Why Rollouts Are a Training Issue

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The very word "rollout" brings angst to even the most seasoned IT trainer. No matter what new software or system is being installed, the transition process can be stressful, confusing, time-consuming and expensive. You are responsible for making sure that all those who need training receive it in a way they understand and that they can apply to their jobs. You are probably also responsible for building enthusiasm for the new program and for overcoming employees' natural resistance to change. All of this may sound daunting, but it doesn't have to be.

A successful software rollout can be one of the most exciting times in your career as a training professional. It can be full of opportunities to show your abilities to guide user adoption, from the new hire orientation to the obligatory ongoing training programs.

Today, it is not uncommon for a law firm to roll out several different tools in the same year. Major changes such as updates to Microsoft Office or changes in document management tools are certainly not as frequent, but small rollouts of products such as Meeting Room Manager, Digital Dictation, Adobe Reader, PDF Docs, multipurpose copiers and scanners, time-keeping tools, BlackBerrys, metadata tools, collaboration and comparison products, and all the necessary practice-specific tools available to our industry are taking place several times a year. Add shrinking classroom time and resource constraints to all of this, and it is no wonder IT trainers cringe at just hearing the word "rollout."

The Planning Phase

Ten years ago, project management was rare within the walls of a law firm, but today, it is rare that a rollout takes place without it. From defining the tasks and determining dependencies, to anticipating the risks and scheduling the resources, project management is designed to get all players on the same page and keep them there.

In the best rollouts, the training department is involved from the very beginning with the design of the new system to testing and scheduling. In order to create a successful training plan, the training department must know how the legacy software works; how the new software works; be aware of any deficiencies, changes in processes or workarounds needed; and be involved with planning the pilot and rollout schedules.

Setting Training Goals

When rolling out new software, you must be able to answer the question, why are we doing this? The reason for the software change or upgrade must be aligned with the firm's business goals, such as better client services, decreased risk or an increased productivity. Linking the training goal to the firm's overall goals will help management and the user community to buy in to the new change.

One of the primary goals training staff should have for users is to minimize productivity loss associated with the software transition. This means you have to quickly get your user community up to the skill level required to do their jobs at least as quickly and as accurately as with the old software. Then, in the next phase, you want the software to help users do their jobs even more quickly, accurately and securely than before.

It's important to be realistic about the time frames in which you expect to accomplish these objectives. These time frames will depend on the complexity of the new software as well as the number and current skill levels of users who need training.

Upgrading to a new version of an existing software program can present special challenges. Training might be expected to proceed more quickly because users are already familiar with a previous version; however, if there are many changes in the new version or if it has a very different interface (such as the Ribbon in Office 2007 that replaced the menus and toolbars in previous versions), users may actually find an upgrade more difficult than switching to a completely new software package.

High-impact rollouts, such as moving to Office 2007 or changing your document management system, require crucial decisions up front. Perhaps the most important decision is determining if the rollout will be a flash cutover or staged deployment. Changes to document management systems often use the flash cutover approach because of the complexity of having documents in two different repositories.

For flash cutover rollouts, you need more resources (classrooms, trainers, helpdesk analysts, floor support folks) for a shorter period of time. All users are trained in the days prior to the cutover date. The high number of people being trained and the requirement to keep the training as close to the cutover date as possible means that classroom time will be short, often not enough to give users the amount of hands-on practice they would prefer. The shortened classroom time also will limit how much conceptual information can be presented and discussed. For these reasons we recommend that you provide several pretraining informational sessions that will both raise awareness and provide a forum for discussion.

Whether your firm is planning a gradual rollout of new technology or a flash cutover, you will need to start thinking about learning content and training methods.

Identify Learning Content

With rollouts hitting desktops faster and faster each year, keeping your training materials current can be a daunting task. Creativity is required to address shortened classroom times and the variety of learning styles.

Because learners can and will learn in a variety of ways, you should structure learning content in such a way that learners can get to it when they need it the most. For classroom-style learning, this would be a training guide complete with class exercises led by an instructor. Quick-reference cards should be provided so that users can review the same information back at their desks. For learning at the desktop, e-learning nuggets are often a preferred method. When seeking information, users will often access Help tools or call the helpdesk. Helpdesk analysts should reinforce what is being taught "in the moment" by following up with a link to the learning content via an e-learning module. For self-paced learning, training guides with exercises to reinforce concepts work well. In all of these examples, the content is the same, but the delivery method varies.

Creating good training content in a variety of forms can be time consuming. Consider purchasing content from a trusted training vendor. No two law firms customize products the same way, and training materials should be tailored for your firm's environment.

Raise Awareness

One of the first steps in any rollout is to raise awareness. Provide users with good information before they see the new software. Awareness content should always have an informative tone. The goal is to shift users' attitudes away from viewing the change as a necessary evil to enthusiasm about what the upgrade will enable them to accomplish. Have your communications group develop predeployment marketing materials. Tie together all of your communication tools with your learning tools, and consider the collection to be a consolidated learning plan for your rollout.

Use the "Rule of Three," which suggests that things are more compelling when presented in threes, when communicating to users. Pair a message from the executive committee regarding the business reasons for the change with an e-mail from the IT department highlighting the timing of the rollout. Include a technology commercial that shows a bit of what the new software will look like.

Road shows and "wow sessions" are common during this phase of raising awareness. The timing of the road-show sessions should be a couple of months prior to the rollout itself. You should have a pretty good idea of what the new desktop will look like and have the software customization as close to final as possible. Kick off the road show with an introduction from the firm's management. This will ensure that all users know that this change is well supported by management. Set the expectation that participation in the learning opportunities will help make the transition easier. Show off a bit of the technology and answer any questions. Have the rollout schedule available and explain the process for signing up for any training offerings.

