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MARKETING THE LAW FIRM

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Two Techniques That Up Your Team Management Skills In 2023

By Sharon Meit Abrahams

Being a good team leader is not easy. It is your responsibility to manage everything about the people and the positions you oversee. Good team leaders create an environment in which attorneys and staff work hard, are loyal, and add to profitability. Setting expectations and goals is an essential step in becoming an effective team leader. Make a commitment this year to up your management skills with these two key techniques.

Setting Performance Expectations

Your role as a team leader is to clarify expectations related to specific tasks, overall performance, and behavior. When you add a new team member, you typically do not know whether that individual will succeed and grow in the role or fail. Current team members have an idea of what is expected and how to do what is required, but they still need guidance. Whether new or existing it's never too late to establish, clarify, and discuss expectations.

- Discuss the position in terms of outcomes. Every legal team member has a purpose. It might be to draft documents, make timely filings, or even to pleasantly answer the phone. No matter what the "end product" is, it is your responsibility to share the desired outcome with your attorneys and staff. You can give parameters, measurements, examples and even demonstrate how you want them to perform a task. If your team knows what is expected, they can perform their functions appropriately and effectively.
- Mutually identify necessary skills, resources, and guidelines. In some situations, your team member might not have the skills or knowledge to fulfill all their job duties. It is your responsibility to provide the training and knowledge necessary. You can personally provide this information, enlist others, use online tools, or allow access to training programs to support their learning needs. Investing in team members' skills is one of the best ways to increase retention.
- Determine priorities. In a busy legal environment, attorneys and staff might become overwhelmed with multiply demands. Guidelines should be set so they know what and how to prioritize. Sometimes it is not tasks, but people who have conflicting demands that put pressure on an attorney or staff member. For example, give staff tools like access to the docketing system, so they know how to determine priority or give associates resources to turn to if a work conflict arises between partners.

- Check for understanding and commitment. After you discuss performance expectations, ask the attorney or staff member to paraphrase what they heard. Check that they understand the importance of their role and the nature in which their job should be executed. If you determine things are not clear, discuss the expected job outcomes again in a different way, or using different terms. This might seem tedious, but it is critical especially if a team member is failing to meet expectations.
- Set status report meetings. Most firms have an annual review process which is a formal system for delivering feedback. A status report meeting is an opportunity for you to check in periodically with team members to be sure they are performing their functions as you have outlined. Status reports can be weekly, monthly, or even individually — as often as you feel necessary to stay on top of their work product. These meetings offer the opportunity to get out in front of any concerns before they become issues that affect productivity.

Setting SMART goals

In business as in life we can only move forward if we know the direction we are going. As a team leader it is your responsibility to help your team move in a direction that is aligned with performance expectations. The best managers work hand in hand with their direct reports in developing goals that are associated with expectations. The goals should be geared toward achieving day-to-day work accomplishments as well as their professional aspirations. All goals, whether short term or long term, should be **S**pecific, **M**easurable, **A**ttainable, **R**esults-oriented, and within a defined **T**imeframe (SMART).

- Determine specifically what needs to be accomplished. A goal that addresses who, what, when, and why is more likely to be attained than a general statement. For example, a goal of *increasing* billable hours is vague. The statement “I will increase my billables by one hour every day to hit my firm’s billing requirement by December 31” is specific.
- Create a measurement. Establish a benchmark that can be measured, so progress towards success can be determined. With measurements it is easier to stay on track and small achievements tend to spur people toward continued effort. For example, if client inquiry calls are to be returned within 24 hours, then set up a tracking system to measure responsiveness.
- Goals should be attainable. If team members have unrealistic goals, they will disappoint the firm and themselves. Help them chose goals that stretch and help them grow. By homing in, on short term goals that roll up into larger goals your team will feel a sense of accomplishment as they progress in their roles.
- Identify desired results. Whether it is to improve the department, practice group or individual help your team to formulate the results they want to see and measure. If someone wants to learn how to make engaging client pitches, talk about what the result would look like. Is it to create exciting presentations with lots of animation or is it to deliver content in a concise and clear manner? Knowing the desired result allows the individual to define steps for moving forward.
- Set a deadline. With an agreed upon timeframe individuals will be focused on the goal. Many aspects of practicing law are guided by external deadlines so this should be the easiest part of setting goals for your team members. The key is holding them accountable for meeting the deadlines.

When you communicate expectations and set goals you help your team understand their impact on the entire team as well as the firm. This ultimately leads to higher engagement, motivation, and productivity.

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