



Firm University

Lessons Learned

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Lessons Learned from Firm Universities

CHAR LEMAIRE TRAVELING COACHES

At a time when firms are forced to do more with less, when competition for clients is more fierce, client demand for task-based billing is on the increase, and when secretary-to-attorney ratios have increased to as much as 1:6 or 1:7, it is critical for firms to ensure that employees have the right tools, knowledge and skills.

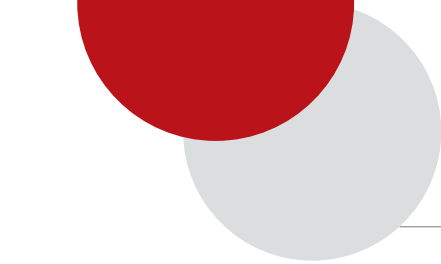
For many firms, the answer to building skills and knowledge is the firm university, a strategic tool designed for the development of employees. A firm university is not just for improving employees' technical and job skills, but also for building a culture of learning. Typical goals for the university often include the following:

- **Develop a culture of learning and loyalty**
- **Help the firm remain competitive**

- **Retain employees**
- **Organize employee training**
- **Support the goals of the firm**
- **Sustain change in the firm**

BENEFITS OF A FIRM UNIVERSITY

When lawyers and staff are skilled in document production and the use of technology, their firms benefit in many ways. Less time is spent on fixing the problems associated with poor document creation and editing skills. There is faster access to information when documents are saved properly into matter workspaces or profiled correctly. Improved processes and methodologies also reduce the amount of effort required to do the work, and higher skill levels lead to faster work. People who



are confident in their skills and abilities tend to be more motivated, and this leads to improved client service and client retention.

STEPS TO A SUCCESSFUL FIRM UNIVERSITY

In order to establish a successful firm university, firms need to do the following:

- **Establish and communicate top management's commitment to the program**
- **Identify strategic objectives and goals for the program (these should align with the firm's strategic goals)**
- **Identify best practices and core competencies for each staff member in the firm**
- **Develop or purchase content (classroom and e-learning)**
- **Develop targeted learning plans and delivery options**
- **Select suppliers and consultants who will act as learning partners (if appropriate)**
- **Design incentives, recognitions and certifications**
- **Market the program**
- **Evaluate and measure program success**
- **Celebrate success**

FIRM SUCCESS STORIES

There are several ILTA member firms with well-established firm universities. Representatives from these firms were asked to answer the following questions regarding their programs:

- **What were your goals for your program?**
- **Do your goals line up with your firm's overall goals? How?**
- **Do you have buy-in from firm management? How did you achieve that?**
- **How do you market your program to your learners?**
- **What does your program include? Classroom Training? Distance learning? Recorded sessions? E-learning?**
- **How do you track participation?**
- **How do you motivate learners to participate in your program?**
- **Do you have incentive programs or certifications?**
- **What impact has your program had on the overall success of the firm or the learners?**
- **What words of wisdom would you like to share?**



Name Jan Huber
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Number of Offices 6
Number of Learners 750

FIRM UNIVERSITY GOALS

It's been over five years now since we launched B&D University as an alternative approach to learning technology. Our goals were to provide the ability to assess learning needs, register for classes, attend online training, refresh the classroom experience with access to exercises and handouts and watch task-based demonstrations.

ALIGNMENT WITH FIRM GOALS

Our firm has always known the value of training programs, but individuals were finding it harder to be available at the time traditional classroom training was scheduled and were seeking alternative ways to learn.

MANAGEMENT BUY-IN

The executive director at the time of designing B&D University was very supportive, as was the chief executive officer who followed. I believe both individuals listened to their attorneys and support staff and were willing to support the budget requests for the structure to make it successful.

MARKETING

New hires are introduced to B&D University on their first day, and we continually refer people to this resource in announcements of new learning

opportunities or major project rollouts. We also remind people who call our Solutions Center of documentation or tutorials that could provide a reference to their question.

LEARNING OPPORTUNITIES

Our program includes classroom training, distance learning via Live Meeting sessions and e-learning. We have just a few recorded sessions but look forward to expanding this medium in the near future.

TRACKING

Our learning management system (LMS) is the foundation of our firm university and has the ability to track attendance and run reports.

MOTIVATING LEARNERS TO PARTICIPATE

We continually promote new offerings in B&D University and work closely with the HR department in identifying individual learner needs so we can develop specific learning plans. Another motivation is the ability to access B&D University from home.

