Office Leadership and Management 101

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The Importance of Leadership First

While my role is truly defined as traditional management, I truly believe it is my leadership skills that guide me. One must understand leadership and all of its implications and importance to truly manage anything … a law office, life, your dog, your family, etc. I cannot emphasize enough the importance of understanding leadership and constantly improving your own leadership style to better manage your team. So, before we manage a thing, we must be a true leader first and foremost.

I believe leadership entails understanding the importance of how to motivate others, being at the service of the team (and not the other way around), guiding and helping the team throughout a process to a goal, be ***THE*** team builder in every situation to ensure everyone's strengths are utilized, and using a team approach for all goals.

Recruitment Strategies

When recruiting, one must think about the various options available in their surrounding area. My involvement in local, state, and national organizations has been very beneficial to me when I am looking to add to our legal team. Job banks are a huge part of my legal organizations from PACO to NFPA to the OSBA. These organizations allow me to post an ad to my specific role. Additionally, I have used online options from LinkedIn to Indeed for posting any open positions within our office. Networking is key to my role in recruiting as well. As much as those looking for a new job need to network, those looking to hire need to do the same.

Orientation and Onboarding

In the orientation process, the focus with the new hire in their role in the firm and their specific department i.e., MedMal, General Lit, BWC, etc. Orientation is a one-time event to cover the big picture of the firm and what practice areas they cover, etc. before the actual training process starts. Schedule meetings with those who handle mail processing in your firm, copy job center members, HR, and billing department members as the new hire will have contact with them in the new role. While an orientation agenda can be boiled down to a checklist, onboarding is a more strategic plan.

In the onboarding process, the focus with the new hire is their role in the specific practice area they will be working in. Onboarding is the individualized training plan for the on the job tasks the new paralegal will be doing. Schedule meetings with staff in the office so the new hire can get a sense of how they manage workloads and specific tasks and definitely, for example, schedule meetings with the attorneys the new paralegal will be working with. Have a training checklist that covers each and every responsibility the new hire will have (this should also match the duties listed in our job description) and create a training schedule to ensure all areas are covered and understood with an end of week 1 touch base meeting and the at the end of weeks 2, 3, 4, etc. as needed.

Performance Management

In our office, we utilize 90-day evaluations, annual evaluations, and employee action forms for corrective action (not punishment). Evaluations need to be real, not a song and dance routine to check a box. Ultimately, meaningful evaluations should be a training tool. Don't hold issues until a 90 day or annual evaluation. Address issues head on. Do not dwell or stockpile. Have a performance management plan and ensure the team and new hire knows how the process works.

Promotion

In every company, you will have those that are status quo employees who want to do the job the applied for, do the job they like, do the tasks they like, etc. You will also have climbers which are those who may be hired in as a paralegal but want more like me for example. I was hired as a traditional paralegal. And then I first created my Leader Paralegal & Marketing Specialist role and later created my current one of Administrative & Paralegal Support Director. New title leads to new role which includes new or additional tasks or perhaps the recognition of what you were already doing.

Utilizing my job title creation past, I have done the same with our Administrative Assistant who was promoted to Legal Support Specialist because she did way more from the original AA role and exceled at it so a new job title to reflect those duties and then some was the correct action.

Recognition

"It's the little things" … so short, sweet, and to the point and yet so very true. Something so simple can move the needle so much for someone and it does not take a full-blown, over-the-top recognition program to do the trick. It starts with "thank you" and increases from there. People will repeat rewarded behaviors so therefore the power of recognition is a ripple effect that you can watch blossom into loyalty, engagement, and passion. Examples of things to recognize would be your paralegal obtaining one of the many national and/or state certification options or your paralegal's extra activities outside the office with a national, state, or local paralegal association. Celebrate the extras in the best way suited for your particular paralegal.

Financial Management

I utilize the yearly Robert Half Legal Salary Guide for various positions within our office including paralegals and administrative staff. It is a free online resource that breaks out various legal positions across the U.S. and Canada from attorneys to office clerks. I also find it helpful to monitor job posts with salary ranges included through online platforms such as Indeed or LinkedIn. Be sure you are reviewing the budget quarterly regarding salaries of staff and increasing accordingly with performance, cost of living, etc. Lastly, I also review billable hour memos that come out monthly in our office. This helps me gauge where my billable employees are in the fiscal year.

Time Management

In many defense-oriented offices such as ours, we are paid based on billable hours that are tracked and billed to the insurance company who provides coverage to our doctor or nurse for example. Time sheets allow me to see what my paralegals and nurse paralegals are doing each day from administrative tasks to billable/case related tasks. This provides the paralegals and/or nurse paralegals with a source to show their efforts towards the billable requirement they have which directly impacts their salaries. I also use the time sheets in conjunction with our file lists and Trial calendar to monitor caseloads and the time needed to handle everything. Many projects and tasks take varying amounts of time so being proactive in the load and requests by managing time commitments is key for your team.

Team Relationships

A solid relationship provides a solid foundation and zone, but it also requires nurturing and reinforcement. The team approach is the only approach. Period. To foster our team environment, our administrative staff, paralegals, and nurse paralegals collaborate on many fun things such as firm 5k events, tailgate parties at the OSU games, our Holiday party, and charity work projects for our local food bank. I pride myself on having an open-door policy in which I will listen to hear, not just to respond. I also believe it is beneficial to handle issues as they arise not after tons of time has passed. If you respect and appreciate your team, they will respect and appreciate you.