Core Competencies as a Performance (Talent) Management Tool
Core Competencies - Panel Members

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  Dr. Larry Richard, Principal Consultant, LawyerBrain LLC
Does your firm manage talent?
What are core competencies?
What are core competencies?

Any measurable behaviour of an individual that distinguishes performance in a given job, role, organization, or culture.

Example: Associate can draft an accurate, complete basic document in a transaction with minimal supervision (Second Year)
Competencies and Client Service

Key to unlocking the power of competencies is to understand they are a *management* tool – a way to continuously improve, expand, and manage delivery of services to clients.
What are core competencies?

What are key benchmarks and performance indicators?

**Benchmark Definition**

A measureable task (often measured as complete/incomplete)
(i.e. presented a motion for summary judgment)

**Key Performance Indicator**

Key performance indicators (KPIs) are ways to periodically assess the performances of organizations, business units, departments and employees. Accordingly, KPIs are most commonly defined in a way that is understandable, meaningful, and measurable.
(i.e. number of new clients; revenue per lawyer)
Examples please ... what are some core competencies?
What are some competencies?

26 Lawyer Effectiveness Factors (Shultz & Zedeck Study)

- Analysis & reasoning
- Problem solving
- Researching the law
- Writing
- Passion & engagement
- Diligence
- Practical judgment
- Provide counsel, build client relations
- Speaking, listening
- Influencing & advocating
- Fact finding
- Questioning, interviewing
- Self development
- Managing self and others
- Creativity, innovation
- Networking & business develop., etc.
We’re running a business here ... what is the business case for core competencies?
What is the Business Case: What do Clients Value?

- Client Focus
- Commitment to Help
- Provides Value for Dollar
- Understands Client Business
- Breadth of Services
- Brings Together National Resources
- Helps Advise on Business Issues
- Regional Reputation
- Unprompted Communications
- Deals with Unexpected Changes
- Handles Problems
- Keeps Clients Informed
- Legal Skills
- Quality Products
- Meets Technical Specifications
- Anticipates the Client’s Needs
- International Capability

~ BTI Survey of Client Services
## What is the Business Case: What do Clients Value?

### What are skills lawyers lack?

<table>
<thead>
<tr>
<th>Skill</th>
<th>Associates</th>
<th>Partners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding of Client's Industry</td>
<td>90%</td>
<td>51%</td>
</tr>
<tr>
<td>General Management</td>
<td>75%</td>
<td>45%</td>
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<tr>
<td>Understanding of Client's Strategy</td>
<td>70%</td>
<td>45%</td>
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<tr>
<td>Understanding of Business Jargon</td>
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<td>37%</td>
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<tr>
<td>Legal Skill</td>
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<td>0%</td>
</tr>
</tbody>
</table>

Glenda Hill

~ Pinpoint Consulting
What is the Business Case: What do Clients Value?

Business Case: Association of Corporate Counsel Seek Increased Client Loyalty and Satisfaction

Law firms that are better focused on *retaining the talent* and rewarding the skills that are valued by clients;

We require *training* at law schools and law firms that develops the needed skills;

and *matter management* that is driven by client expectations and needs.

~ *Association of Corporate Counsel Value Challenge*
The Business Case for Competencies

This equation...

...if implemented well...

means increased business for the firm that distinguishes its competent talent
Should we require everyone to meet every core competency?
How could we use competencies to improve the way we evaluate people?
How could we use competencies to improve the way we evaluate people?

- Formal Training
- Assignments
- Coaching
- Career Guidance

**Factors**

**Success**

**Evaluations**
This is just for big firms, isn’t it?
What’s in it for the associates?
What’s in it for the partners … is this just for associates?
Where do we get these competencies?
Do they need to be customized?
Will this help us with retention?
Does this fit with new pricing strategies?
What about other things (recruitment, PD, advancement, etc.)?
What about other things (recruitment, PD, advancement, etc.)?

- Performance Management / Evaluation
- Compensation
- Advancement Succession Planning
- Recruitment and Selection
- PD: Associate Dev Plans
- CLE Programs

Self Directed Career
How might a mid/regional firm’s competencies differ from a big firm?
What’s the process (i.e. Time, investment, steps to implement)?
What’s the process (i.e. Time, investment, steps to implement)?

Associates

What got you here

Will not get you there

Partners

Talent, resources

One Firm Thinking
Are there firms that shouldn’t adopt competency models?
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