



# Secretarial Teams: A Winning Solution

By Jo Smith

Are these typical scenarios at your office?

**Your Managing Partner and Board of Directors are urging you to increase secretarial ratios in order to reduce expenses in an increasingly competitive legal market. Your attorneys are wary of any change and get upset if the secretary they know and rely on isn't available at all times. Your secretaries are working to keep their timekeepers happy and may or may not be aware of pressures to change. Is that about right?**

## **The Benefits**

The clearest reason to create secretarial teams is to reduce expenses by increasing secretarial ratios. Other benefits might not be so obvious, however. Secretarial teams can provide high-quality, seamless coverage better than single secretaries or large pools of secretaries. An attorney who relies on a single secretary must do without or bring in a temporary or a floater when his or her secretary is unavailable. Doing without is a poor option if the secretary's absence is more than brief or if an urgent need arises. A temporary or a floater might not know the attorney's practice area and certainly won't know his or her working preferences. By contrast, a team of three to five secretaries assigned to serve a group of designated attorneys can learn how to work effectively with each attorney they're assigned to support. The attorneys benefit by having not one, but three

to five secretaries who know them, their practices and their habits well. The secretaries benefit because they have knowledgeable back-up when their workload is temporarily overloaded or if they become ill. Team back-up makes it easier for them to plan vacation time, without worrying about their attorney's coverage in their absence or a mountain of work when they return. Team secretaries commonly enjoy more learning opportunities and greater variety in their work. Furthermore, teamwork can lead to better problem-solving and increased camaraderie and morale.

Summarizing the reasons for creating secretarial teams, the firm benefits from reduced expenses, not just as a result of higher secretarial ratios, but also because of more efficient support service, greater satisfaction, and increased retention. The lawyers benefit from better and more reliable coverage which increases

their assurance in their secretarial support and reduces their anxiety about absences, unexpected or otherwise. The secretaries benefit from dependable back-up, improved morale and, in most cases, more variety and learning opportunities.

### The Blueprint

Secretarial teams are still relatively new to law firms, so firms are continuing to learn and share best practices. What follows is by no means the only blueprint, but it is a blueprint that works, addressing the opportunities, challenges and tasks involved in creating secretarial teams.

### Planning

Size will affect your planning. At first glance, it might appear that only large firms can benefit from secretarial teams, but even small firms with a handful of secretaries and support people can benefit from creating a single support team that merges their talent, cross-trains, and collaborates to

provide efficient and effective coverage to all timekeepers.

If your firm is larger, creating secretarial teams will require making

ing an office assistant to support the work of the secretaries. This allows the secretaries to delegate clerical work and focus on work that requires

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several choices. How will you select attorneys? You might select them by practice area or you might select attorneys whose practices complement each other for other reasons, including work-style, practice seasonality, and/or support demands. Considerations when selecting secretaries might include knowledge, skill level, style and workload capacity. Skill mix can be an additional consideration. For example, you might want each team to have expertise in relationship management, document production, and/or advanced technology.

Complete your teams by includ-

ing higher level secretarial skills. It also provides a training ground for office assistants who aspire to higher-level firm positions.

### Preparing

A rolling launch is recommended. Success with your first team will set the stage for success as you launch teams throughout the firm. When you've selected your first team, talk independently with each team lawyer. Begin by talking about their coverage concerns and the potential risk of relying on a single favored secretary. Then focus on the benefits of a secretarial team to them personally,



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explaining that they'll no longer be wholly dependent on a single secretary who is sometimes unavailable due to illness, family needs or vacation, but will receive seamless, high-quality coverage from three to five secretaries who will know them and

the advantages of having knowledgeable back-up, i.e. they'll know their timekeepers' needs will be met if they're unexpectedly ill or take vacation time. They won't return to work that wasn't done to their timekeepers' satisfaction or to a mountain of

most of them), identify the skills your secretaries and office assistants will need to function as a team. Experienced secretaries will have the skills to independently support one or more attorneys, but might not know how to work as members of a team. Office assistants are likely junior employees and might need more clerical or technical training, in addition to team training. Begin providing technical skills training, on an as-needed basis.

Provide your secretarial team with training that includes teambuilding, trust, communications, delegation, meeting how-to's, accountability, and any other team skills you identify as critical or beneficial. An external consultant can combine these topics in a number of ways, using one or more tools to impart the skills necessary to work as a team. These trainings should be delivered in two or more small bites of no more than two-hours each, because it will be hard on

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their practices well. Probe for any concerns they have and do your best to address and alleviate those objections. Incorporate their input and suggestions into the planning process. Next, talk with your secretaries, again one at a time. Anticipate, if you can, which secretary might be the champion of the team concept and begin with him or her, then proceed to the others. Begin by discussing

work that wasn't done at all. Then talk about the potential satisfaction of working on a team learning from each other, working with other attorneys, variety, team problem-solving and camaraderie. Tease out and address their objections and incorporate their suggestions into the planning process.

When you have the buy-in of your first-team attorneys and secretaries (or

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the attorneys to have their secretaries unavailable for more than two hours at one time and short trainings will improve learning and retention.

