

Continuing professional development

Example needs analysis and training and development plan

Education & Training Unit
Version 1

Unplanned training and development activity is very unlikely to bring the maximum return on your investment in terms of time and money.

The Solicitors Regulation Authority (SRA) encourages all solicitors to plan their training activity and to tie in individual training and development needs with those of the firm to meet business objectives. Those solicitors working in firms holding the Investors in People Award will be familiar with this approach.

The following is an example needs analysis and training and development plan for a solicitor with four years post-qualification experience.

Download [blank forms](#) for use in devising your own development plan.

Profile

Solicitor in medium sized firm with four years' post qualification experience

A solicitor with four years' PQE specialising in health property matters, in particular the development of primary health care premises in central London through "Red Book" funding (statement of fees and allowances for GPs). There are currently opportunities for the solicitor to participate in seminars which the firm offer to clients, to write articles on legal issues in this area and to take part in teaching sessions for junior professional staff. The solicitor works on transactions and projects involving professional staff from a number of departments in the firm as well as with other solicitors in her own group. She hopes to be considered in the next two years for promotion to an Associate; that position would entail some supervision and management of junior staff in her department.

Example analysis of development needs

Section A - Strengths

Performance in Key Result Areas	
Key result area	Strengths
Four years' successful PQE in specialist area of law	
Additional skills and knowledge required - development needs	
Further development of specialist knowledge to highest level, in particular in law relating to rent review, property and landlord's repairing covenants.	

Section B - Weaknesses

Performance in Key Result Areas	
Key result area	Improvements required
Team working	More effective work as a team rather than group of individuals.
Legal knowledge (potentially)	Currently good, but danger of becoming outdated at this point in my career.
Blockages/Obstacles that arose from external influences	
Extended period of illness.	
Additional skills and knowledge required - development needs	
Knowledge of team working in theory and in practice.	
Specialist legal knowledge - formal update required.	

Section C - Opportunities

Opportunities	
Options	Action required
Possible progression to Associate with some supervision/management	Prepare self with skills of supervision/management of staff.
Participation in client seminars	Further develop presentation skills - particularly to non- technical audiences.
Writing articles on legal issues	Course specifically for lawyers on article writing and practice in-house.

Section D - Threats

Threats	
Potential changes	Action required
Role requiring a greater management input - lack of formal training.	Assess management skills and undertake appropriate development.
Changes to nature of primary health care in London.	Bring self up-to-date and develop commercial awareness of sector.

Example training and development plan

Development Activity	Knowledge and/or skills to be developed	Priority	Development strategy/methods	Providers	Start date	End date
Develop commercial awareness	Commercial update on issues relating to the future of primary health care in London	High	External course	7 hours	11/03	11/03
Update knowledge of rent review law	Knowledge of current practice and latest case law	High	Internal seminar	Firm 1 hour 15 minutes	10/03	10/03
Management Training	Team working skills	Low	Specialist external course "Building Effective Teams" for lawyers	External - bespoke for firm 8 hours	5/04	5/04
Update knowledge of property tax law	Knowledge of latest cases and general update	High	External seminar: Commercial property transactions - taxation aspects	3 hours	12/03	12/03
Presentation skills	Presentation skills	High	(1) Course: Presentation Skills (2) Participation in client seminar on taxation aspects of commercial property transactions	(1) External course - bespoke for firm : 8 hours (2) Preparation: 4 hours; Delivery: 1 hour	11/03 1/04	11/03 1/04
Management Training	Supervision and management of staff skills	Low	Course: Effective People Management	External 6 hours	Summer 2004	Summer 2004
Develop writing skills	Article writing	Medium High	(1) Course: Article Writing for Lawyers (2) Writing article for firm's Health Law Bulletin re development in property law	(1) External - 2 hours (2) Preparation and research: 6 hours 30 minutes	12/03	1/04 onwards
Update knowledge of Landlord's repairing covenants	Knowledge of current practice and update on case law	High	Internal seminar	1 hour 15 minutes	1/04	1/04
Update knowledge of commercial property law	Knowledge of latest cases and general update	High	Internal seminar	1 hr 15 minutes	2/04	2/04