

PSL SERIES

CAREER DEVELOPMENT FOR PROFESSIONAL SUPPORT LAWYERS

Lucy Dillon

Knowledge and Innovation Consulting



1. INTRODUCTION

Professional Support Lawyers (“PSLs”)¹ have been part of law firm operational delivery for 25 years. As this arm of the profession matured, some firms introduced a Career Development Framework (“CDF”) for PSLs, but this is not yet widespread. This article outlines the benefits (and challenges) of having a CDF and an approach for designing a successful one². It is aimed at law firm management, KM leaders and legal HR professionals.

2. WHY DEVELOP A CDF FOR YOUR PSLs?

My focus is on how PSLs add most value to your business (see my previous article: “Putting PSLs at the heart of your value proposition”^[1]). A CDF is an opportunity to align one of your key resources with your longer-term objectives: a sustainable PSL function fit for strategic purpose.

A CDF defines the skills, activities, knowledge and attitudes required for success in role and should clearly link to the firm’s business objectives. It clarifies expectations and offers stretch, progression and professional satisfaction.

The majority of your PSLs will be experienced lawyers who will have had a clear career path ahead of them. Becoming a PSL puts them in a hybrid role, combining legal and business services skills. They may be uncertain what success will look like, which does not sit well with a career professional. A CDF can address that concern whilst providing benchmarks of success that your firm values.

These are some of the reasons I have put in place a CDF for PSLs:

- It is a recruitment imperative: the better candidates will ask for one and your competitors will increasingly have one
- It helps with retention: an authentic, well-articulated CDF sets the conditions for a longer-term future with your firm
- It creates a set of clear, consistent standards for PSLs who undertake a variety of functions depending on the needs of their practice group
- Your existing PSLs may raise this at their next annual review meeting
- It offers an opportunity to change the name and internal perception of the value that PSLs deliver. In my opinion, the word *support* does reputational damage to these highly experienced individuals who are often leaders in their field.

¹ I have used the term Professional Support Lawyer throughout this article for consistency. However, as referenced in paragraph 2, I think the term is outdated and should be changed to reflect the dynamic role these professionals play. Examples of alternative titles are in my previous article, see footnote [1]

² Note: this article does not address budgets or salary recommendations

3. PROPOSED APPROACH

I am often asked when the significant exercise described below should be undertaken. It is best practice to consider necessary skills and activities when you recruit your first PSL, and a light touch is recommended at this stage. In my experience, the more formal review outlined below is warranted for a team of over 10 PSLs.

I have helped a number of firms with their CDF using the following six-stage approach:

1. Communication

As with all change projects, communication is essential at the beginning (even if you don't have all the answers), during and at the end. From the outset, those involved (leadership, line managers and PSLs themselves) need to understand the rationale for, and the benefits of, the proposed change.

2. Identification of steering and focus groups

I suggest three groups: a) a small steering group to drive the project: a selection of PSLs and partners, and the leaders in KM & HR/L&D; b) a focus group of PSLs (imperative for credibility and authenticity) and c) a focus group of partners responsible for, or interested in, KM.

3. Data collection to identify PSL best practice

Interview the PSL and KM partner focus groups separately:

- PSLs: discuss what they currently do and what they could do/want to do, as they will have unique perspectives and expectations
- KM partners: discuss future business needs, what they want their PSLs to do and what their expectations are for the role in the future

Comparing the results of the two interview sets is very enlightening and provides a powerful baseline.

4. Build the framework

Note the following considerations:

- The CDF should be based on *existing tasks*. It should include stretch, but not be so aspirational that it bears little relation to the existing role and will lack buy-in
- It should combine elements of existing Lawyer and Business Services CDFs. Use the content of each to prepare a *hybrid model* reflecting the range of PSL work
- Each practice group will have different PSL requirements, so the framework should be *flexible* enough to reflect the skills and activities each group requires - see tables 1 and 2
- Provide a sense of *career progression*, by including levels and titles in your CDF, noting that these can create some tension (see "common challenges" in paragraph 4)
- You should address the *promotion process*. A strong option is to mirror your Lawyer promotion process, with appropriate accommodations (consider business case, an interview, a sponsor...)

5. More communication

The recommendations should have the support and buy-in of the KM partners before any further communication. Their role as champions will be key to bringing any concerned PSLs or partners on board and to achieving a successful implementation.

Present to senior management and work to gain their approval and support.

Any change is unsettling, so open communication with the PSLs will be crucial to get their acceptance and endorsement. The many positives of this move should be highlighted and any concerns addressed head-on.

