Legal Administrative Assistant Teaming Models:
The Next Level and How to Get There

Meet Your Presenters

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Panel Objectives

• Who are we and what are we doing?
  Types of team structures and how we are implementing teams
• How do you sell it?
  Benefits of team structures and why your partners should want it
• Why else is this important?
  Teams build replacement talent for a retiring workforce
• What is the next level?
  Future trends in teaming models

Where we have been...
To where we are going...
Case Study No. 1: Why Change?

• Identified lack of modern efficiency
  ✓ Misused HR time on locating backup support
  ✓ Expected attrition
  ✓ Inability to attract “secretaries” among the new generation of employees
  ✓ Certain tasks assigned ineffectively (calendaring, mail processing)
  ✓ Inconsistent support for associates

Competencies and Elevated Positions

• Developed Task Force of various practice groups, office location, skill levels and included cynics
• Conducted survey: hours consumed by clerical tasks
• Defined core competencies required of legal support staff
  ✓ Mandatory testing and training
Competencies and Elevated Positions, continued

• Refreshed title and job descriptions to Legal Administrative Assistant (LAA)

• Created Legal Support Assistant (LSA) position
  ✓ Rotates/trains with Team Coordinators for 6-9 months

• Identified strong leaders among peers to serve as Team Coordinators

• Created centralized Docketing and repurposed clerical staff

Team Implementation – Phase 1

• Created Backup Legal Support Teams by floor/proximity
  ✓ Teams share workload
  ✓ Shared team inbox for mail/office services

• Created “Assignments” email group for each team
  ✓ When LAA is out of office, attorneys/paralegals email assignments to the teams
  ✓ First available LAA picks up assignment (15-minute rule)
  ✓ HR included as member of each team email to monitor team activity
Team Implementation, continued

- Team Coordinator monitors workflow
  - Bi-monthly meetings with Team Coordinators to further discussions about efficiencies, innovative approaches to work shift, etc.
- Paralegals reassigned from direct LAA to team structure
- Associates utilize teams regularly
- LAAs are evaluated on participation on team
Next Level

• Promote more utilization by the partners
• Develop formal approach to tracking assignments and team participation
• Cross-Training
• Currently piloting hybrid Paralegal/LAA role
• Encourage remote support among offices
• Phase 2 – Shift associates into team structure with no direct LAA assignment (1 year)
• Phase 3 – Shift partners into team structure with no direct LAA assignment (2 years)
Case Study No. 2 - The Pilot Team

• Identified the need:
  ✓ Busy litigation practice with needs very different from years past
  ✓ “Partner first” mentality of work prioritization inconsistent with evolution of the practice
  ✓ Little to no incentive among staff members to innovate work practices
  ✓ Retiring workforce; next generation demanding training and promotability

• Found the opportunity:
  ✓ Defined core competencies required of staff
  ✓ Offered employees resistant to change an opportunity to train or move on (through strictly voluntary early retirement program)
  ✓ Identified clear leader among peers

• Identified team participants (attorneys and staff):
  ✓ As long-term admins announced retirement, worked with junior partners interested in innovation to identify attorney team members
  ✓ Hired 2 junior admin assistants at different levels of experience, with significant salary savings
  ✓ Assigned various levels of attorneys to the team, including all of those originally assigned to the team leader
  ✓ Ensured the team leader had a say in assignment logistics and attorney communication structure

• Success! 17 attorneys: 3 admins
  7 partners (4 of them senior- 1 major rainmaker)
  10 associates (1st through 7th years, and responsible for court filings)
Next Level

• Careful not to overload team (b/c there is only one); attorneys not in team need to understand this isn’t their backup plan

• Frequent communication about workload to keep team engaged and responsive; identify resources to assist whenever necessary (infrequent, but significant)

• Identify opportunities for the next team, within the practice group and outside:
  ✓ Within- attorneys already asking (including our original naysayers)
  ✓ Outside- presents greater challenges
Case Study No. 3:

• 16 offices world wide
• 7 California Offices
• 92 year old Firm
• High number of retirements and long tenured staff
• No real succession plan
• Support needs of new associates are different from retiring partners
• New offices and small offices in need of support
• Established office too much support

San Francisco Office Pilot

2016
• 28 Secretaries - 12 eligible for retirement

2019
• 18 Secretaries – 8 eligible for retirement - 3 Practice Assistants
San Francisco Office Pilot

Practice Assistant
• Paid at 60% of Legal Secretary
• Recent graduate or administrative employee with degree
• Excellent technical skills
• Extensive training and shadowing
Next Level

