

[Jump to Navigation](#) | [Jump to Content](#)

## Popular Threads on Solosez

### What Are Good Practices with New Staff?

So I am shocked this morning to find out that my assistant, when asked to prepare a Proof of Service, told me "Oh yes, I have the one from blankety-blank's case, I make one quickly using that to copy from". Not shocking? No, not at all -- makes perfect sense.

Except all my assistant did was add the new addresses I gave him to the old POS and did NOT DELETE THE TWENTY addresses (creditors for a bankruptcy) that were on it. I had reviewed the documents he sent out, but I just glanced at the POS and made sure it had the correct addresses that I had provided to him. He clearly has no idea what a proof of service is for - - this is not the kind of mistake one could make as a tiny slip-up, but shows a lack of understanding as to what service is all about.

No harm done really -- twenty-odd creditors are going to get notices of a BK they care nothing about, but worse mistakes have happened. What concerns me is I am getting more and more worried that my assistant does not really know some of the things he says that he does. He had a long resume and I know he is knowledgeable in some areas, but this is not the first simple thing he has done wrong. Having to redo or review on a line by line basis every document he creates really takes away from the effectiveness of an assistant, I feel!

My question is not how many lashes to give my assistant now (JOKE!) but what systems do you all have in place (if any) to get a good handle on what your staff members DO and DO NOT know? I had gone over one POS with him -- I thought just for a review and to double-check -- but that apparently was not enough.

Also -- how much do you review work done by staff before it leaves the office?

---

With my staffers of 17 and 10 years, I review everything. Not as well as I should, but I read the letters, reread the corrected letters. I check POS, and captions.

They get them right 90+% of the time, but that is not good enough for my workproduct. I also made all the typos that clients or courts find. I don't blame them for typos, since I should have caught them.

Get a Legal Secretary's Handbook, and go through it with the assistant a chapter a day until he gets it. You are the owner of the firm, so it is your duty to train the staff. (I learned this when my daughter went to work for a chain restaurant as a waitress, they trained her two weeks before letting her deal one-on-one with a customer.)



### Subscribe to Solosez

First Name

Last Name

E-mail Address

Submit (input element)



### Unsubscribe from Solosez

E-mail Address

Submit (input element)



### Books

Click on the book for more info



The worst problems I find are the assistants with experience, who probably worked someplace that does less training than I do, and they think they know what I want, and object to getting it done my way.

BTW, watch out when he starts faxing info to an unspecified list of people, everyone might get the formerly confidential documents. At that moment firing the assistant will not solve the problem.

Ted Waggoner

---

Many years ago now, Dick Howland made a very good post to the list on a similar situation. In that case, he was posting regarding new associates, but I think the same applies here. For the first year of their employment, plan on losing money on your employee. First, you are training them. You have to look at everything they do carefully, to the point that you are spending more time than you did without an employee. Second, they do not know your clients and will be spending extra time asking you questions. Even an employee that comes from another office will cause you to spend the time to train them to your way of doing things.

The pay off for doing the extra work is an employee that you can start to trust to do things right. That doesn't mean never checking their work (that leads to malpractice), but it does mean not making sure every comma is where it should be. Oh, this will include attorneys, paralegals, secretaries, and receptionists. Heck, it will probably include your janitor since you will want to make sure s/he is doing their job as well.

Remember, when you have employees, you no longer work for yourself, you now work for them. You must pay their salary every week and you must pay them first.

Frank J. Kautz, II

---

To answer the question concerning number of lashes...20 sounds about right... BUT they can only be with a wet noodle. It shows that with new staff have to watch carefully with every new thing, because one never knows what holes there are in their experience. Sometimes the simple things are unknown to them and lead to errors, where more "complicated" matters are done very well. A warning to us all.

Alan P. Bernstein

---

With new staff especially, just because they say (or think) they know something does not excuse your needing to closely supervise. With long time staff, some get sloppy. Checking up on them is required.

My recommendation is to take a minute, clear your head and check on what they are going to send. Try to look at it fully as if for the first time. Train, cross-check and verify steps. Over time and with occasional cross-checks then more can be relied on.

It is occasionally amazing how many and varied are the ways that

someone else can think of to screw something up. The longer I practice law and the more assistants I have had through here, the more I see that issue. I do not need any help to screw something up, but need all the help I can get to do it timely, correctly and accurately.

Darrell G. Stewart

---

Yep, this kind of goof-up is common around here. The staff is uncommon quirky and the boss is a beotch. But we're minimizing our friction in a couple of ways.

In Word Perfect, I have Get\_\_\_\_\_ templates. I love 'em. As I open the client's file, I have to type all the contact info anyway, so I block it, click on Tools|QuickWords, and I name it "Getkleinpeter." Same with opposing counsel.

I create Kleinpeter's folder under c:\CLIENTS. I already have a court caption template. When I draft the first pleading in the Kleinpeter case, I save it in the client's file as Kleinpeter\0 Caption. It always floats to the top of the file list.

