

## INVESTOR IN PEOPLE CASE STUDY: DEVON & EXETER LAW SOCIETY



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***“Investors in People has given us the tools to improve the management of our strategy. Our office is central to the growth of the Society which exists to support our members. Our team have a greater focus on what we want to achieve for our members. We look forward with confidence to our bicentennial in 2008”***

***Tony Steiner, Membership Services Manager***

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### Background

**Size:** Five people

**Sector:** ‘Not for profit’ professional support, training and recruitment

**Location:** Exeter

**Status:** Recently recognised as an Investor in People, working with standard since February 2006.



INVESTOR IN PEOPLE

### The organisation

Founded in 1808, the not-for-profit organisation promotes and supports the legal profession in Exeter and Devon with a membership of 890 solicitors.

As well as running specialist training programmes in legal and management topics, the Society acts as a recruitment agency for fee earners, practice managers and paralegals. Additionally, as one of 120 local law societies in the UK - and operating independently from the national Law Society - the office mediates in disputes between solicitors and clients and runs social events for its members.

Run by just three core staff and a part-time secretary and treasurer, Devon & Exeter Law Society has a mission *“...to help members become the first point of contact for the local community seeking cost effective, user friendly, quality legal services.”*

As the first local law society in the country to achieve Investors in People, the organisation actively encourages the programme, together with Lexcel, the national Law Society’s quality mark for law firms, which is also assessed by Quality South West.

### The challenge

On committing to Investors in People, the Society was told by its adviser that “there were good things in place, but that nothing was formalised.”

With increasing demands upon its services, the long established society needed formal structures to help manage its growth more effectively and to meet the challenges of 21st century commercial life.

“Before Investors in People, nobody had ever looked at our processes from outside,” says Membership Services Manager Tony Steiner.

## The strategy

Devon & Exeter Law Society began its quest for a more structured approach by calling its three staff and two officers together to meet “away from the desk” for wide-ranging discussions about training and operational issues. The team looked at its key performance indicators to examine where the organisation needed to make improvements. The five now meet weekly and quarterly and are fully consulted on the planning and future direction of the business.

The Society also introduced a system of 360-degree appraisal which means that officers not only appraise staff, but are appraised by staff.

“It’s one of the benefits of not having a hierarchical structure,” Tony Steiner says.

“We are able to say to our officers, ‘We think you should be doing this better...’ and they can then go away and make the improvements.

Most critically, the Society began using skills matrices to identify individual gaps in knowledge in order to ensure that training is properly targeted towards the business needs of the Society.

“Skills matrices were a revelation to us,” Tony says.

“In the range of tasks carried out in the office, we were suddenly identifying areas where people had no knowledge. One or other of us would be doing the same task, day in, day out, without realising that colleagues hadn’t learned it – or had forgotten how it was done. We’ve therefore identified skills gaps and have been able to address them through training.”

The Society has focused particularly on IT training and now has a written strategy in place. The Society also intends to introduce marketing training for all of its team.

A formal induction pack has been introduced. Recently recruited office assistant Lydia Vanstone, for example, has been quickly acquainted with the Society’s processes and procedures and is now successfully absorbed into the office team.

## The results

The Society has increased its annual turnover year-on-year for a decade and expects to report a significant increase at the end of its current financial year. This means a greater investment in services to members. Key Performance Indicators are moving noticeably upwards, as more solicitors and law firms buy into the Society’s services.

The team have gained in knowledge and confidence, particularly in the use of software packages. Training has helped them to manage the process of change and to work more closely together. The open and inclusive style of management has helped everyone to gain a greater awareness of their role in the success of the business.

The five now plan a further ‘away-day’ to look at recommendations in the assessor’s report and to examine the Society’s further potential for growth and development.

“The strengths are within us” Tony Steiner says.

“We have done it ourselves and enabled it to happen. We will continue to go from strength to strength.”