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Skills Assessments in Law Firms

A Firm's Case Study and a Vendor's Best Practices

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Why Skills Assessments in Law Firms now?

CHANGE **PROGRESS**



"Failure is not fatal, but failure to change might be."
-Wooden, John.

What is a Skills Assessment?



A Skills assessment is:

- An important source of information about what development activities individuals should engage in.
- It can help individuals understand where they excel and where they might need additional focus.
- Provide them with a development plan that allows them to acquire those skills, and set the stage for their being rewarded when they develop new needed skills.
- Evaluating the skills of individuals and giving them advice on their development, then, should be a critical part of every appraisal process.

Why are YOU planning a Skills Assessment?




Our Philosophy



- People are motivated to learn when they see it having a positive impact on their life
- The most powerful learning happens at the moment the knowledge is needed
- Technology is a powerful tool when it doesn't impede progress
- The true value of learning is measured by the impact it has on the individual

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Our Story



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Phase I: Understand the Environment

- Interviewed workforce to understand what employees wanted more of
- Experienced work from the employee's perspective
- Analyzed help desk data to identify trends
- Collaborated with employees to create a basic framework of competencies needed to perform at a high level

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Phase II: Design the Assessment

PathFinder
Assess → Learn → Apply

IP Secretary Skills- Self-Assessment

1. Please indicate your proficiency level in the following skills.
If you have no knowledge of a skill, skip it and go on to the next one.

CPI Docketing Database

- Docket PFD Correspondence according to procedures, including printing docket sheets for file
- Off-Docket and update old data as necessary
- Add pertinent information and new cases
- Pay penalties and maintenance fees utilizing CARS
- Search designated fields to identify cases
- Run docket reports by due date/client/attorney

Development Stage		
Learning	Competency	Mastery
Seeks to gain knowledge and awareness of the skill through eLearning, classroom instruction, and/or on-the-job training.	Possesses sufficient knowledge and experience to complete the task without guidance.	Possesses extensive experience, applies best practices and can support the learning of others.


Phase III: Analyze the Results

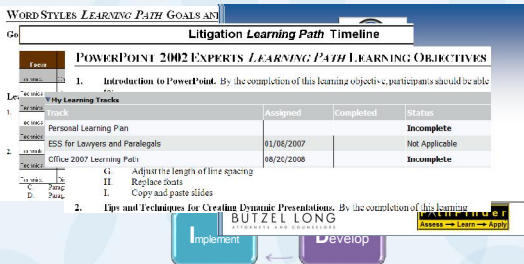


- Refined Competencies
- Created Job Descriptions
- Identified Skill Gaps
- Appointed Subject Matter Experts



Phase IV: Create Training Programs







The screenshot shows a 'Litigation Learning Path Timeline' with two main sections: 'POWERPOINT 2002 EXPERTS' and 'BUTZEL LONG'. The first section includes an objective for 'Introduction to PowerPoint' and a table of learning tracks. The second section includes an objective for 'Tips and Techniques for Creating Dynamic Presentations'.

Learning Tracks	Assigned	Completed	Status
Personal Learning Plan			Incomplete
BS for Lawyers and Paralegals	01/06/2007		Not Applicable
Office 2007 Learning Path	08/20/2008		Incomplete

Results



- A realigned workforce capable of meeting the ever changing needs of the client
 - Significant increase in efficiency based on shift from jack-of-all-trades approach to specialist roles
 - Jobs that required extensive technology were filled by those most capable
 - Training related Help Desk Calls dropped immediately from 25% to around 5%
 - Training went from being corrective to being transformative




Why Do Firms Care about Skills Assessment?

- Cost of a bad hire can approach 100,000 (\$ or £)
- Difficult to maintain skill level of non-legal staff
- Fast pace...no time to go to training
- Associates are doing more and more of their own work
- Increasing lawyer to secretary ratios
- Secretarial roles have changed dramatically with increases in technology



Where does Skills Assessment Fit in your Firm?

- Who and when?
- Pre-Hire – qualify candidates
- Post-Hire – prep for new hire orientation
- 30, 60, 90 days after initial training
- Pre- and post- class exercises
- Self assessment, eLearning
- Firm wide skills assessment of existing staff






Establish a Team



- Representatives from key groups
- HR
- Technology Committee
- Secretaries/legal assistants
- Training
- Professional development staff


Set Clear Goals i/ra 2011
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- Why do you want to do a skills assessment?
 - Determine training plans?
 - Include in personnel evaluation?
 - Determine assignments?
 - Encourage team work/collaboration?
 - Reduce support calls?
- How will you determine success?

Decision Factors i/ra 2011
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- Who will be taking the assessment?
- Where will it be taken?
- Should assessment be timed?
- Who will be administering?
- How is the assessment graded? Automatically or "by hand"?
- How will results be communicated?



Who is your Audience? i/ra 2011
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- Candidates for hire, new hires, existing secretaries, new attorneys, support desk
- Answer will have impact on functionality needed
 - just a score – pre-hire
 - What did I do wrong – existing employees
 - How many versions of assessment required?
 - Reporting requirements




Why Assess Existing Staff?


- Respond to needs of new computer savvy associates
- Create targeted training plans
 - Word experts
 - Secretaries
 - New associates
- Measure training effectiveness
- Assist in staff assignments
- Locate the real trouble spots



What tasks do you want them to be able to perform?




- How do you determine core competencies?
- Lawyer needs must be considered
- Observation of people at work
- Consult with others who provide support
- Measure different ways of accomplishing same task, reward efficiency




Challenges

- Need for customization for firm methods/tools
- Is automated tool legal-centric
 - Everyday legal practices often considered "advanced" outside of legal
- Difficult to grade consistently
 - Concern for objectivity with manual grading
- Time-consuming to grade
- Difficult to sell internally




What to customize?



- Use of firm template
- Use of firm standard styles
- Use of firm best practices
 - Margins, fonts, header/footer content, page numbering
- Incorporate specific document types (CA pleading)
- Methods for creating signature blocks
- Methods for creating captions

Implementation Examples



- Incorporate into new hire training
 - Pre hire for score
 - Post hire to evaluate areas for focused training
 - 30/60/90 days after hire to determine training effectiveness and determine future needs
- Incorporate into training program - Post class exercise, with menu of classes to check the exercise
- Part of firm wide university style training program including assessment tied to performance evaluation

Handle the Emotion



- Make it a game – musical chairs with projects, encourages team work, communication
- Provide incentives – doesn't have to be monetary
- Market the benefits early and often
- Make the assessment as real world as possible