountability, reliability and people who are helpful
 - Give opportunities to take on additional responsibilities and learn new practice areas
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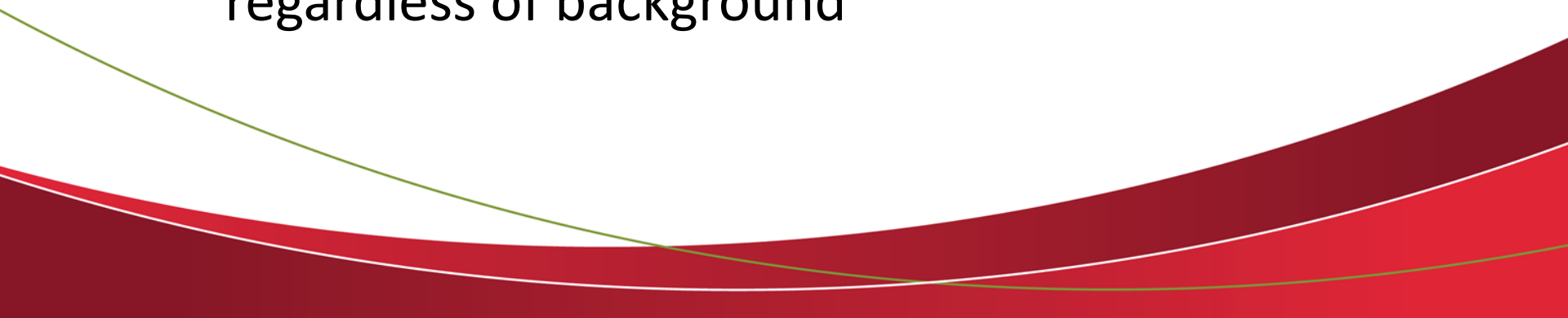
WHAT IS THE “ACCIDENTAL ADVERSARIAL RELATIONSHIP”?

- The #1 complaint I hear from legal secretaries is “My attorney is a challenge...”
 - Why is it that secretaries and attorneys often butt heads and can cost a firm tens of thousands, if not hundreds of thousands of dollars in recruitment and retention?
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THE ANSWER

- A simple misunderstanding
 - If party “A” does not understand where party “B” is coming from, you are going to naturally have unfulfilled expectations, frustrations and resentments
 - It is as though one person is speaking “orange” and another is speaking “apple”
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THE BASICS TO BETTER UNDERSTANDING

- Men and women are designed differently
 - That said, it is important to understand that a woman who is driven and type “A” can often exhibit masculine traits and vice versa
 - What we are going to work on is teaching an “Apple” to speak “Orange” so that they are using the same language to communicate regardless of background
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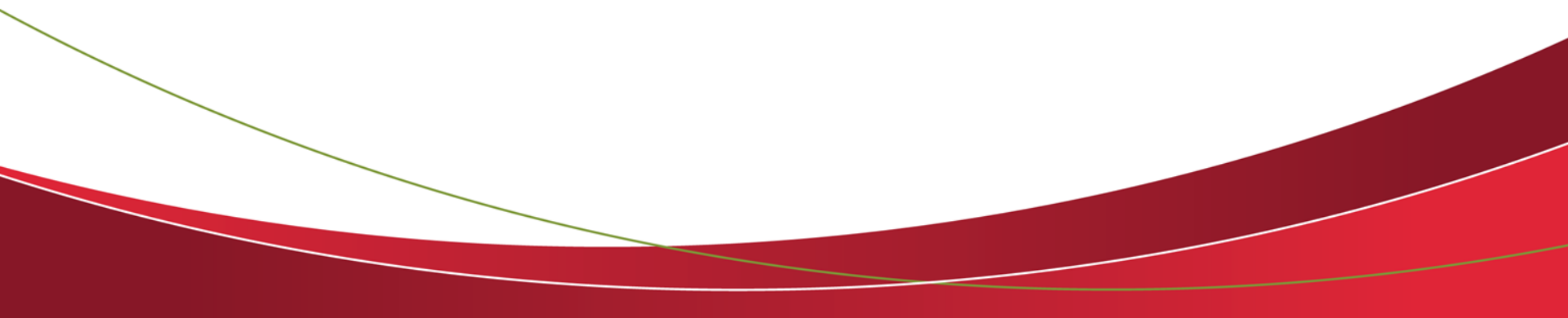
SOME OF THE BASICS

- Oranges are single focused
 - A result must be worth their time
 - Will screen out the irrelevant
 - Will mute background noise
- Oranges need transition time
 - Rituals must be completed
 - No “talk time” unless worth it

KEYS TO EFFECTIVE COMMUNICATION

- The first key to effective communication with an Orange is to begin with, “I am sorry to interrupt...”
- Followed by: “Is now a good time?”
- Once one has established it is a good time to talk with an Orange and/or requested a future time to speak, a good ask is necessary.
- Examples would include: “I need your help,” “I would be happy if...”, “You will be my hero if you can help me with X.”

KEY WORDS TO HELP FACILITATE EFFECTIVE COMMUNICATION

- “Help”
 - “Hero”
 - “Need”
 - “Save”
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ADDITIONAL RESOURCES

- A great resource for a better understanding on how men and women are designed is:

www.understandmen.com

- Also, Alison Armstrong's book, Keys to the Kingdom, is another great resource
- Landmark Education is also a wonderful resource for fostering better interpersonal skills and stronger, more effective communication:

<https://landmarkworldwide.com/>

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YOUR OPINION MATTERS!

Please take a moment now to
evaluate this session.

Thank You!