When scheduling these events, don't expect your attorneys to come to you; you need to go to them. Shorten the software demonstration part of the session so that you can get your message across in just 20 to 30 minutes, and make it even shorter for partner groups if possible. Allow time for discussion, and ask for partner support in getting the staff enrolled in training. For the staff, plan for an hour-long session, including time for discussion. Any pushback should be handled during sessions with management so that these issues do not use up precious classroom time.

Provide Prelearning Opportunities

One of the most popular uses of learning content, and a way to supplement the shortened classroom time, is to introduce new concepts and terminology before classroom instruction begins and the software is pushed to the desktop. Short, targeted e-learning pieces will go a long way in providing users a basic idea of what the new software will do for them and what it will look like. In many of our document management rollouts, prelearning proved to be very beneficial, particularly with matter-centric concepts. When users participated in prelearning activities just a few days prior to classroom training, they entered the classroom with a clear understanding of what they could do with the new technology. This allowed trainers in the classroom to focus primarily on the "how-to" part of training and give users the necessary hands-on experience.

During the training phase of rollout, the goal is to minimize disruption. While it is not possible to get all of your users up to speed with new software in an hour or two, it is often all the time we have. So while users may not be able to absorb all the new features in that time, they should be able to use the new version to perform basic tasks. Content covered in rollout training focuses on the "what's different" or "what happened to . . . ?" categories.

Make Training Memorable

Your students are investing their time in the training you're providing them. For that investment to pay off, it's up to you to make sure they remember what they've learned once they return to work. Use the four steps of the training map shown here to help your users retain and use their new skills on the job.

Training Map

- **Phase 1: Make connections.** Connect what learners know today to what you are about to teach. For example, in a matter-centric rollout, we would relate the knowledge of the profile form to the properties of the document folder. In an Office 2007 rollout, the learners will already be familiar with many of the features of Word 2007. By connecting instruction on new features to what they already know, your learners will be more relaxed and ready to learn what's new.

  During the connection phase, you will also want to connect learners to each other. Open the session with questions that start with the phrase, "how many of you have . . . ?" This allows users to share their experiences and connect with each other in a learning community. Learners will then be more willing to share their experiences with each other outside the classroom as well.

- **Phase 2: Explain the concepts.** During this part of the training, the learners are watching as you explain and demonstrate the methods of using the new software or process. You will go through the process once as they watch and then a second time as you guide them through an exercise. Hold their attention, and make learning fun with activities that keep the students focused and involved. When possible, use props and visuals to explain key concepts.

- **Phase 3: Practice the skills.** Practice exercises give users the opportunity to use the concepts they just learned and commit that information to long-term memory. This is especially important as staff need to feel confident in their abilities to perform once the software hits the desktop. Incorporate focused, real-world examples into your training as often as possible. The material being covered must be relevant and meaningful.

- **Phase 4: Celebrate the learning.** Use praise to reinforce user confidence and commitment. Provide your users with the steps they need to follow once the new technology is available on their desktops. Offer a reward or prize for going the extra mile. Continue the celebration of learning during the post-training floor support phase.

Post-Training Learning and Support

One of the risks in a software rollout is that the users will not have the opportunity to start using the technology immediately upon receiving training. For that reason, you should plan for trainers and subject-matter experts to be on hand immediately after deployment to provide targeted floor support. Because the floor support team is skilled at getting users to engage in activities that will reinforce what was taught in the classroom, they become critical to rollout success. Armed with checklists, logs and floor maps, these folks will provide 15 to 30 minutes of individual attention to every user within a day or so of the deployment of new technology. In the event that a user did not attend the classroom training session, the floor support resource will either provide the just-in-time training to get the user started with the new software or sign the user up for a makeup class.

Your floor support team should go through a series of steps on a checklist to make sure the technology is working as it should and that the user is encouraged to try the new techniques. If a problem with the software is discovered, the floor support resource will pass that information on through the proper channels and then follow up to make sure it is resolved. Once resolved, the floor support resource returns to the user desk to continue support. The checklist will cover all the "do you remember how…" and "show me what you do when…" steps that push the user to try and apply what is taught in the classroom. Don't forget to praise the user and celebrate the learning that is happening post-deployment.

Understand, too, that the training department no longer exclusively controls learning. Training can live at the desktop and be controlled by the learner. Informal learning encompasses as much as 70 to 80 percent of learning in firms today. Informal learning includes asking someone for help, poking around the software trying to learn something on your own and using self-help resources and reference materials.

Learning should not be limited to the confines of a classroom. However, new self-directed learning strategies carry a greater risk of failure if not managed properly. You must understand how best to influence and monitor the learning that you once controlled very closely.

Training will become less about designing, owning and disseminating content, and more about enabling, guiding and supporting learners through the many informal options they have for acquiring and applying content. Because of this, it is crucial that you provide refresher learning at various points. E-learning is a great way to reinforce the concepts taught in the classroom. Provide group-specific learning plans that will review the concepts and how-to steps covered during the hands-on classes. Tracking the learning plans in your learning management system will give you an opportunity to see at a glance where your learners are on their learning plans. Encourage those who are not participating so that productivity doesn't take a nose dive.

Don't forget to celebrate the success of your rollout. Have a wrap-up meeting that includes your entire IT staff and your vendor. Review the goals you set at the beginning of the project and recognize individual contributions to the project's success. Acknowledge where things went wrong and discuss the lessons learned. Finally, share your success story with your peers at ILTA.

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