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The Road to Becoming a CCLS

BY VIVIAN SHREVE, CCLS – SUBMITTED BY SANTA CLARA CO. LPA

I have been in the legal field for my whole life – literally! My step-father was a criminal defense attorney and my mother was his office manager, so I have quite literally grown up in the legal field.

I've worked in the areas of criminal law, bankruptcy, insurance defense, unlawful detainer, family law, civil litigation, patent prosecution, and ultimately IP and securities litigation, which I've been doing for the last 9 years. I've always had a good bit of confidence in my ability and my skill set. But a few years ago, I heard about something called the California Certified Legal Secretary exam. I started doing some research and thought "Shoot, I've been in this field my whole life; I should be able to do this!" Then I talked to a former secretary in my office, who happened to be a CCLS. She encouraged me to go for it and told me about the study groups. So, I started really considering it. I joined Santa Clara County LPA, admittedly so I could get the benefit of the discount on the study materials and exam. Once I got the materials and started to study, I questioned myself and thought "WHAT HAVE I GOTTEN MYSELF INTO?!" But, alas, it was too late to turn back now. You see, in all of my excitement about the exam, I told everyone at work that I was studying and that I'd be taking the exam. I was actually able to get my employer to agree to reimburse me for the materials and exam fees if I was able to pass. NO PRESSURE, right?

So, I studied. I studied flash cards at lunch time; I attended the online study group every week; I read all of the materials; I studied the Gregg Reference Manual; I had people quiz me; and I had the attorneys in my office spouting all kinds of legal terminology at me. For 12 weeks, if I had a free minute, I was doing something related to the exam.

Now here it is, EXAM DAY! To know me is to know that I am one of the world's great sleepers. I love to sleep in on Saturdays - but not this Saturday. I was up early and driving from San Jose to Burlingame so I could be sure to be there by no later than 7:30 for the 8:00 start time. After the first section was done, I called my husband and told him I'd be back up in Burlingame for the next test session because I thought there was no way I was going to pass. I finished the exam and on my drive home, really not having



any idea how I did on the exam, I felt so completely worn out, but at the same time I was somehow invigorated. I knew I had done all I could to prepare myself and I had done all I could on the exam. And not only that, but I felt that I had taken a huge step in trying to advance my career.

The next several weeks were excruciating for me. I checked my email every chance I got – morning, noon, night – waiting for the results. So finally, just before Thanksgiving, I'd been at a food sort at the local food bank, sorting apples and oranges all morning. Upon returning home and checking my email, there it was – CCLS CERTIFYING BOARD. The results were in. I started to shake and I could actually feel the blood racing through my veins. I was so excited, so nervous, so anxious. I open the email and the first word I saw was CONGRATULATIONS. I screamed! My husband and kids came running in to see what was wrong. They found me jumping all over the house screaming "I did it! I did it! I passed!" They never had any doubt. I emailed my bosses and told them. They also never had any doubt. I think I was the only person who ever had any doubts. I jumped around so much that I ended up hurting my sciatica and ended up in the emergency room.

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Since taking and passing the exam, my career has been completely different. I received a huge amount of respect from my coworkers, bosses and colleagues. I have been getting better raises and bonuses. I get to travel with my attorneys for trial, which I love doing. I have much more responsibility in my office and have become a go-to person when people have questions or need help with projects. I've been asked to assist with interviewing candidates and training new hires. Not to mention the fact that before even getting my results, I was asked to run the study group for the next sitting of the exam. I became the CCLS Chair for Santa Clara County LPA and am very proud to say that everyone that studied with me in the study groups has also passed the exam. At the same time, I also became the Continuing Education Committee Chair, which is a position I never thought I'd be ready for. But we've had some very successful workshops.

A LEGAL SECRETARY'S PERSPECTIVE

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related correspondence to clients and opposing counsel for the signature of the attorneys. While there may be many secretaries who handle these types of duties and perhaps more at their positions at large law firms, it is far more common at small and mid-size firms.

Another example of working at smaller to mid-sized office environments, is it allows me to know exactly whom it is that provides myself and my fellow employees with our paychecks. Seeing them daily, exchanging polite chit-chat and looking into the eyes of the partners who sign my payroll check every two weeks is something that gives me personal satisfaction, as I take pride in my work and can face the bosses on a daily basis with dignity. Also, the dress code in a smaller environment is typically more relaxed and informal.

Let us compare what I described in the above paragraphs with working at a large firm. As you know there are many benefits to being an employee of a firm with much prestige. One obvious benefit is a high pay rate. A high salary with generous benefits and perks is immeasurable in its value to an employee. Another is the recognition and respect in knowing that you have been accepted to work at a national or international firm. A good feature in working at larger firms is that the secretary is in a position to delegate work to numerous staff members including calendar clerks, mailroom staff, and other important legal professional staff often referred to in general, as "office services." Many large firms will also find you at a five star hotel for the holiday party, sometimes a paid trip to the parent office in another state, along with a limousine ride to the hotel. Furthermore, large firms offer days of orientation and formal training for their employees.

To sum it all up, the CCLS exam was by far the hardest thing I've ever had to study for. I often tell people it is the hardest exam a non-attorney professional will ever have to take. It is like studying for the LSATs or the Bar exam. But passing it has made it all worth it. My confidence level has skyrocketed. The respect that I get from my employer and co-workers has been amazing. The opportunities that it has opened up for me have been incredible and I've gotten more job offers than I can count. In this day and age, knowing that you are a little more marketable goes a long way. I'm not worried about my job here right now, but I've survived several rounds of layoffs. Having the CCLS helps me to know that if something should happen and I lose my job here, I know that I can go elsewhere and have no problem finding another job. CCLS looks great on your résumé.

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Do be prepared to wear your best office attire on a daily basis, except on Fridays because many large firms offer what is known as casual Friday, when you can wear a nice top, shoes and a pair of your best jeans.

Finally, when it comes to year-end reviews, a large firm typically utilizes a computer-generated survey, which is passed around to each attorney that you support resulting in an overall rating based on the input of each attorney who filled out the survey. The review process at a small firm, if any, is casual and closer to a year-end conversation or a brief hand-written appraisal for the file. In my opinion and experience, no news is good news, and you will certainly know that you are doing well if you do not hear complaints.

By working at a field or branch office, you can have the benefits of both law office worlds; the hands-on experience and personal congeniality I describe at a small to mid-sized office, as well as the monetary benefits and rewards of the large firm. This is because the field office will be typically smaller in size but the parent office is typically large in size, allowing you to have many of the perks and benefits of a large firm with the more casual and informal atmosphere of a small firm.

Of course, not all offices will be exactly the same. This article only touches on certain aspects from my standpoint. I did not mention working for a sole practitioner, which would mean two things: you and the lawyer. A two-person office is another thing entirely. Expect to be all things to all people in that type of set-up. That said, no matter where you end up (large, mid or small office), know that all experiences are learning experiences that you can take with you to the next opportunity.

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