

Core Competencies as a Performance (Talent) Management Tool



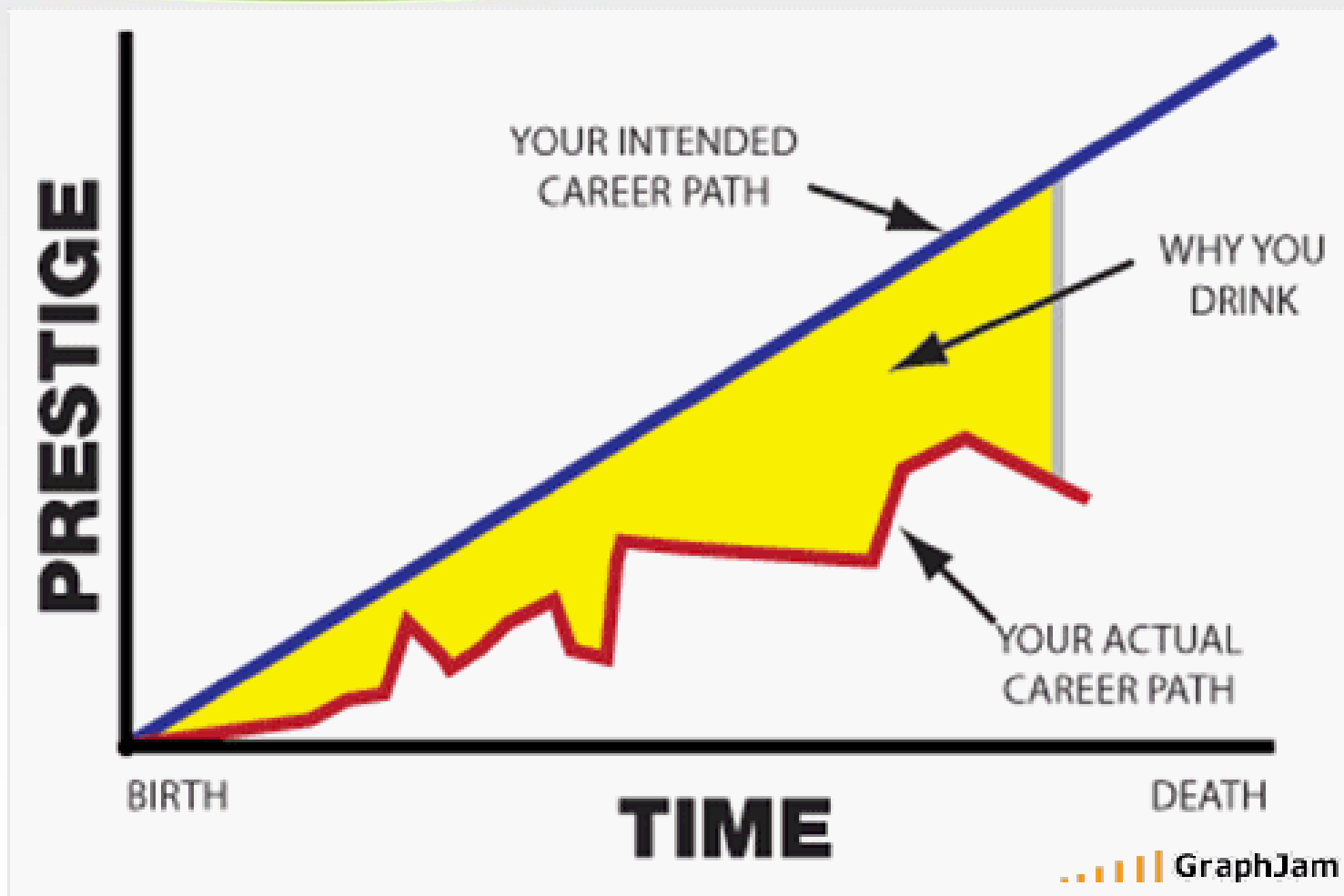
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Core Competencies - Panel Members

- Moderator: **Brad Proctor**, *Partner, McInnes Cooper*
- Speakers: **David Cruickshank**, *Partner, Edge International Consulting*
Andrea Nauf, *Director of Professional Development and Training, McInnes Cooper*
Dr. Larry Richard, *Principal Consultant, LawyerBrain LLC*

Does your firm manage talent?



