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:: Focusing User Support and Training

At the Practice Group Level

There is growing interest in our industry toward a radical change in training philosophy. It is moving away from "one size fits all" training to an approach that focuses on each practice group within the firm and the particular needs of that group. The focus also shifts from "training" to "learning." The word "training" implies teaching a specific skill to an individual or group in a traditional classroom setting, and the trainer's time is frequently consumed by training details (curriculum, classroom setup, time scheduling, etc.). Learning focuses on a partnership between educator and learner, it is more individualized, and the desired outcome is to impact the learner's work habits and productivity positively.

Before diving into this new approach:

Start slowly. Select one practice group or practice area. Pick an area where you have a good relationship with the users, or pick a practice group that is already supportive of technology and understands how they can use it to improve their practice. Identify the practice group head who is willing to motivate his or her group to work with you.

Encourage learning in practice groups. Design training/education for all members of a practice group: partners, associates, assistants and secretaries. You may need to change your thinking and processes from training-specific to learning-focused.

Redefine the role of the training professional. Not only is there a need for a new approach to technology training, it may be time to rethink the role of the training professional.

Effecting Change – Getting Management Buy-In

To effect a change to a practice group learning focus, the training and support professionals must first develop goals and possible positive outcomes. Then they must "sell" these outcomes to management to gain support for the change.

Some possible goals and outcomes might be:

Spend less time producing quality documents. Better document production skills will lead to faster and more accurate first drafts of legal documents.

Spend less time searching for e-mail content by using a better repository for shared electronic communication. As long as attorneys bill by the hour for the work produced, working more quickly may not be viewed as beneficial.

Improve the quality of life for users by focusing on efficiency. The younger associate will value the time he or she can spend with friends and family.

Determine the business need behind this effort. The need might be to stay ahead of competitors, improve client service delivery or other.

From Training Professional to Practice Group Analyst

Once you have received management support for change, the next step is to change your own role. The training professional needs to become a practice group analyst.

Analyze the business processes of the practice group. Start by learning more about the business of law. What is it the users you support actually do? Take an attorney to lunch. Have the practice group leader educate you on what is done in that practice. Meet with a secretary and an associate. Ask questions like:

How do you develop new clients?

How do you delegate work to others?

What keeps you up at night?

How much of your client communication is done via e-mail?

Do you collaborate with other clients via e-mail?

Do you need to send documents to clients and co-counsel?

Do you depend on the client or co-counsel to make modifications to documents?

Do you need to track the changes that are made?

How do you track the e-mail messages you receive?

Do you have an electronic filing system in place in Outlook?

Are you keeping paper copies in the client file? Is this a requirement of the court or client?

Listen to the answers. Don't advise or attempt to change anything at the analysis stage.

Analyze the make-up of the group. Do your homework.

"Who" is "who" in this group?

What are their backgrounds?

When did they join the firm?

How did they join the firm (associates, laterals, etc)?

Did the whole group join the firm at once?

In what training offerings have they participated and how long ago?

Did they attend any recent rollout training?

Are they participating in any ongoing training (either classroom style or e-learning)?

Are they using the support offerings available at the firm?

Are they calling the helpdesk? Review the helpdesk reports to see the types of questions they are asking and the resolutions that have been shared with them. If there have been problems that have not been resolved, be ready to listen to them.

Analyze group dynamics. Move to a desk in the practice group for a while. Observe the group dynamic and how the attorneys, paralegals and secretaries work together. Ask questions, listen and watch.

Conduct a document analysis. You are looking for whether or not the documents produced by this practice group follow the firm's best practices approach to document production. Even though much of the secretary population of the firm has been trained on how to style and number a document, a document audit can tell you if they are actually applying their skills in the documents. If the majority of the documents for this practice group do not follow best practices, then find out why.

Find out who in the group is drafting the documents. If the attorneys are doing most of the document drafting, they probably do not have the necessary skills to follow best practices. As you discover who is producing the first drafts of documents, you can then ask them how they go about it. Do you start with a form or template? Do you start with an existing document and modify it to fit your needs? Do you borrow text from other documents, PDF files or HTML? Is this content added to the document and then modified? Are you familiar with the firm's numbering tool?