The trainings should begin shortly before or coincide with your launch, so your team can learn and implement

and confirm availability and workload capacity. They'll communicate any absences to affected attorneys, along with team coverage, "Tom, your secretary Cynthia will be out tomorrow. Bruce can take care of any assignments you have and our office

your launch to discuss what's working, what challenges have arisen, and what can be improved. The final step in the launch is to hand responsibility over to the team to schedule and lead weekly meetings, coordinate coverage, discuss and resolve issues, share best practices and strive to continuously learn and improve.

Your first team will provide you with anecdotes and champions to promote the launch of additional teams. After the launch, each team will become increasingly self-sufficient, but should be monitored periodically for ongoing effectiveness and opportunities for improvement. Don't forget to make your attorneys and your teams part of the ongoing evaluation and improvement process.

## **This is the day secretaries will begin working together to coordinate and confirm availability and workload capacity.**

simultaneously. It's critical that trainings are interactive, allowing your secretaries and office assistants the opportunity to envision and plan their own successful team, following basic guidelines defined by your firm.

### **Launching**

Announce to your first team—attorneys, secretaries and office assistant alike—the day their team collaboration is to begin. This is the day secretaries will begin working together to coor-

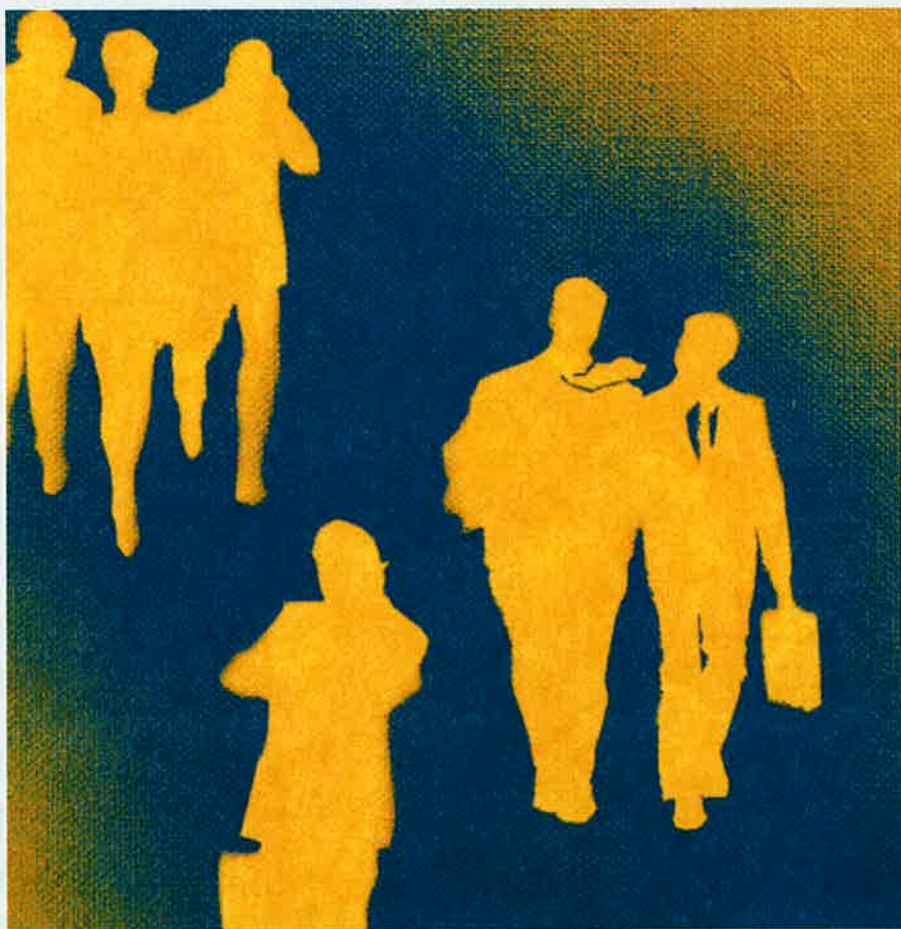
assistant, Amanda, will check Cynthia's voice mail, email, and desk to be sure nothing is missed in her absence. Feel free to see any of us for any help you need while Cynthia's away." Your team circumstances might call for a variation of this message, but the key is to let the attorney know in advance who he or she can rely on for work and how the missing secretary's "desk" will be covered.

Continue facilitated, interactive meetings during the early weeks of

### **Success**

Attorneys greet you with a smile and say, "This new secretarial team is working great. Everything ran smoothly when Sally was out sick last week!" Your Managing Partner is happy because the same number of secretaries are supporting more attorneys a promise of higher profit margins to follow. Furthermore, attorneys aren't complaining to him or her about support. Your secretaries are happier and more relaxed knowing they're working with a small team they can trust to do good work and support each other. And your office assistants are learning new skills, poised to take on more responsibility when the time is right. You've effectively implemented secretarial teams and made a significant contribution to the productivity, profitability, and morale of your firm. Enjoy the success!

**LMN**



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