

Certified Manager of Reporting Services

A Job Analysis

The following job analysis was prepared by a task force of subject specialists, including managing reporters, court managers/administrators, and a management consultant. It consists of ten major domains:

10	Planning
20	Organizing
30	Leadership
40	Human Resource Management
50	Controlling
60	Finance
70	Communicating
80	Education
90	Technology
100	Marketing

10 Planning

Creates the future; predetermines a course of action; identifies a series of events to accomplish a purpose within the organizational unit. Sets general long-term and short-term goals to accomplish the purposes of the organizational unit. Constructs tasks and activities, drafts action plans, and establishes responsibilities for reporting staff, office staff, and other unit personnel. Defines and writes job descriptions by identifying and analyzing job specifications in order to best match the applicant to the position.

Develops comprehensive budgets for specific tasks in order to execute the action plans and attain organization goals by using generally acceptable accounting principles and by standard organizational practice. This is accomplished by identifying and accumulating specific costs of each activity. Identifies the variables that create/constitute priorities and applies them to the achievement of defined goals by structuring tasks and activities based on available resources, including personnel and equipment, time constraints, budgetary impact, and other factors. Determines the time requirements for each task and arranges them to accomplish action plans in sequence, on time and within budget by analyzing resources available. For example, calculates how long it takes to do each task, by whom, and with what equipment. Adjusts the schedule accordingly, using methods such as flowcharts, generally acceptable accounting principles, charts, timelines, and the like.

KNOWLEDGE OF:

- K-1 Action plans
- K-2 Job specifications
- K-3 Budgeting
- K-4 Timeline techniques (flow chart)

SKILLS INCLUDE THE ABILITY TO:

- S-1 Set goals (long- and short-term)
- S-2 Draft action plans
- S-3 Define job descriptions
- S-4 Prepare budgets
- S-5 Set priorities

20 Organizing

Defines relationships among people, tasks, and activities to accomplish goals. Creates communication and authority relationships among reporters and other staff to accomplish goals. Assigns necessary authority and creates appropriate responsibilities within the organizational unit by delegating. Clarifies organizational relationships, tasks, and activities by depicting job positions and hierarchical structure in an organization chart for reporters and other staff. Clusters like or similar tasks to create specific jobs to execute action plans that accomplish goals. Clustering is achieved by evaluating the need for performance of specific tasks and bringing tasks that require comparable or related skills into one job.

KNOWLEDGE OF:

- K-1 Relationships and contributions of reporters and other staff
- K-2 (And understanding of) tasks to be performed and how they interrelate
- K-3 Special formats and requirements/requests

SKILLS INCLUDE THE ABILITY TO:

- S-1 Cluster activities
- S-2 Identify reporting relationships (authority)
- S-3 Create an organization chart
- S-4 Standardize all procedures

30 Leadership

Creates and communicates a vision of the unit's contribution to the overall mission of the organization, guides reporters and other staff through to ultimate goals, i.e., directs, organizes, supervises, and assigns a group of court reporters, court monitors, and support staff; supervises, trains, evaluates, motivates, and disciplines court reporters and other staff; ensures compliance with established rules and procedures for court reporter services regarding scheduling, transcript production, and objections filed by attorneys pertaining to inadequate transcripts and logs produced by reporters and other staff; enforces the timely and accurate filing of transcripts and compliance with all appellate and local rules as pertains to the production of transcripts; approves and justifies requests for extensions.

KNOWLEDGE OF:

- K-1 Abilities of the reporters and other staff members
- K-2 Backlogs and significance thereof
- K-3 Importance of meeting deadlines
- K-4 Motivational techniques

SKILLS INCLUDE THE ABILITY TO:

- S-1 Direct the efforts of reporters and other staff
- S-2 Schedule and assign work
- S-3 Apply motivational techniques
- S-4 Interpret policies, procedures, and trends
- S-5 Anticipate the effects of trends and changes in the environment
- S-6 Coordinate the activities of reporters and other staff (such as in photocopying, binding, invoicing, preparation of form letters, payroll,

recordkeeping, telephone messages, appointments, transcript orders, interpreters, video and other technical and special orders, assignment of conference rooms, filing deposition notices, checking for accuracy, calendaring, telecommunications, computer backups, preparation of Disc-ZX, ASCII, condensed transcripts and indexes, reporter referrals)

S-7 Facilitate, including creating an agenda, conducting meetings, and removing obstacles to goal achievement

40 Human Resource Management

Identifies, selects, trains competent people for positions in the organizational unit; prepares and maintains statistical data with regard to reporter productivity and documentation of hours spent in court and out of court/in depositions or workplace by court reporters and other staff.

KNOWLEDGE OF:

- K-1 Recruiting techniques
- K-2 Hiring practices and techniques
- K-3 The orientation process
- K-4 The training process appropriate to the needs of the members of the organizational unit
- K-5 Performance standards
- K-6 Knowledge of performance evaluation
- K-7 Promotion standards
- K-8 Termination policies and procedures
- K-9 Conflict management and dispute resolution
- K-10 Laws relating to conditions of employment

SKILLS INCLUDE THE ABILITY TO:

- S-1 Select employees (interviewing, testing, assessment)
- S-2 Interpret, prepare, implement employment contracts
- S-3 Orient new staff members
- S-4 Develop and implement performance standards
- S-5 Conduct performance evaluations
- S-6 Discipline (behavior modification, corrective action plans)

50 Controlling

Ensures progress towards goals according to plans (quality control).

