



Clodagh Beaty – Secretarial Role Development Experience

The Legal Secretarial Role

I am a recognised expert in the legal secretarial role and am regularly invited to speak at conferences and forums and contribute to industry publications. Prior to moving into the field of HR and development, I spent ten years as a legal secretary in a number of different law firms. This experience has given me a unique understanding of the role and the challenges faced by law firms in ensuring that they have a skilled and motivated secretarial workforce which is utilised efficiently.

I have been involved in major review and restructuring projects in a medium sized City law firm and a large national firm. In my experience, the requirements of the secretarial role will depend on many factors including the type of practice, the culture and the firm's long term strategy. The approach I have taken with reviews has been to look at the particular requirements of the organisation in question. It is important to involve lawyers and secretaries in the process wherever possible in order to minimise resistance to change. This also assists in setting the firm's expectations and generating acceptance of the changes.

Some examples of how I have worked with firms to identify and develop the scope of the secretarial role are:-

- Reviewing the firm's business strategy and culture to determine how the secretarial role will 'fit' in the organisation.

- Designing and undertaking detailed research, using surveys and structured interviews, to ascertain the type of support required by lawyers and to determine lawyers' satisfaction levels with the secretarial role.
- Implementation and facilitation of a series of focus groups and workshops with lawyers and secretaries to stimulate debate on the future of the secretarial role.
- Working closely with other support functions such as business development and finance to challenge traditional boundaries and determine how secretaries can provide greater support to lawyers and bridge the gap between the support functions and lawyers.

As part of both reviews I have designed a range of internal documentation to support the process. This has included job descriptions, competency frameworks, appraisal documentation, secretarial handbooks and development workbooks. In my experience a clear and well designed set of documentation is essential in implementing a new or redefined role. As well as clearly setting out expectations, it assists secretaries in making the transition into the new role and enables performance to be measured against an objective set of criteria.

Many firms are beginning to appreciate the benefits of having a defined structure in place for secretarial teams, both in terms of management and career development. My experience in this area is significant, and my recommendation to implement a standalone secretarial management role at Lawrence Graham meant that it was amongst the first City firms to do so. With the relatively flat secretarial structures that exist in many firms, it is a challenge to implement a structure that offers true career development opportunities. My work in this area includes looking more creatively at secretarial structures to identify career development opportunities in specialist areas such as business development and project management.

Some specific examples of the work I have done in this area include:

t: +44 203 239 2815 (UK)
m: +34 676 323 495 (Spain)
e: clodagh.beaty@bigbluecoaching.com

- Preparing detailed board papers highlighting the various options available for secretarial restructuring and demonstrating the value of a defined management role, including providing detailed cost benefit analysis.
- Designing and running assessment centres for secretarial manager roles.
- Implementation of new secretarial management structures and coaching new managers.
- Implementation of a new Legal PA role and capability framework including workshops with lawyers and support staff.

The scope of consultancy services I can provide in relation to the secretarial role are:-

- Undertaking detailed research to determine the scope of the future secretarial role and advising on defining of the future secretarial role, including secretarial management structures.
- Design and implementation of job descriptions, capability frameworks, secretarial structures, career development frameworks and assessment centres.
- Design of workshops and events to communicate role or structural changes.
- Design and delivery of associated skills training for secretaries and lawyers.
- Advice on any associated communication programmes and change management.

Outsourcing of transcription

Many professional service firms are looking at how they can utilise their secretarial resource more effectively. As well as restructuring their secretarial function and upskilling secretaries, many firms are considering outsourcing transcription and document production. I believe the outsourcing of transcription is likely to increase as firms continue to focus on the most efficient use of their resources. Pinsent Masons was the first large UK law firm to successfully introduce an outsourced transcription service on a large scale and I have managed this project from the outset for three years. During that period, I was involved in every stage of the project. I successfully integrated the transcription service whilst continually increasing utilisation and improving the quality of the service, processes and working practices.

The introduction of an outsourced transcription service is a significant change project and is often viewed as a threat by both lawyers and secretaries. Whilst it is essential to get the initial communication right and involve people in the process from the outset, the service needs continual management in order to succeed.

During the course of the last three years I have:

- Determined how the transcription service should be utilised and identified what type of work should be outsourced and what processes and procedures should be put in place to support this.
- Designed and run a series of seminars outlining the benefits of the service and explaining how it works.
- Worked with lawyers and secretarial teams to overcome resistance to the service, help them understand how the service can benefit them and encourage higher utilisation.

- Investigated issues and problems with the service, identifying solutions and continually improving both process and quality.
- Provided regular analysis and feedback on utilisation and performance of the service, identifying patterns and potential issues.
- Undertaken detailed analysis of cost savings achieved by introducing a transcription service.

My experience in this area means that I am extremely well placed to provide advice on the benefits of outsourcing transcription, the range of services available and how to project plan and manage what is an extremely complex change process.

Managing Change

The projects I have managed have all been accompanied by resistance to the proposed changes from various stakeholders. I have played a fundamental role in overcoming that resistance and achieving acceptance and support by my understanding of the process of change, my ability to persuade stakeholders to look at things from a different perspective and my consultative approach.

Some examples of the approaches I have taken to overcome resistance to change and manage change programmes effectively are:

- Ensuring senior management support by developing effective relationships, demonstrating the potential benefits of proposed changes and guiding the decision-making process. This has included regular presentations and discussions at board meetings.
- Communicating regularly and making sure all information is clear, complete, and accurate and is delivered in the appropriate way, with an emphasis on face to face communication by the appropriate person. This has included planning a comprehensive communication strategy utilising a range of approaches including presentations to teams of secretaries and lawyers, one to one meetings, a dedicated intranet site, focus groups, briefing notes and e-mail updates.
- Putting the change into context and explaining the reasoning behind the proposals to help those affected understand and appreciate the need for change.
- Being clear from the outset about the potential outcomes of the change process and giving information on timescales.
- Involving those who will be affected in the process, actively seeking their views wherever possible.

- Ensuring that a consistent message is being delivered by all those involved in the project.

Some examples of services I can offer in this area include:

- Advising clients on how to structure a change programme to ensure maximum buy-in.
- Coaching managers on how to manage change.

Qualifications and Experience

- 20 years' work experience in the legal industry
- 8 years' experience as an HR Manager, Learning & Development Manager and HR Project Manager in the legal industry
- LLB (Hons) from Birkbeck College, University of London
- MA (Merit) in HR Development from Middlesex University Business School
- Qualified Co-Active Coach
- Qualified NLP Practitioner
- Qualified MBTI Practitioner
- Qualified Thomas PPA Practitioner
- Winner of the CIPD national prize for best management report in 2005 for my Masters dissertation, *"The changing legal secretarial role: increasing the quality of client service through a secretarial training and development programme"*.
- Case study on the Helping People Learn area of the CIPD website entitled *"A training and development programme for legal secretaries"*
(http://www.cipd.co.uk/helpingpeoplelearn/_el.htm#LG)

Publications and presentations at conferences and forums

t: +44 203 239 2815 (UK)
m: +34 676 323 495 (Spain)
e: clodagh.beaty@bigbluecoaching.com

- The Lawyer, *"Tapping Talent"*, 2 March 2009 <http://www.thelawyer.com/hr-and-training-special-report-tapping-talent/136966.article>
- The Lawyer conference, *"Enhancing the effectiveness of the Legal Executive PA"* on 22 and 23 April 2008
- HR in Law Quarterly Meeting, *"Intelligent Outsourcing of Secretarial Staff"* on 13 March 2008
- Ark Group conference, *"Motivation, remuneration and career development for law firm support staff"* on 13 September 2007