INCENTIVES OR CERTIFICATIONS

We do not have any certification programs nor offer any incentives other than the opportunity to learn so our staff is better equipped to be successful.

IMPACT ON SUCCESS

I have seen learning taking place at various times instead of only when an instructor offers classroom training. There is no longer a waiting period to learn.

WORDS OF WISDOM

Start out simple and build upon your success. **ILTA**



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Number of Learners 425

FIRM UNIVERSITY GOALS

Our goals are ongoing. But our primary goal was visibility at first. The idea of using a computer to learn about a computer can be counterintuitive, and we wanted to make learning fun, easy and progressive. We also wanted to soft sell its role in our legal executive assistants' daily lives. We didn't want to add yet another administrative task to their workload, unless it could be fun and productive and could easily fit in. Our goal as we move into the program is to keep it fresh and up-to-date and to keep enticing our existing users and new users with new material.

ALIGNMENT WITH FIRM GOALS

Our goals do line up with the firm's in quite a few ways. We are regularly trying to find new and innovative ways to reach out and impact users, just as the firm tries to do with its clients. Obviously, in the past 12 to 18 months, money for new initiatives has not been easy to come by. Having this in mind, we're

getting the most out of our existing technology and talent pool to make what we have that much better.

MANAGEMENT BUY-IN

We did have buy-in from firm management, particularly with the LMS. From the finance perspective, there is the one-time charge and then maintenance, of course, but the product library is frequently updated and refreshed. While some software appears to be purchased and then never upgraded, our e-learning library is always getting additions. It was an easy investment to sell to upper management. We met with the professional development team at the firm and showed them our LMS and the potential for CLE tracking. We presented this as a program that has an application to all firm users in a variety of ways, not just for IT training initiatives.

MARKETING

We created a logo, a catchy name and an easy URL to type into the browser. We also had several meetings prior to the rollout with stakeholders to ask how they thought this should be delivered. Those meetings showed that we had to make it easy to get to the information and had to cater to different learning styles. We send out monthly e-mail messages with schedules for each site and then biweekly e-mail messages that contain tips. Often the biweekly tips come in e-learning format, and the message itself will provide a link “for a more graphic rendition of this tip, click here,” or “to see this tip real time, click here,” which drives our users to the firm university website. In addition, when our helpdesk gets a call for a task for which we have an e-learning module, we’ll solve the problem and then follow up with a link to the module. Our firm university is always there when people need it, without being overbearing.

LEARNING OPPORTUNITIES

Our program includes classroom training, distance learning and e-learning. We are considering podcasts, possibly an RSS feed, as well as integration into our helpdesk call tracking application. I’ve even thought about adding an online store so that learners could purchase job aids with credits earned.

TRACKING

We track participation completely through our LMS. Because it’s closely integrated with e-mail, there is not a lot of manual labor involved with the scheduling and reminding, as well as rosters and follow-ups.

MOTIVATING LEARNERS TO PARTICIPATE

Our secretaries have a section in their evaluations that addresses IT training participation. In addition, having the firm university available online has also been a motivator. Frankly, it can be fun for our users to attend training because it now comes in so many formats for them.

INCENTIVES OR CERTIFICATIONS

Our secretaries have training attendance requirements built into the evaluation process. We do not currently have a certification process, though we are exploring learning plans and incentives for those who complete them. We’ve also worked with our marketing group for ideas on knickknacks to be given after certain achievements. In addition, we work with the manager of the secretarial group and keep her informed of any standouts when it comes to participation in training. There is formal recognition by way of evaluations, but also having a firm university has opened up a dynamic and productive line of communication between IT and the secretarial staff (who are our biggest and busiest clients).

IMPACT ON SUCCESS

As with many IT initiatives in a law firm, it’s often hard to list tangible benefits. There are the obvious ones, fewer calls to the helpdesk, a higher level of proficiency in certain areas of Word and Outlook, specifically. But the firm university really brings us all together. Because most of the database is public (the schedule, the e-learning modules, the distance learning modules, but not individual learner profiles or data), people know what we’re doing and how to reach us, and there isn’t much mystery as to what we are trying to achieve. The firm university has a very

good reputation, and we're working on a New Year's resolution program to get more learners (senior staff and attorneys) to the university in 2010, coupled with an upgrade and the addition of very task specific modules. While we've been successful in getting it out there and getting value from it, we are by no means done. It is also a primary goal to keep our users interested. To continue to have this be a viable resource to our learners, we have to keep it fresh and new and repackage it regularly. We still need to come up with a name for the 2010 learning initiative, but I'm confident that the firm university will continue to benefit and interest our users for years to come.