What are core competencies?



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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)

What are core competencies?

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 measurable 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?**



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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.

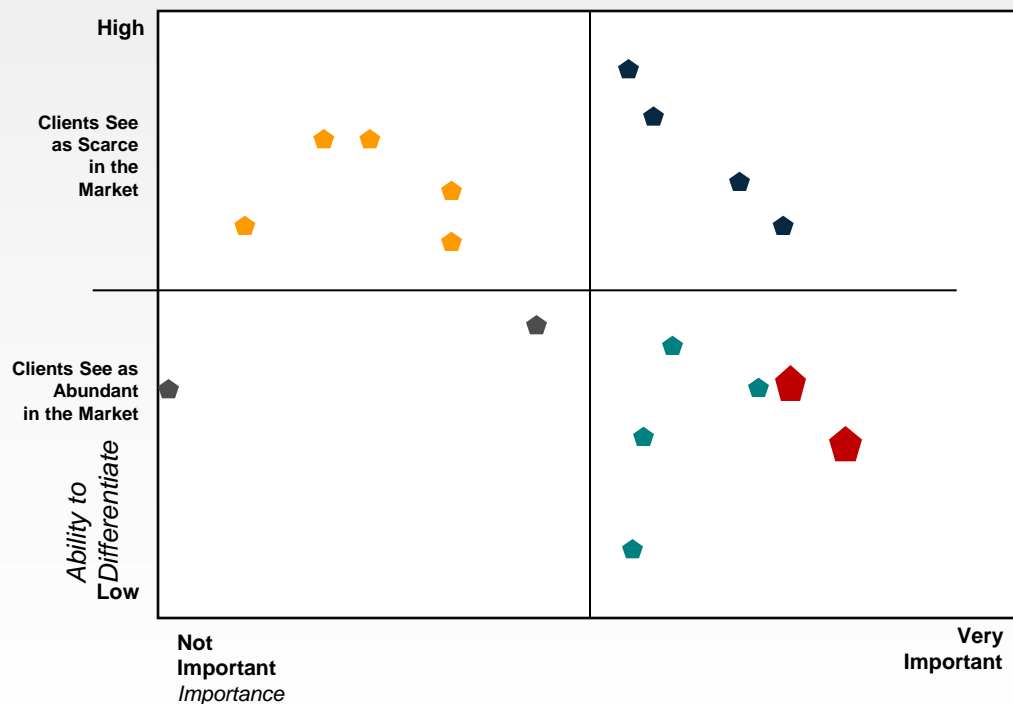
**We're running a business here ...
what is the business case for
core competencies?**



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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?

	Associates	Partners
Understanding of Client's Industry	90%	51%
General Management Glenda Hill	75%	45%
Understanding of Client's Strategy	70%	45%
Understanding of Business Jargon	65%	37%
Legal Skill	0%	0%

~ 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

What is the Business Case: What do Clients Value?

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?



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How could we use competencies to improve the way we evaluate people?



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How could we use competencies to improve the way we evaluate people?



This is just for big firms, isn't it?



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What's in it for the associates?



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What's in it for the partners ... is this just for associates?



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Where do we get these competencies?



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Do they need to be customized?



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Will this help us with retention?



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Does this fit with new pricing strategies?



