

## Performance evaluations for paralegals

BY LINDA S. JEVAHIRIAN

A performance review is a methodical way to assess how well an employee carries out a job. Through an objective measure of performance, behavior and goals the process clarifies expectations and identifies roles and procedures.

Paralegals who understand what is important, what they are expected to do, how they are expected to accomplish it, and what the rewards are tend to perform better. Anything less can lead to diminished morale and initiative and, in many cases, job failure.

### Risk management

There is no legal requirement for a performance review although risk management is a motivating factor. A structured format insures that potential evidence is clear and complete in the event of a conflict or resulting litigation. Tracked properly, praise and any needed counseling can be instituted right away.

### Format

Paralegals are generally reviewed one time per year. In a structured atmosphere, the utilizing attorneys fill out forms that rate performance, behavior and achievement of goals.

For example, a scale from one to five might be assigned to performance as being unacceptable, needing improvement, meeting expectations, exceeding expectations, or being superior. In preparation, the attorneys review their personal logs,

## THE LAWYER'S PARALEGAL

the human resource file, billing records, time records, assignment memos, and goals established the previous year.

The evaluation is delivered during a meeting where the paralegal and the attorney discuss the positive and negative aspects of the year's performance. If there are disciplinary actions or changes to be made, a deadline is set after which an amended review takes place and the documentation edited. If the paralegal is to receive additional compensation, perks, or a promotion, they are awarded at this time.

At the end of the review, the paralegal should understand exactly what was discussed, what is expected, the reward for meeting goals, and the consequences if they are not met. Both the attorney and the paralegal should have communicated their comments and ideas as objectively as possible. The discussion should address job performance, not personality. A paralegal should never leave an evaluation with a feeling of uncertainty.

The written review is kept in the personnel file and a copy is given to the paralegal. The attorneys may want to keep copies of their own. The goals for the next year should be accessible in case changes occur.

### Standards and goals

Paralegals work best when performance standards and goals are clear. These are best communicated through a job description, training and orientation. Ideally, the paralegal and attorney discuss this at the start of employment. There should be no mystery when the first review takes place.

Goals drive the year ahead. They are paramount to the success of the paralegal and the growth of the business. Aspirations should be realistic, tailored to individual abilities, and provide for advancement through education and experience, new skills, and involvement in professional associations and community service.

### Performance

Performance is measured by evaluating knowledge and skills, quality and quantity of work, work habits, and communication.

An appraisal of paralegal skills includes the abilities in research, writing, communicating, analyzing, synthesizing, and collecting, organizing and evaluating information. Understanding complex legal issues, working with clients, preparing for and attending trials and closings, and the application of technology are also fundamental. The list will be as long as the job description requires.

Accuracy, neatness, thoroughness, attention to detail, organization, and the ease at which others can access and use their work is a way to

evaluate the quality of a paralegal's work. The quantity of work can be determined by an analysis of billed time, productivity, keeping up with attorney and client work, and managing several tasks at one time.

Work habits are exhibited in planning, organizing, prioritizing, independence, stress tolerance, perfectionism, ethics, anticipation of future needs, reporting, and other behaviors exhibited in a professional and challenging environment.

Communication is demonstrated orally and in writing. How a paralegal listens, responds, drafts documents, negotiates, persuades, argues, reasons and understands concepts are all included in this section.

**Behavior**

Behavioral characteristics include dependability, cooperation, initiative, adaptability, judgment and leadership.

Dependability is demonstrated through monitoring and following through on projects, adhering to deadlines, punctuality, and responding appropriately to instructions and procedures. If excessive absence has impacted productivity an objective explanation should be included.

Cooperation is displayed when paralegals communicate with team members, coworkers, supervisors,

clients, colleagues, vendors, agencies, customer service representatives, and court personnel. Consideration, maintaining rapport and helping others is also included.

Initiative is exhibited by assuming greater responsibility and seeking involvement in professional associations and community projects, such as pro bono work. It can be seen in displays of creativity, inventiveness, being a self starter, and goal orientation.

Adaptability, flexibility and versatility indicate the willingness to adjust to changes in duty, procedure, supervision and work environment. Bringing new ideas and a new approach to work, or responding appropriately to constructive criticism are all tests in this category.

Using sound judgment to analyze problems, determine appropriate solutions and take timely and decisive action is at the foundation of a paralegal position. Thinking logically, strategically, and resourcefully are all measures of judgment.

Many paralegals are team leaders and are responsible for inspiring and motivating others. They demonstrate leadership by gaining the respect of subordinates and team players, selecting staff, defining assignments and overseeing work.

**Conclusion**

The format and content of a paralegal performance review varies from organization to organization. What is important is that a reliable process be created and implemented on a regular basis. This will assure that the paralegals and the lawyers know their roles and responsibilities, and that they have a clear understanding of how to achieve their personal goals, as well as those of the company.

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