KNOWLEDGE OF:

- K-1 What constitutes good performance
- K-2 How to measure good performance
- K-3 Methods available or appropriate corrective actions

SKILLS INCLUDE THE ABILITY TO:

- S-1 Establish and communicate objective standards of performance
- S-2 Objectively measure and compare performance to standards
- S-3 Define and implement corrective actions as necessary

60 Finance

Manages the financial resources of the organizational unit: prepares and maintains statistical data with regard to reporter productivity and documentation of hours spent in court/in depositions/out of court/in the workplace by court reporters and other staff; prepares budget; prepares and maintains inventory of equipment and software utilized by reporters and other staff.

KNOWLEDGE OF:

- K-1 Basic financial statements
- K-2 Financial analysis
- K-3 Capital budgeting techniques
- K-4 General budgeting; accounts receivable and payable
- K-5 Accounting principles
- K-6 Cash flow management
- K-7 Payroll/compensation and benefits
- K-8 Fiscal responsibility
- K-9 Billings and collections
- K-10 Inventory control
- K-11 Procurement procedures

SKILLS INCLUDE THE ABILITY TO:

- S-1 Perform accounts receivable/payable duties such as rebilling, making collection calls, dealing with professional collection agencies, filing suit
- S-2 Keep records
- S-3 Identify and budget for the professional services of accountants, attorneys, bankers, and insurance agents

70 Communication

Transfer information and understanding through written and verbal mediums. Informs people about what the organizational unit does and how it does it to educate them about reporting products and services by making presentations (speeches, reports, press releases, interviews, proposals). Disseminates information using various methods of verbal and nonverbal expression to promote understanding among members of the organization unit through meetings, presentations, training, disciplines, workshops, conferences. Uses the method most appropriate to the message. Creates an environment of cultural awareness by educating reporters and other staff on the requirements of the law and the general conventions of society by conducting sensitivity training, providing appropriate reading materials, and reinforcing professional behavior. Resolves conflicts among reporters and other staff through compromise, collaboration, arbitration, and mediation to create a positive professional work environment.

KNOWLEDGE OF:

- K-1 Public relations
- K-2 Written, verbal, and nonverbal cues
- K-3 Sensitivity training
- K-4 Conflict resolution
- K-5 Stress management

SKILLS INCLUDE THE ABILITY TO:

- S-1 Interpret written, verbal, and nonverbal cues
- S-2 Make presentations
- S-3 Conduct sensitivity training
- S-4 Make proposals
- S-5 Conduct meetings
- S-6 Inform (write, speak, perform)
- S-7 Moderate/mediate/referee disputes and resolve conflicts

- S-8 Analyze and improve work habits and skills
- S-9 Handle complaints and problems with clients
- S-10 Engender team spirit and motivation
- S-11 Write and disseminate understandable (clear and concise) memoranda regarding changes in rules and regulations, new technology and services, reference and source materials recently purchased and available, backlogs and due dates for transcripts and regarding production problems.

80 Education

Serves as an educator and role model for court reporters and other staff by assisting and instructing in all aspects of court reporting services; supervises, trains, evaluates, motivates, and disciplines court reporters and other staff; implements through training and other sources new reporter technology in the courtroom and deposition place as relates to computer-aided transcription and additional services requested by court and counsel.

KNOWLEDGE OF:

- K-1 Juridical organizations
- K-2 The use of ancillary services
- K-3 Training and internship programs
- K-4 Ethics, the NCRA Code of Professional Conduct, etc.
- K-5 Local, state, and national professional reporting associations
- K-6 New developments involved in making (preserving) the record
- K-7 Confidentiality requirements
- K-8 Equipment acquisition and maintenance
- K-9 The responsibilities of the reporter to the court, counsel, colleagues, and the public, including, but not limited to, punctuality, timely delivery of transcripts, courtesy, dependability, impartiality, and timely response to oral and written communications
- K-10 Methods of fulfilling continuing education requirements
- K-11 Rules and regulations regarding special needs groups, e.g. Americans with Disabilities Act (ADA)
- K-12 State and local notary laws, transcript formats, appellate rules (state and federal), telephone and interpreter depositions, work product, all deposition and court rules
- K-13 Written office procedures manual, where applicable

SKILLS INCLUDE THE ABILITY TO:

S-1 Teach, train, instruct, communicate

90 Technology

Implements technology in the court system and/or reporting deposition workplace as it relates to computerized and additional technological services as requested by court and/or counsel.

KNOWLEDGE OF:

- K-1 CAT systems and the various/latest software applications
- K-2 Support and ancillary systems
- K-3 Archiving
- K-4 Modems
- K-5 Video, stenomasking, audio recording, realtime and closed captioning, teleconferencing, conference calling for the telephone depositions and court hearings
- K-6 ASCII, DISC-ZX, CAT-Links, Summation, Video-ZX, condensed transcripts and indexing; photocopying (black and white or color; blueprints, etc.); realtime, on-line, closed captioning, daily copy, conferences and conventions, interpreters, referrals, and like knowledges

SKILLS INCLUDE THE ABILITY TO:

- S-1 Supervise data backups
- S-2 Supervise recordkeeping
- S-3 Supervise archiving note storage and retrieval systems
- S-4 Supervise maintenance
- S-5 Attend and assimilate vendor seminars, meetings, and exhibits
- S-6 Develop RFPs for technology needs

100 Marketing

Develops and implements strategic marketing plans to promote the use of reporting and ancillary services to the legal community.

KNOWLEDGE OF:

K-1 Present and future markets

K-2 Technological trends

K-3 Promotional methods

K-4 Competitive forces

SKILLS INCLUDE THE ABILITY TO:

S-1 Research, analyze, and implement marketing trends

S-2 Develop and disseminate promotional communication material, both oral and written

S-3 Budget for marketing plans

S-4 Mesh reporter services with potential client needs

S-5 Identify target customers and needs