WORDS OF WISDOM

Consider the personalities of your users as well as their skill sets. Diversify your learning offerings based on this. The firm university, to really have an impact, needs to have something for everyone, and it needs

to be easy to find and the material kept up-to-date. I would also advocate that IT maintain the database and scheduling and modules, based on input from the stakeholders. Conversely, the training measurement and any resultant punitive actions should not be IT's responsibility and not seen as part of the firm university program. I would also start slowly if possible. While it's enticing to throw it all out there as a deliverable, break down the different parts of the university and sell them as important parts of a bigger picture (with the bigger picture coming soon). The rolling out of a firm university should be managed like a project, from start to finish. If done right, it can become your most public asset and will eventually sell itself. **ILTA**



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 Firm Leonard, Street and Deinard
 City Minneapolis
 Number of Offices 4
 Number of Learners 414

FIRM UNIVERSITY GOALS

The welcome message on our Deinard University website clearly states our program goals. Our firm is dedicated to our clients' success; we are equally dedicated to our employees' professional success. As represented in our core values, the

firm supports and encourages a culture of continuous learning and improvement. The goal of Deinard University is to prepare staff to become professionally excellent, so in turn they deliver excellence to each of our clients. All employees are asked to embrace

the concepts of continuous learning — regardless of position or job category. Our goal is to offer abundant and relevant learning opportunities to deepen the professional knowledge of all employees while encouraging them to embark upon new challenges and greater success. Through engagement and commitment to continued professional development, we all benefit and become an even greater place to work.

ALIGNMENT WITH FIRM GOALS

Our Technology Track offers ways to increase technical skills to be more productive, stay competitive and support improved levels of client service. It features hands-on classes, demonstration sessions and independent study options geared toward all levels of firm personnel, and focuses on making best use of available technology to present a consistent, professional image of the firm.

MANAGEMENT BUY-IN

Firm leadership has always encouraged continuous learning and skill development.

MARKETING

Those learners who wish-list any course in our extensive catalog of classes receive immediate notification when a new session of that class is scheduled, and they have the first chance to register for a class. Weekly notices of all classes with available seating are sent by e-mail to appropriate personnel on branded “stationery.” Lunch and Learn programs are marketed via e-mail using targeted messages and eye-catching graphics. Class attendees are informed about additional classes that might be of interest to them as follow-ups to current sessions.

LEARNING OPPORTUNITIES


The Technology Track concentrates on classroom training and distance learning. We use Microsoft Office Communicator’s sharing capability as a means of including participants from regional offices in our classroom sessions, and we have them take control of the instructor’s machine for hands-on experience as appropriate. We are exploring the possibility of recording some sessions in the future, with an eye to posting them in SharePoint and marketing them by e-mail. We have offered some e-learning options using SnagIt and Captivate recordings, and we’re planning to create additional training options with Captivate. We also encourage independent study using classroom materials, followed by a conference with the instructor to respond to any questions and to discuss ways to apply the learning from the class.

TRACKING

All attendees are required to sign in at each session. Class participation is tracked in Deinar University using our LMS. For associates, attendee tracking reports are included in annual reviews.

MOTIVATING LEARNERS TO PARTICIPATE

With respect to specific training incentives or perks, in the technology arena our legal secretaries and legal services specialists are expected to complete 10 hours of technology learning per year — our version of CLE requirements for our support staff — and this requirement affects their reviews. All legal secretaries and legal services specialists are required to complete a Basic Learning Plan, and each receives a gift certificate on completion. Those who go on to complete Intermediate and



Advanced Learning Plans are rewarded with a half day of personal time off for completion of each of those plans. Our personnel are also motivated by the fact that many of our offerings, particularly those geared toward timekeepers, require minimal time commitments.

INCENTIVES OR CERTIFICATIONS

In addition to those listed above, tracking reports are referenced in associate reviews.

IMPACT ON SUCCESS

Our personnel are very conscious of the need to keep up and improve their technology and legal practice skills, and management has the tools to keep track of learning plan progress. Microsoft Word-related calls to our helpdesk have decreased significantly since we began implementing our technology learning plans. Our users are more confident working with documents and are better prepared to handle assignment shifts and take on new projects that require previously unused skills. They are more aware of ways technology can save time, and they know where to turn for assistance when needed, rather than wasting time spinning their wheels.