I have a form file in the c:\CLIENT FORMS directory. I also have some QuickWord forms such as getconsult for those Quick Questions I'm willing to take or the potential client caller, getfilenote, getltr (ltrhead), getcertmail, which is the I certify I mailed ... and it's also on the client's caption document.

You get the idea. Automate what you can. Have a form file. I'm still revising and adding to a 3-ring binder. Not sure why, but I like having the forms on paper and in some kind of chronology. Maybe it's for my assisting attorney, or when the staff overthrows the benevolent boss.

CJ Stevens

---

All excellent responses so far and I imagine there will be more.

How about staff signing firm checks? Client trust account checks? NOT! I have not been burned on this as staff have never been authorized to sign, but point out the potential problem.

Training? Many on this list no doubt foster great training and experience for staffers. Does anyone use noncompete agreements with staff? I realize we cannot with the attorneys but what about staff members?

Ever see outgoing mail still sitting in the outbox when locking up late in the evening? Where are the closest mail drops and what are the pickup times?

Do you have workers compensation insurance? What if a staff member has a collision while driving to the post office? The insurance is cheap for office workers.

Also, they need to know the importance of client confidentiality and

waggless tongues.

Rob V. Robertson

---

Great idea on the Legal Secretary's Handbook -- any suggestions on one -- anyone? anyone? anyone? (sorry...it's a beautiful day today and I'd rather be anywhere but here dealing with a list of 800 annoyances so I had to slip in a Bueller reference...)

Amy Kleinpeter

---

Legal Secretary's Complete Handbook, Mary DeVries. Prentice Hall 4th Ed. is what I found first.

585 pages, 21 chapters and forms.

Ted A. Waggoner

---

For California practitioners, I suggest these books from Rutter Group:

<http://ruttergroup.com/legalsec.htm>

One of my former assistants had a set, and she found them invaluable.

Scott I. Barer

---

well, I don't have real "staff" yet, but I have a friend's college-aged daughter who is helping me out about 10 hours a week doing filing, general office admin stuff.

Last week, I had gotten in a BOX full of papers from an attorney that I'm associating with, it was the bulk of the client's case, not in any type of order. I had my "assistant" go through the box and as I worked, she was putting them into categories to file: pleadings, depositions, correspondence, exhibits, etc. She did that, with my help, in a couple of hours. I had to leave for court and I told her to take each stack and put them in chronological order for me. When I picked up the stack of exhibits the next day to get my stuff together for a deposition, I realized that she had put EVERYTHING in chronological order, including every attachment in the requests for production. I couldn't find ANYTHING!

I'm learning along with her!!!

Elizabeth Robinson

---

(Maybe) I am a control freak, but as I contemplate bringing on my first part-time assistant, I am leaning in the direction of someone with absolutely NO experience in the legal field. I would rather have someone who is very smart, wants to learn, and can comprehend concepts easily even if she has no "legal background". It comes down to this -- Would you rather train someone or untrain and then retrain someone?

Based on what you guys are saying here, it is clear we have to train new employees about privilege, confidentiality, purpose of documents, our unique office procedures, and to monitor how all documents are used. Is it better to do this with someone intelligent with no legal background or someone careless and cocky who has "experience" in the legal field? In the past I have found my experienced secretaries, clerks, staffers, paralegals, etc have hit-and-miss training. I always reviewed everything they do, (my ethical duty as well as scared-out-of-my-mind-as-to-what-the-heck-they-are-doing-over-there duty).

Also, if I brought on someone for evening/weekend work who was a legal secretary/paralegal/clerk at another law firm during the day, I have to worry about conflicts of interest with the other law firm employer. A non-legal assistant doesn't have those conflicts (or at least fewer of them).

Michelle J. Rozovics

---

Elizabeth's comment about the assistant putting things in order made me think about the temp who was asked to put the trust account checks in order.

She put about 500 checks in order, by the dollar amount of the check. I confess. I didn't direct her to do it by the date on the check.

I have seen other situations like this. It is hard sometimes to appreciate the background some folks are coming from. As you gain more experience, your thinking jumps from Step 1 to Step 10, while your assistant, or associate, may be working through all ten steps to the answer.

It is hard to balance between assuming that they are on the same plane as you and assuming that they know absolutely nothing.

Jim Pardue

---

I am buying both! For anyone else interested -- it is \$279 for both the Legal Professional's Handbook (2 volumes) and the Law Practice Handbook.

-- Amy Kleinpeter

---

They look interesting. Does anyone know if there is a similar set for Missouri?

Marian Palma Cardona

---

Don't know about MO - - but a friend and I have been planning on setting up a company to create this sort of manual (plus a live course) in Illinois. We always wondered whether firms would pay to have their secretaries go to one or two days worth of intensive office support training for litigation and/or transactional practices.

We have been planning to do this for the last five years. I guess there truly is a need. Good to know.

Michelle J. Rozovics

---

Check the website of the St. Louis legal newspaper (I forget the name). Seems they used to publish something like that. Also check with BAMSL (Bar Association of Metro St. Louis) because they might have published this after the legal paper stopped.

Meg Tebo

---

[Back to Popular Threads](#)

[Back to Top](#)