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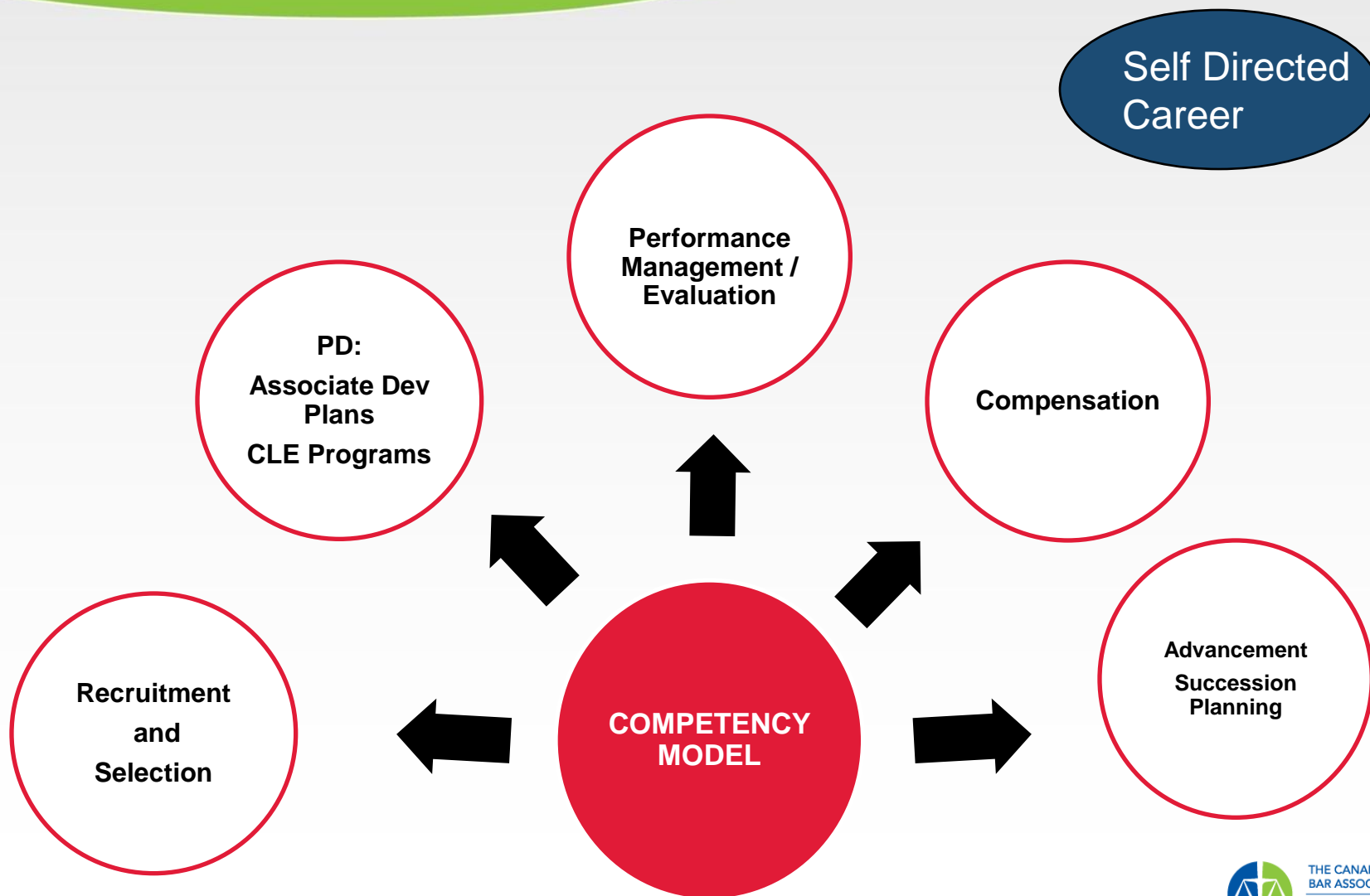
**What about other things
(recruitment, PD, advancement,
etc.)?**



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What about other things (recruitment, PD, advancement, etc.)?



How might a mid/regional firm's competencies differ from a big firm?



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What's the process (i.e. Time, investment, steps to implement)?



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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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