



**TO ENSURE SUPERIOR CLIENT SERVICE:  
TRAIN, RE-TRAIN AND CROSS-TRAIN YOUR STAFF**

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I continue to be amazed at what a cavalier attitude too many firms have about training employees. Some firms think training is optional. Some firms think training is too expensive an undertaking. Some firms think it is a waste of time and will have little if any impact. Some firms think training attorneys on anything not practice area-specific is insulting. Some firms believe all of the foregoing. But the smart firms know that training is an essential component of success, and doesn't have to cost an arm or leg to perform.

Let's start with some basic thoughts regarding training. First, today's offices are highly complex organizations. The procedures in effect can be daunting for new employees. You can't assume someone knows how to get a check for client costs, how to input time, or even how your conflict checking system works, without adequate training. Although all firms share the need to perform certain procedures, the exact procedures themselves can vary significantly from firm to firm. So training is required in all procedural matters.

Ethics seems to be a topic about which we make assumptions. For example, if someone comes from the office of a respected colleague, there is an assumption that all of the ethical rules are understood and followed. Yet, experience has repeatedly shown that sometimes what happens behind the scenes is far different – you might be surprised how fast and loose some people play with the RPC on a day-to-day basis. Or a simpler surprise is that ethical rules were never discussed at your new employee's prior firm. Don't take a chance on having it become an unhappy surprise. You are required to make sure all employees of the firm, professionals and non-professionals, know and follow the rules. And you are responsible if they don't. The only way you can be sure is to make it a routine part of orientation and training at your firm.

What about your software programs? You may think that if you're "plain vanilla" and use WordPerfect or the Microsoft Office suite, no training is required, because "everyone is using it, and our ad specified a need to know the software." I do extensive training on Word, PowerPoint, Outlook and Excel. Many students

arrive only after arm-twisting by the firm's administrator. They are sure it will be a big waste of time because they've been using the software for so long with nary a problem. I just love it when those people show up. Because I know with a certainty that at some point they will slap their forehead in astonishment and exclaim, "Oh my God, do you know how many steps I've been doing to accomplish the same thing?"

The truth is that many "accomplished" software users are unaware of its most powerful and helpful features. Your firm probably isn't getting a fraction of the value of the software if it doesn't provide training for each employee upon hire, and retraining frequently thereafter. What does that lack of efficiency cost your firm in labor hours wasted, and delays in turning client work around?

A few years back a major law firm in a large urban area contacted me about a problem with their latest class of associates. They simply were not being as productive in turning around work product as previous classes were. They were dumbfounded. My assignment was to determine what was creating the undesirable drop in productivity.

It didn't take long to complete the assignment. After just a few interviews with some of the new attorneys I knew exactly what the problem was. It seems that a few years previous the firm had implemented document management software. They did it to ensure that the firm's intellectual property was utilized efficiently by everyone at the firm in order to ensure no wasted efforts or overcharges to clients. A good move on the firm's part, especially when the increasingly complex collection of documents, research and forms reached over a million. They simply could not afford to keep reinventing the wheel.

When the implementation occurred, everyone at the firm was well trained. The firm missed only one essential step: it forgot to include this training in future orientations for new attorneys. So the very system which was implemented at a high cost to provide more effective leverage of intellectual property, became an insurmountable obstacle to the reuse of work product. In fact, even a simple letter done the day before was so difficult to find for the attorneys, they just did everything from scratch, rather than waste the time and psychic energy in increasing frustration trying to find even their own work product.

After training the class of associates, productivity took a sharp jump upward. So did morale, for that matter. Thereafter, the training schedule included coverage



of this important software package. And the problem has not reoccurred.

Repeated studies have shown that employees who receive on-the-job training are more loyal and long-term employees. An employer's willingness to invest time and money in training an employee makes the employee feel highly valued, and feel that the employer wants them to be successful. Have you ever had a job previously where you were sure your employer was secretly making bets with others about how long it would take you to fail at your job? Some employees literally feel they are being set up to fail at some jobs. And it can become a self-fulfilling prophecy.

