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The Top 8 Staff Training Tips for Estate Planning Law Firms—Part 1

By Kristina Schneider, Executive Assistant

Having worked with so many estate planning attorneys and support staff members, time and time again, I have seen that one of the major breakdowns in firm systems comes with the lack of proper job training. Things start to slip through the cracks and while one or two details won't make or break the success of your firm, the compound effect of multiple staff members not trained right and doing their job duties as originally intended will become one of the biggest challenges for any brilliant estate planning attorney trying to manage and run his or her own law practice.

I have assembled for you what I believe to be the top eight tips for properly training your law firm staff, whether you the attorney/business owner or someone else you delegate to is in charge of the staff training.

Law Firm Staff Training Tip #1: It Starts at the Beginning.

Staff training really starts at the beginning. What do I mean here? It begins with the hiring process, because the more time that you take to diligently seek out a new hire that meets the skill, education, and experience requirement that you desire, the better off you will be in the training process. Don't fall into the typical trap of being "quick to hire, slow to fire". It should be the other way around. Take your time to find the right candidate and staff person to join your team. As you will see from the remainder of this article, you will be spending valuable time training this person to be an integral part of your firm, so the more you can find the right candidate from the start, the remaining time that you invest into this person will be well-spent and benefit you (and your firm) in the long run.

Law Firm Staff Training Tip #2: Make Staff Training a Priority.

After you've hired the right staff member (or even with your current staff), it is imperative that you make staff training a priority. If you're a true sole practitioner and you're hiring your first staff member, then you will be the one to do the training. Beyond that first or second person, the initial staff members you hire can be responsible for the training of new staff, but it's important that you oversee that process to not only make sure that it gets done, but that it gets done properly. What happens in the first couple of weeks to thirty days of a new hire's time with your firm will be really telling, not only for you about them, but also for your new staff member about what it's going to be like working for you. Be sure to calendar and carve out the time to make staff training an important part of this person's every day schedule when they first come on board.

Law Firm Staff Training Tip #3: Utilize the Job Shadowing Technique.

Don't have a lot of time to dedicate to training? That's okay.

One of the best things that you can do for training is job shadowing. An important part of the job shadowing technique is to be sure that you slow down and explain what it is that you're doing. In fact, explaining the *why* certain things are done a certain way is helpful in their overall understanding of the task at hand and how it is done a particular way. During the job shadowing technique, it's important that the staff member take a lot of notes and, if at all possible, make sure that you utilize the next key step…

Law Firm Staff Training Tip #4: Use Audio and Video Recording Whenever Possible.

Another often overlooked step in the training process for many business owners is the audio and/or video recording of the training that you do. Not only is recording a training helpful in reducing the amount of time to re-do the training for any new staff members that may get hired, but it's also helpful for the current staff member to go back and use as a resource to understand how to do a certain task. One special bonus tip here would be that if you have a lot of computer programs that require training on how to use software or applications online or on the computer, invest a few hundred dollars and get Camtasia Studio® and a microphone/headset and record your computer screen during the training, as you explain what it is that you're doing (and again, the WHY). These recordings can be viewed later on and will be extremely valuable in training any staff members on how to do a specific task on the computer.

Stay tuned for steps 5-8 in the January 2016 Newsletter!

ABOUT THE AUTHOR:

Kristina Schneider is the current Executive Director of The Ultimate Estate Planner, Inc. She graduated with a Bachelor's Degree in Business Administration from Pepperdine University in 2004 and was hired right out of college to work for the Law Firm of Kavesh, Minor & Otis, coordinating and facilitating Philip Kavesh's "Missing Link" Boot Camps while also providing administrative support to Mr. Kavesh as his Executive Assistant for over 7 years. With a combined almost fifteen years of administrative experience and her direct experience working at Mr. Kavesh's law firm, Kristina has been able to assist numerous estate planning professionals through The Ultimate Estate Planner, Inc. And, equally as important, she has assisted the executive assistants and staff members of many of these estate planning professionals to provide better service and support. You can reach Kristina at by e-mail at kristina@ultimateestateplanner.com.

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