Gather information using data analysis and interviews with both the practice group members and the user support and training team members who have the most experience with this group. If this group does not work with support or training, where are they getting their information? From each other?

Finally, gather your findings and review what you have. Don't make recommendations during the interview or observation process. This will distract from the real purpose of these meetings which is to learn as much as you can about this area of law, how the participants work together and how technology is currently used. Hold back on changing things at this stage.

From Training/Support Professional to Practice Group Consultant

Now that the analysis phase is complete, it's time to consult with the practice group. This is a real shift from standing at the front of a training room and teaching a class, to becoming a trusted advisor to a practice group, an advocate for the group and a liaison between the group and the technology department of the firm.

Consider this example of the role of the practice group consultant. In your first meetings with the practice group leader, you determine that a goal of the practice group is to serve clients better. During the analysis phase, you determine the senior attorney keeps a paper desk calendar, the secretaries use electronic calendars and the associates use a combination. You determine clients can be better served if everyone in the group uses electronic calendars to keep track of appointments, court dates, etc.

As the consultant, you will work to get all practice group members to use their electronic calendar. You explore current and new technologies that fill the need, identify the ideal workflow for using the chosen technology, and craft a learning plan for group members to learn the skills and workflow necessary to meet the goal.

Be a software consultant. Use your knowledge of current technology and how it is used by the group to recommend software or other technology that can better serve the group or individual group member needs. Continue to explore emerging technologies and identify opportunities for meeting the established goals and outcomes. Does the group need additional tools or can existing software be modified/customized to meet their needs?

Be a workflow consultant. Have you observed something happening that has caused the attorney to lose confidence in the technology? I once was called to troubleshoot a situation where an attorney was frustrated with saving documents into the DMS. She believed that her documents were being lost and edits were not being saved. She swore that the earlier changes she had made were not evident in her documents the next time she viewed them to make additional edits.

This attorney needed help. Observation of the secretary and attorney revealed the work process itself was faulty. The attorney did not know how to search for documents in the DMS, so her secretary searched for the attorney's documents and e-mailed copies of the documents for editing. The attorney would open the attachment in Outlook, make changes and e-mail the document back. The secretary would then open the document from e-mail and copy/paste it over the original document in the DMS.

Shocking, isn't it? When the attorney called the helpdesk to report that changes were not being saved, she was right. It was not a fault of technology but rather how the technology was being used. Providing just a little guidance (tweaking if you will) of the processes the attorney and secretary had in place was all it took to correct the situation.

Be a learning consultant. Create custom learning plans either for the individuals of the group or for the different roles within the group. Pull together the necessary coaching, training or mentoring needed. Set specific goals for the practice group, and set objectives for each learning plan. What can they do? What should they be able to do? How are you going to train them? Should you be training them? Do they need classroom training? Personal mentoring? Coaching?

Measure Your Success and Publicize the Results

Look at how many billable hours were produced by the group before the start of the practice group initiative. Where are they six months and one year later? What has changed for this group? Have the goals first established for the group been met? If your results were positive, be sure to publicize your success to other practice groups within the firm. Use quotes from the senior partner, associates and secretaries. This positive publicity will make it more likely that the other groups will transition to the new approach.

Classroom training still has its place in law firms (rollout training, ongoing training for secretaries and staff, etc.), but shifting the focus from training to learning can subtly change attorney perceptions that "training" is not valuable. Who doesn't want to learn? And, who is better equipped to make this shift than the trainers?

Trainers understand both the current and emerging technology. Trainers know how to determine the needs of the users and develop learning plans to meet those needs. Trainers have excellent presentation skills. This new approach requires trainers to have a high level of professionalism and to add a few new skill sets to their repertoire — communication and listening skills as well as analytical and problem solving skills. Allow some time for trainers to reach a comfort level with their new role as consultants and analysts.

If a practice groups' attorneys won't attend classroom training, take the learning opportunity directly to them. Not all members of a practice group need to have the same level of technical expertise, but all should be using the same best practices.

Practice group learning should be a way to help law firms become more productive and successful. Changing the role of the training/support professional could have a long term impact on perceptions about "training" with the positive result that each practice group will use their own best practices, and the firm as a whole will practice law at their best.