6. Implementation and continuous review

The CDF launch should be integrated into the firm's normal performance review timetable. It should be shared after an annual review for implementation over the coming year: don't measure your PSLs against a framework they have not had chance to work to.

Any CDF should be kept under continuous review. I recommend a review every 4-5 years or when other frameworks are refreshed, to keep them aligned.

4. BENEFITS AND CHALLENGES

In addition to the benefits outlined in paragraph 2, I have seen these following the implementation of a CDF:

- The CDF will flush out the activities that provide the greatest benefit and will prompt consideration of alternative ways of meeting existing and future knowledge needs. A suitable prioritisation matrix (the "Blue Ocean Strategy") is outlined in my previous article ^[1]
- The data collection phase gives the KM partners (and in turn the wider partnership) a better understanding of the breadth of, and value delivered by, the PSL role. This leads to an enhanced internal profile for the team and greater top-level buy-in
- A clear outline of the PSL function will help differentiate it from other Business Services teams and define the interrelationship between them. For example, where does the PSL role end and the Business Development function start, and what activities are rightly shared?
- The articulation of PSL-specific skills and activities will highlight training needs. Solutions can be developed to support their career progression whilst delivering greater value to the business
- The review also provides an opportunity to clarify and standardise performance measures and reporting lines, which might be inconsistent across practice groups

Common challenges include:

- PSLs can find the hybrid nature of their role difficult to navigate, particularly at the start: they are neither a client-facing lawyer nor a traditional member of Business Services. My view is that rather than being “less than”, they should be seen as “more of”: twice the citizen, having the unique perspective of viewing their practice group through this dual lens
- Many PSLs work part time and are sometimes concerned that a stretching CDF will be difficult to meet within their working schedule. I have found that this can be accommodated through an open conversation prioritising the elements of the role that will deliver the practice group’s objectives
- Titles can be a source of tension. The PSL CDF should have a number of levels. I recommend no more than three. The titles work best when they mirror lawyer titles: Associate = PSL; Senior Associate = Principal PSL (I prefer principal to senior, as most PSLs qualify as senior); Counsel = PSL Counsel. An example of activity progression across the levels can be seen in table 3
- Promotion can be rare for PSLs, as flat structures are still common. Again, I suggest the promotion process mirrors the lawyer path, suitably adapted.
 - A light touch promotion process is usually sufficient for promotion from PSL to Principal PSL. In practice, the timing of step-up to Principal is easy to identify.
 - The promotion to Counsel requires more attention. It should map that of the other Counsel at the firm, so that these professionals are viewed by the partnership and by other Counsel as of equal gravitas and contributing equivalent value.
 - For example, to be considered for promotion to Counsel, in addition to being an exceptional PSL, the candidate should have a business area in which they excel: it could be managing a KM team, being the legal technical expert for their group, being skilled in business development and client relations, technology, innovation or business transformation. Again, this should be agreed with the leadership of the practice group to ensure that it meets their strategic needs.
 - Some firms have promoted PSLs to partner. This is often based on significant legal technical expertise or a prominent client facing role. In a recent move, Mishcon de Reya acknowledged the value delivered by their senior business services personnel (which includes their PSLs), by inviting them to join the partnership.^[ii]

5. WHAT NEXT?

This may seem like a lot of work for a small group of professionals. However, they are business multipliers, such that you should be doing all you can to retain and maximise their services. Developing a CDF will focus those involved on where the greatest impact lies and will reposition the PSL role to meet the strategic needs of individual practice groups and the firm.

The key to *simplicity* is to cherry pick and adapt your existing CDFs to reflect the PSL role. The key to *success* is to communicate the rationale and advantages to those impacted and the key to *senior engagement* is to outline the additional benefits that your more business-aligned PSL group will bring to firm's value proposition.