- Firm-wide administrative support options to further increase local office ratios and have around the clock assistance
- Assistants supporting attorneys in practice groups/industry teams in multiple offices
- More hoteling of attorneys
- More associates working remotely
- Smaller offices are supported remotely
- Rollout to rest of the firm
Case Study No. 4: Well-Established Team Structure

- 19 Offices, 700 Attorneys Firmwide
- The case for teaming:
  - Leadership requested a change
    - Over-staffed
    - Cost-savings
  - Associates doing more of their own work
  - LAA tasks very different today compared to 10 years ago
  - More appealing job responsibilities for next generation staff members
  - Inconsistent support for Associates as compared to Partners
  - Improved skillsets of LAAs (more technical)

Team Implementation:
- Extensive Research & Planning
- Staff Reduction – Voluntary Incentive Package vs. Reduction in Force
- Phased approach to restructuring
  - Pilot Group – Started with group of Summer Associates (2014)
  - Voluntary Incentive Package #1 (December, 2014)
  - Phase I – All Associates (January, 2015)
  - Phase II – All other Non-Partner Attorneys and Paralegals (March, 2015)
  - Voluntary Incentive Package #2 and Reduction in Force (March, 2016)
  - Phase III – All Partners (April, 2016)
- Allowed team members to volunteer for Legal Support Teams in Phases I and II
- Teams are built around practice area and team members were chosen based on experience in the appropriate areas of practice
**Team Implementation:**

- Team of 4-6 legal secretaries support 16-42 attorneys and paralegals. Ratios vary by team and area of practice.
- Partners retain point of contact on team for client interaction, billing and mail/CLE responsibilities.
- Team shares workload, coordinates coverage for absences and provides support during normal business hours.
- Each team has a Team Lead to monitor the workload and to ensure projects are being completed timely. Team Lead receives monthly stipend for this responsibility.
- Electronic log used to track assignments to help team members stay organized and prioritize projects.

**Teams set up in specifically designated work spaces**

- Workspace intentionally smaller to increase collaboration and encourage paperless initiatives.
- Smaller footprint also added to cost-savings during buildout.
Next Level

• Improved workflow system to collect data to make more informed decisions about admin support needs going forward
• Develop Training/Certification Program to ensure team members have appropriate skillsets going forward
• Firm-wide admin support option to further increase local office ratios and expand support across all offices
  • More Associates working remotely
  • Firm-wide team located in lower cost market

Benefits of the Team Structure:
The Business Case

• Cross-trained support provides continuity of coverage
• Teaming allows for greater expertise in a wider variety of areas (i.e., each team member specializes in a particular skill set, but is proficient in all)
• Significant salary savings in staffing teams at a variety of levels of experience
• Promotability within team structure provides career path for entry-level employees
• Team members better understand that they work for the firm, not a particular partner inclined to hold the employee to a lesser standard
• Performance deficiencies and areas for improvement are quickly identified
• “Partner first” mentality is minimalized or eliminated with no disruption in service--significant in practices where associates are responsible for court filings and similar deadline-driven work product
Communicating the Plan

• Find the allies within leadership that recognize benefits; look for those who are interested in two things:
  (a) increased productivity and efficiency; and
  (b) a close look at the bottom line
• Successful implementation requires support from Executive Committee (governing body of the Firm)
  (a) put EC member in pilot team

Developing High Performing Teams

• Standardization of work product throughout practice groups
• Geography: Team needs to sit together for maximum efficiency
• Identify areas of expertise for each team member and support learning initiatives
• Provide opportunities for best practices to be shared among support teams
• Create growth opportunities within the team structure
• Forming-Storming-Norming-Performing
Identifying Replacement Talent

• Talented and experienced LAAs are no longer in the job market in significant numbers

• Those entering the workforce don’t want to be “secretaries;” looking for opportunities for growth and professional development throughout their career; they demand to see the path from the outset of their employment

• Multiple team members allows for search of different experience levels and different specializations, while still meeting the overall needs of the attorneys

Identifying Replacement Talent, cont.

• Get creative: build summer internship program for recent college grads (or those soon to graduate) with a tour through various practice groups

• Hire into the most junior roles of the team and create career path—some will phase out in 2 years (plan for it; less financial investment), others will become invested in their practice groups and the firm

• Assess skill sets of existing employees- requirements of LAA roles are very different from the past- may already have talented resources to contribute to the team
Next Level: Teams of the Future

Current trends:
- Cross-functional or hybrid teams (teams contain LAAs, paralegals, litigation support professionals, etc.)
- Virtual resource centers: administrative support supplied from a remote location, generally outside of major metropolitan areas (where expenses are far greater)
- Virtual workforce
- Lower level administrative needs in firm-wide support team who perform tasks such as time entry, data entry and other clerical work
- Remote attorneys relying on centralized support team

Someday all of our teams will work this well together...
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