Before you smugly think it doesn't matter in the grand scheme of things if some employees can't make it on their own in your sink-or-swim environment, consider that the actual cost of turnover can be anywhere from 75% to 200+% of an employee's annual salary. That's a much more expensive cost to the firm than the cost of training. What is not in the equation makes it more disturbing: bad word of mouth about your firm.

Never underestimate the effect word of mouth can have on obtaining decent responses to employee searches. Regardless of whether you're looking for a staff member or associate, remember that it's a *very* small world out there, and getting smaller all the time. People don't want to take a job that they hear will probably provide the most stressful and unsuccessful listing on their future resume. They want to join a firm where they will be welcomed, appreciated, and successful. All of this can be accomplished with a good training and orientation program.

I've mentioned at the outset that training doesn't have to be expensive. If you have a few staff members and an office manager, they can share the responsibilities of passing along information. Use of a simple checklist will ensure that everything is followed in a precise sequence and consistency of content from one new employee to another. That way, when you get someone who does a belly flop, you'll know you're probably dealing with deficient skills, not just bad training and orientation.

If you're a solo or very small firm, you can always hire someone to come back when you have a new hire and go through your training program with them. There are human resource and technology consultants who can come in, go over everything in their area, complete any necessary start-up work, and get the employee up and running quickly, efficiently, and confidently. It doesn't cost a fortune. Heck, it doesn't cost a fraction of the cost that a failed hire creates.



So it's your choice. Would you rather invest later in another round of frustration, and possible poor client service or malpractice, or invest sooner to ensure success and a pleasant working relationship with happy clients as a result?

But here's the catch about training: studies reveal that people, no matter how bright, will usually retain only about 40% of what they're taught. And that number is a "use it or lose it" figure; meaning that with each passing day they cannot apply the new knowledge, the amount ultimately retained reduces even further. So you have to be able to back up training with written materials which can be referenced, and/or retraining in the most important areas.

Now finally, the icing on the cake involves cross-training. If you want to ensure that your office functions like a well-oiled legal machine no matter who shows up on a particular day, you should make sure that cross-training is a required part of your training program. Examples of successful cross training include the office manager who can step in for the bookkeeper during vacations or extended illness. Another example involves the ability to take work from one department and off-load it to another department in an emergency without losing proficiency. Or the attorney who can step in while a colleague in another practice area is laid up.

I am always amazed at a simple demonstrated lack of cross-training at small firms I contact by telephone. Often secretaries are required to cover the reception desk during breaks and lunch. That's a good thing. But at some firms it's all too obvious that no formal training has been provided. And that's definitely *not* a good thing. I am often greeted with a decided lack of professionalism, particularly in the fine art of questioning what the call is regarding. I am frequently misrouted, disconnected, and a couple of times made to feel like a total imposition. On the rare occasion when I make a comment, I am often quickly rebuffed with, "I'm not the receptionist, I'm just filling in." Certainly not an answer which excuses the behavior.

When I managed mid-size firms, I always made sure that every manager was cross-trained in at least one other manager's area of responsibility. Not only did it foster greater understanding and cooperation, it also ensured that no operational area ground to a halt in the absence of a key employee. I always felt I demonstrated how well I did my job not when I was so irreplaceable I could not take a day off, but rather when I could take a week off and the office continued to function smoothly.



What about your attorneys? The larger the firm, the more likely it is that attorneys quickly become pigeon-holed in narrowly defined practice areas. Often this happens early in an attorney's career, and without much input on the part of the affected attorney. Downstream it can lead to an attorney who has become unhappily trapped in an area of practice which has become unprofitable and/or undesirable. And the higher the attorney has climbed on the compensation ladder, the more improbably it becomes that the firm will assist the attorney to retool for another practice area. The same can apply to paralegals, and even secretaries who are unable to help with emergencies in other departments due to a decided lack of knowledge and procedures.

I always recommend that your paralegals and support staff, at a minimum, be required to "shadow" someone in another practice area and help out with overflow assignments from time to time, in order to ensure they are cross-trained. If your firm makes sure this happens, I can assure you that an unexpected injury or sudden illness will not adversely affect your ability to meet client demands and maintain smooth operations.

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