Rollout Training Using a Blended Learning Approach

by Char LeMaire of Traveling Coaches, Inc.

Today's law firms are being called on to train people faster, in more locations, in shorter periods of time and with less notice and fewer resources. Sound familiar? This has caused an evolution in training toward a solution called "blended learning." Originally, blended learning was used to describe e-learning combined with traditional classroom training. Today, our view of blended learning extends beyond the training department to include more of the firm's potential resources for training. A more current definition of blended learning is: The use of the firm's most effective training solutions, applied in a purposeful and coordinated effort, to achieve learning objectives that meet the firm's business goals.

One Size Does Not Fit All

How you build and implement a blended learning solution in your firm should depend on the characteristics and culture of your firm. An international firm with thousands of employees and multiple locations will take a different approach than will a small firm with 300 employees and one trainer.

While no two solutions will be the same, the process for designing a good blended training program is similar in any setting and includes steps that you probably already are taking. The key to a successful rollout is how you put the following steps together.

Step 1 — Determine the Need

Although often overlooked or cut short, assessing the business need and gathering information about the various learners in the firm provides a solid foundation for a blended learning program. Below is a statement that could be a firm's business need for moving to a matter-centric environment.

> *Our firm's matter-centric solution will allow for end-to-end management and tracking of critical client-related content including e-mail management, document management and records management. This, combined with our new business intake system and conflicts management, will allow us to stay ahead of our competitors in servicing our clients. The new technology is modeled on the way legal professionals work and collaborate, making it simple for attorneys to access and share any type of content from any of our locations, vastly improving our client service delivery.*

Gather information about how various learners learn and will use the new software. For example, you may have attorneys who do not draft documents using Microsoft Word, yet they need to know where to find those documents, how to attach documents to e-mail messages and how to manage e-mail content. By identifying unique learning needs, you can build learning plans that will provide just the right amount of training for that user's unique needs and style of learning.

Step 2 — Set Specific Goals and Objectives

What do you intend to achieve with your blended learning program? Here is where you need to identify very specific learning outcomes. Set goals to answer these questions: What should the training program accomplish? Who is the training for?

Sample goals:

> Introduce the benefits and key features of our new matter-centric software to the firm's partners and management.
>
> Instruct the firm's secretaries, legal assistants and attorneys on the features each group will need to know to be successful with the new software.

Learning objectives differ from goals and are specific to what the users will be able to do after the training is complete. Objectives should be measurable, attainable and precise and should answer these questions: What do they need to know? How well do they need to know it?

Sample objectives:

> Organize all client-related documents into specific matter folders and apply appropriate security.
>
> Locate current open matters on which the attorney is working and create workspace shortcuts to those matters.
>
> Select and file client-related e-mail correspondence into appropriate client/matter workspaces and apply appropriate security.

Step 3 — Get Management Support

Management support is necessary in order to obtain the resources needed to implement your program, particularly when you need to draw from resources not usually under your control. You need management support to ensure that everyone is allowed time to participate in the program and that participants are held accountable to make the desired changes.

Ask for input. People will defend what they have helped to create. Communication regarding the training program that comes from key management will have a strong impact on participation in that program.

Keep management informed. Be sure to report on the progress of your blended learning program. Send periodic updates in the form of an executive summary. It will be easier for you to sustain support from management if they are aware of the status and successes of your program.

Step 4 — Design the Blended Program
Using the goals and learning objectives, it's time to design the overall program. There are a variety of training solutions you can select and blend together to create the best learning program for your rollout project.

Classroom training: Instructor-led delivery of information is the most common type of training done in law firms today and for good reason. The classroom provides the opportunity to practice new skills together and share stories to illustrate how the learning content can be applied on the job. These stories and ideas help bring new learning to life and make it memorable.

Instructor-led e-learning: This includes any training where the primary delivery is electronic, and content is delivered via the Internet, intranet/extranet and/or audio/video technology. Webinars can be provided for users both at the home office and across the globe to show the new technology, explain when the new technology will be available and to provide a forum for questions and answers.

Self-study e-learning: Accessed by the firm's users without an instructor and on their own time, these training solutions allow users to preview topics before classroom training and to review topics afterward. Self-study e-learning can be used prerollout to introduce new concepts and processes to the users. Prelearning primers can gear up users for training and reinforce learning after the classroom experience.

Written references: These resources contain information or processes to support work activity and guide or enhance performance after the rollout. Examples include: instructions on how to open a matter using the firm's new matter intake process, quick reference guides for commonly used features of new software or a checklist of items for users to do when they return to their desks.

Firmwide communication: A variety of methods can be used to communicate the upcoming rollout to the firm. Critical to success are memo and e-mail messages from firm management that describe the business need for the change and set expectations for full participation. With marketing's assistance, a project theme, slogan or even a project logo can be developed and incorporated into all written communications and presentations.

Floor support with subject-matter experts: Trainers and nontrainers with specialized knowledge about the subject provide desk-side assistance immediately following a rollout of new technology. This "just-in-time" style of training is critical to the success of the training program. It is the first few days or weeks following conversion that can spell success or failure. This is when the users start to apply what they have learned in the classroom. Users not encouraged to try the new methods will often become frustrated and revert back to old processes and workarounds. With encouragement, praise and assistance, however, users will work harder to put the new methods in place.

Coaching programs: One-on-one coaching can help individuals enhance their knowledge, skill and acceptance level of new technologies. Often there are internal obstacles, old beliefs or patterns of thinking that prevent attorneys from using technology. Coaches can help determine the obstacles, acknowledge them and provide attorneys with assistance in adopting a new technology.

Step 5 — Use Learning Plans to Track Success
Once you have identified the learning solutions that will work well with your firm's culture, use your firm's learning management system (LMS) to design learning plans for the various learner groups. Your LMS should allow users to sign up for training, provide access to e-learning and register for classroom training. Users should have individual learning plans where they can track their own progress. The LMS will allow you to monitor the progress of the blended learning program and provide reports for key management.

Blended to Perfection

If you follow the steps outlined, you can create a blended learning approach that reduces the anxiety associated with change, accomplishes the goals and objectives of the rollout training and provides an environment for success.

About our author :: :: ::

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