

Managing

How to Create a Genuine Partnership with Your Assistant

MARCIA PENNINGTON SHANNON | It's the envy of any law office—that relationship between lawyer and assistant who appear to be the perfect team. The two work in tandem so effectively and efficiently that it's almost as if they can read each other's minds. How, you have to wonder, do they make it work?

These relationships may seem rare, but they are not flukes of nature. They are the result of hard work. More specifically, they are built on three key ingredients: commitment, cooperation and communication. Those ingredients, unfortunately, are often missing from many lawyer-assistant relationships.

Ask yourself these questions:

- Are you and your assistant committed to the same goals and to making the relationship as effective as possible?
- Do you view yourselves as a team, cooperating with one another and sharing in accomplishments?
- Do you routinely communicate your priorities and needs to your assistant, as well as understand the demands that he or she is under?

If you answered "no" to any of the



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preceding questions, it's time for you to revamp this vital relationship.

Begin at the Beginning

Begin by looking at the goals you have for your practice—what you hope to accomplish over the next year, in three years and in five years. These goals should drive how you spend your time, and they should be the foundation of the relationship between you and your assistant.

Teams are successful because they are committed to and working toward shared goals, so you need to communicate your goals to your assistant.

Chart Who's Doing What

The next step is to determine how you and your assistant are actually spending your time. A good way to do this is to set up a chart that tracks your daily activities over the course of a workweek. Use these four column headings for each day:

1. Time
2. Activity

3. Analysis

4. Responsible Party

Under Time, break out your day into half-hour increments—7:30 a.m., 8:00 a.m., 8:30 a.m. and so on.

In the next column, under Activity, record the tasks that you perform throughout the day. Be as specific as possible regarding your tasks—and be sure to record them each half-hour as you go. Don't wait until the end of the day to write them all in your chart in one big batch. (Our memories don't usually serve us that well!)

Then, at the end of the week, use the Analysis column to evaluate your activities along these lines:

- Which tasks are reoccurring?
- Which are absolutely necessary?
- Which could be eliminated?
- Which could be delegated?

Keep in mind that reoccurring activities are often an opportunity to delegate. You should be spending your time on activities that will help you meet your goals. Minimize activities that do not.

Lastly, complete your chart by using the fourth column to identify which tasks must be performed by you personally, which can be delegated to your assistant with some additional training, and which can be delegated to your assistant immediately,

without any training.

Your assistant should keep his or her own chart for a week as well, with the goal of learning exactly how time is being spent. Are all your assistant's activities really necessary? Are there opportunities for greater responsibility? Is the workweek being fully utilized, or is there too much downtime? Remember, your assistant's activities should be contributing to your team's goals as well.

It's important for the two of you to sit down together to analyze both charts. Are each of you spending your time in efficient and effective ways? Are there times you've been working at cross-purposes? Are there activities that are being duplicated? Discuss tasks you've identified that can be delegated to your assistant, and determine what information or additional training will be needed to accomplish those tasks. And be clear about how those tasks contribute to the team's goals. When you give your assistant full responsibility for delegated activities and identify how she or he will contribute to the team's accomplishments, you are encouraging commitment and cooperation.

Fine-Tune Those Organizational Systems

Together with your assistant, look at all your time management and organizational systems—your various scheduling, billing, filing, recordkeeping and other processes. Consider whether, and how, each system could be made more effective and workable for you.

Involving your assistant in analyzing and revamping your time and organizational systems gives him or her an understanding of what you hope to accomplish with each system

and how these systems fit into your practice goals. This is especially important since, after all, it should be your assistant's responsibility to update and maintain these systems.

Keep Communications Regular and Open

In this relationship, as in any relationship, communication is crucial to success. How are you and your assistant communicating at present? If you're not already holding regular meetings, try starting each week with a meeting in which the two of you discuss the schedule and the priorities for the entire week.

In addition, you should be meeting at the beginning of each workday, say for five to ten minutes, to review the day's priorities and other matters that will need your assistant's particular attention.

Gain More Time and Greater Satisfaction

The best results of creating an effective partnership with your assistant will come in the form of increased time and greater work satisfaction for both of you.

Too often, lawyers don't recognize that if they make the effort to build a strong connection with their assistant, they will likely save a great deal of time each and every week—time that can be used to accomplish their practice goals and priorities, as well as enjoy more personal time outside the office. In addition, satisfaction in work for both you and your assistant will continue to grow, in turn creating still greater cooperation, communication and commitment in the relationship. Ultimately, your partnership might even appear effortless to others. You, too, can become the envy of the office! **LP**

Action Plan

- Keep track of your activities over the course of a workweek. Which tasks can be performed only by you? Which ones can be delegated, with or without some training?
- Have your assistant keep track of his or her activities for a week. Do these activities contribute to the goals of the practice? Are you using your assistant's time as efficiently as you could, or can you delegate new responsibilities?
- Review your organizational and time management systems with your assistant. Together, look for ways to create more efficient processes. Put your assistant in charge of updating and maintaining your calendar, billing, client records and other appropriate systems.
- Hold regular meetings with your assistant. On Monday mornings, review the goals and priorities for the entire week. On other workdays, meet each morning to spend a few minutes discussing the day's priorities and what additional assignments you expect to pass on to your assistant.
- Make sure the lines of communication always run two ways. Good communication bolsters cooperation and commitment, leading to an ever-stronger partnership.
- Learn additional pointers by reading *Getting Things Done: The Art of Stress-Free Productivity* by David Allen (Penguin Books, 2001) and *Leveraging with Legal Assistants: How to Maximize Team Performance, Improve Quality, and Boost Your Bottom Line*, edited by Arthur G. Greene (ABA, 1996).