

Transitioning from a Law Clerk to a Supervisory/Managerial Role

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WELCOME



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Introduction - My Story

Deciding it was time for change

**“the
BEST DECISION
I ever made”**



Introduction - My Story

... cont'd

- Finding the right fit
- Seeking out training resources to become a manager – you know the work, but you don't necessarily know how to manage
- Independent stand alone sessions available
- Join your local International Practice Management Association (“IPMA”) chapter to learn and grow as a manager and network with other managers in your field



Types of Managers

- **Billable Manager** – has a billable hour component to their target together with a non billable administrative component
- **Non-Billable Manager** – Often a Director of Law Clerks, supervising law clerks in various practice areas and office locations (i.e. Toronto, Vancouver, Montreal, Calgary). No Billable Targets.
- **In House Managers** – No Billable Target
- **Supervisors**- that distribute work flow but otherwise remain as a clerk with a billable target

Types of Managers

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- **External Hire** – Starting Fresh at a New Firm
- Coming into a new situation and having to establish credibility and new relationships with lawyers, staff
- Assess the systems in the department and try to find a fine line between updating and changing a few systems/practices without “upsetting the apple cart” and respect what is in place
- Assess the skill level of your clerks and support staff to ensure work is being assigned to the appropriate skill level



Internal or External Hires

- **Internal Hire** – staying at your current firm and being promoted from within
- No need to assess skill level of clerks/staff as you already know this from working with them
- You already know the systems in place
- You have already established relationships with lawyers and staff within the firm
- You already have credibility with the lawyers and HR as they would not have promoted you otherwise

Internal or External Hires

... cont'd

- Relationships with other clerks and support staff within department may change
- Current clerks need to be on board with your promotion or you may face some challenges

Important Qualities of A Manager and Qualities of a Good Leader



Important Qualities of A Manager and Qualities of a Good Leader

... cont'd

- **Trusting**
- Lawyers need to know you are taking care of work and running the department
- Staff needs to know that you will go to bat for them

- **Responsible**
- Accepts responsibility for your own actions and those who are under your supervision
- Work with staff to correct a mistake when made



Important Qualities of A Manager and Qualities of a Good Leader

... cont'd



Important Qualities of A Manager and Qualities of a Good Leader

... cont'd

- **Respect**
- Be respectful of your staff and you will get respect in return
- Deal with problems as they come along
- Keep promises



Important Qualities of A Manager and Qualities of a Good Leader

...cont'd

- **Good Assessment Practices**
- Be able to evaluate your department and look long term as to how you want to see it
- Develop skills so that you have clerks at different skill sets to have a cohesive group that the firm can depend on
- Depending on your age, look forward to what your succession plan may be



Important Qualities of A Manager and Qualities of a Good Leader

...cont'd

- **Communicate**
- Try to make yourself always available and have an open door policy
- Communicate all procedure policy changes
- Be open to new ideas
- Have one on one meetings to keep up to date or hold short group meetings
- Deal with problems as they arise, not just on annual performance review



Important Qualities of A Manager and Qualities of a Good Leader

...cont'd

- **Patience and Mentoring**
- Remember you are a teacher
- If you don't know the answer, find it
- There is always something new to learn
- Encourage senior members of your group to mentor and teach the more junior members



Important Qualities of A Manager and Qualities of a Good Leader

...cont'd

- **Don't Be Overbearing**
- Try not to micromanage
- Best type of clerk is a clerk who does not need to be managed
- Hands on or Hands Off Manager – determine what type you are going to be so that your staff is aware



Important Qualities of A Manager and Qualities of a Good Leader

...cont'd

- **Humble and Appreciative**
- Always say please and thank you
- Show appreciation on a good job or when someone goes above and beyond
- Know that you will have “clock punchers” and those that “go above and beyond”



Important Qualities of A Manager and Qualities of a Good Leader

...cont'd

- **Lead By Example**
- Take your fair share of work and show you are willing to go above and beyond
- Be Flexible - Give and take with those under your supervision
- One set of rules doesn't necessarily apply to everyone
- Remember to keep confidential matters to yourself



Dealing With Conflict



Dealing With Conflict

... cont'd

- Where there is an angry lawyer involved based on the actions of yourself or a member of your staff
- Where your department or someone in your department is requested to do something that you do not feel is part of your responsibility/duties
- Be aware of delivery when criticizing or commenting on an issue with staff
- Meet privately and come up with a plan



Dealing With Conflict

... cont'd

- Document serious issues with your HR department
- Exit interview – use this as an opportunity to see if there is any room for change

Performance Evaluations

- Use as an opportunity to reflect on the past year
- Keep notes throughout the year for good and bad
- Give kudos for good situations and deal with negative issues
- Use this as an opportunity to check on morale and make yourself available for questions
- Allow the staff member to speak their mind
- Use this opportunity to set goals for the future

Work Delegation

- Try to keep a tab on everyone's availability and workload so that you can delegate to someone with capacity
- You will need to delegate to someone who has the skills
- If they don't have the skills, then you will need to oversee/train

Work Delegation

... cont'd

- Consider “work in progress” list to keep tabs on what is on your desk and encourage staff to do the same – this also helps when someone is going on vacation
- Make sure the lawyer knows who is taking on the work you are delegating
- Do not delegate day to day administrative tasks, tasks relating to running your department, performance reviews



Budgeting

- Required annually
- Some more complex – involving salaries, profit and anticipated expenses, overhead etc.
- Some more simplistic – involving conferences, continuing education expenses, membership dues, marketing, bonuses

Hiring/Recruitment



Hiring/Recruitment

... cont'd

- Assess needs of your department and work with HR department to implement job posting
- Use ILCO job posting section on website – one of the most popular search engines for clerks and legal support staff
- Vet resumes to narrow down candidates
- Meet with candidate and try to determine their skill level and fit with your department



Hiring/Recruitment

...cont'd

- Develop a skills checklist to determine skill level of candidate
- Take note of the candidate's attire/presentation and note body language
- Ask open ended questions
- What to they know about your firm?
- Do not ask personal questions



Orientation for New Staff

- Make sure you have a plan in place for training and getting the new member of your department settled and into the routine of your department
- Try to have a cheat sheet of phone numbers, pass codes etc. to refer to for routine matters
- Have manuals ready for instructions on how to use software etc.

Don't Burn Your Bridges

- Legal community is very small – everybody is interconnected
- Always want lines of communication open – you never know when you need to call on someone you once worked with for a reference, a favour, or possibly to fill a position in your firm
- Mergers tend to bring people back together

Top Ten Tips and Tricks

1. Determine what type of Manager are you applying to be/being promoted to – is this what you are looking for
2. Assess the Needs of your Department/Group
3. Implement changes slowly and don't try to "change the world" at once
4. Be approachable
5. Be responsible

Top Ten Tips and Tricks

... cont'd

6. Communicate
7. Be appreciative and respectful
8. Lead by Example
9. Don't burn your bridges
10. Join IPMA and take any management support programs and network with peers who do the same job as you



Summary

Top Ten Tips and Tricks

- If this is what you think you want for your future – go for it
- Utilize all resources out there – ILCO, IPMA and its Managerial Skills Seminar, private management seminars
- Good Luck!



Questions?