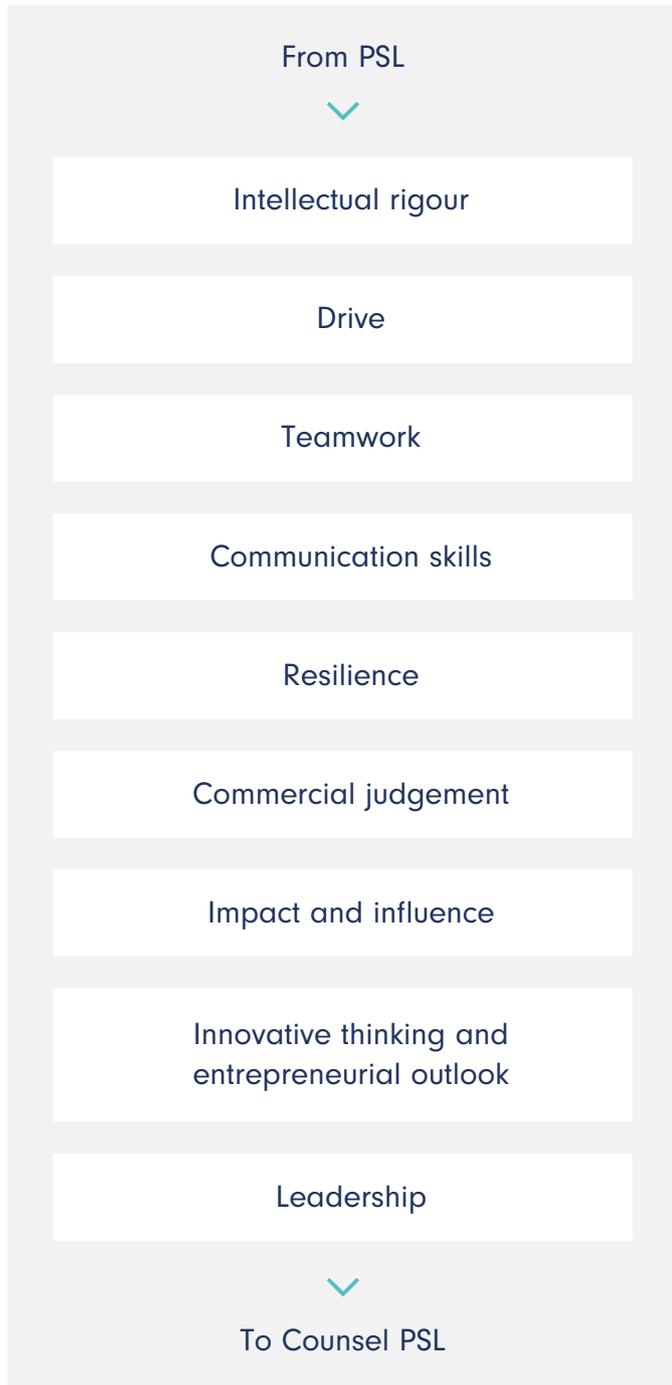
Lucy Dillon

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Email: ldillonconsult@gmail.com

Phone: +44 (0)7712 988 311

LinkedIn: [linkedin.com/in/lucy-dillon-600389b](https://www.linkedin.com/in/lucy-dillon-600389b)

Table 1: Suggested skills for a PSL CDF

Table 2: Suggested activities for a PSL CDF

Professional Excellence
<ul style="list-style-type: none"> • Precedents and guidance • Legal technical queries • Legal training
Client Service
<ul style="list-style-type: none"> • Revenue-generating legal products and solutions • Client alerts, thought leadership and training • Billable work
Innovation and improvement
<ul style="list-style-type: none"> • Innovative solutions assessment • Cost-saving legal process improvement and automation • Tech evangelism
Management
<ul style="list-style-type: none"> • Project management • Risk mitigation • Financial management
People
<ul style="list-style-type: none"> • Team management and leadership • Mentor and support for juniors • Networking, collegiality and collaboration

Table 3: Suggested activity progression using the example of “Revenue-generating legal products and solutions”

PSL	Principal PSL	Counsel PSL
<ul style="list-style-type: none"> Identifies and pursues opportunities to develop knowledge products and solutions Identifies team members to help develop new services, including lawyer and business services experts Drafts legal content for online services Interested and grows confidence in the tech tools suitable for client products and solutions 	<ul style="list-style-type: none"> Thinks creatively about how knowledge and tech can be exploited to deliver new services for clients Works with the legal and business services experts to design optimised workflow and user experience for tech tools Supports client pitches relevant to new legal products and solutions Curiously explores the legal tech market and seeks out new technologies for client-facing tools 	<ul style="list-style-type: none"> Agrees with the practice group leaders which new products and solutions will generate business and create revenue Leads business cases to develop new client-facing services, including market opportunity, competition, risks, cost and pricing Partners with Marketing and the practice group to identify likely client targets in existing and new markets Develops senior level client relationships to support the client’s use of new legal products and solutions Advises partners how to market tech and knowledge products to clients

i [putting-professional-support-lawyers-at-the-heart-of-your-firms-value-proposition.aspx](#)

ii Luke Barr: “From legal director to partner: Mishcon overhauls equity structure” – 10 November 2021, The Lawyer