WORDS OF WISDOM

The employer-employee relationship is a social exchange. Employees choose to give their energy, intellect and innovation to an employer. It is wise to ensure this is a two-way relationship. An employer who chooses to invest in an employee's career — especially beyond what's immediately needed — will likely find engaged employees ready to reciprocate.

Also, a training program is never done. In today's fast-changing legal market, the content of the training will evolve to match client and market demands. One must keep an eye on the external market as well as the needs of the internal market to bring forth experiences that help the firm stay competitive and service-oriented. It's interesting to read some of the comments received from our firm university enrollees.

"...a great opportunity to refresh my skills and learn something new."

"...even if you learn one or two little things, it can make a huge difference in productivity!!"

"... the Deinard University classes are a great resource to increase our knowledge, and with that knowledge is the ability to increase our productivity."

"...teaching us the various technical applications greatly enhances the quality of our work, and that reflects favorably back on the firm."

"I just wanted to drop you a note to let you know how terrific this training program is. We have a great deal to learn if we are going to be efficient in our jobs and, thereby, truly offer good customer service. Always, learning time is not wasted or lost time."

"Without the Deinard U classes I would not have had the knowledge or the confidence to dig in and do it. Plus, I am having fun!" **ILTA**



Name Darla C. Glab
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City Chicago
Number of Offices 1
Number of Learners 400

FIRM UNIVERSITY GOALS

Our goals were to offer and track ongoing workshops for continued education, to determine training needs and to prepare for skills assessments for secretaries. We also needed to improve productivity for all secretaries.

ALIGNMENT WITH FIRM GOALS

Increased individual productivity helps to reduce costs (overtime), improve client service and improve the overall health of our documents.

MANAGEMENT BUY-IN

Our firm university was created when we conducted our first skills assessment in 2006. We really did not need to sell the idea. We said we were creating a NGE University to improve productivity and they said “Great idea!”. Firm management and HR receive reports for year-end evaluations. All secretaries are required to achieve four credits per year. This information goes into their file and is part of their review. Continued education in all areas is an ongoing firmwide initiative for attorneys and staff alike.

MARKETING

The credit requirement is the most significant incentive to attend classes. We make announcements

at the quarterly secretary meetings with any new classes or programs being offered and ask for input for suggested workshops. We send out e-mail messages for new classes and send out tips of the week. We encourage the secretaries to drive the classes that are offered so that they feel more involved.

LEARNING OPPORTUNITIES

Classroom training, e-learning and the use of outside training vendors for classes that are not offered in-house.

TRACKING

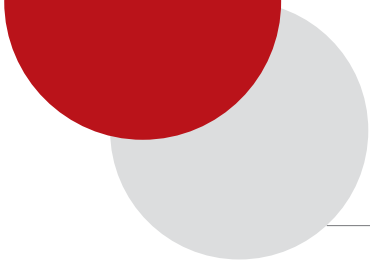
Class participation is tracked through our LMS. Each secretary is assigned to a learning plan which indicates the classes they still need to take before the learning plan deadline. Each year a new learning plan is created and assigned to all secretaries.

INCENTIVES OR CERTIFICATIONS

We are in the process of offering SME certifications, and secretaries know that their achievements are noted in a report to HR.

IMPACT ON SUCCESS

We have greatly increased our core competency level. This year we had a baseline score of 78 percent in




April and had a post score of 90 percent in August for our skill assessment. We conduct a skills assessment every two to three years.

WORDS OF WISDOM

Without the 100 percent buy-in and support from firm management, it would be very difficult to keep momentum. This has been the key to our success. We give certificates to all the secretaries who achieve the required credits, and this year we had a recognition lunch where we invited all of the secretaries for a pizza

party. We called up those who scored a 100 percent on their skill assessments, and they each received a \$50 gift card with their certificate. Our HR director, secretary manager and director of administration were all in attendance. **ILTA**

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	City	San Antonio
	Number of Offices	4
	Number of Learners	238

FIRM UNIVERSITY GOALS

- Retention
- Keep them coming back
- Make it fun
- Interact with other employees outside of your section

ALIGNMENT WITH FIRM GOALS

Our firm markets ongoing training, or an in-house training facility, so continuous training matches up with their goals. HR also tells prospective

employees about our training program and the fun we have.

MANAGEMENT BUY-IN

HR is a strong believer in the benefit of ongoing training and encourages, or sometimes requires, users to attend. If we are playing a game or hosting a “Lunch-n-Learn,” HR is always involved. Usually at the beginning of every year, we have an annual Training Kick-Off Lunch-n-Learn with games to announce what our plans, goals and our theme for the year are. This is something we plan in advance with HR.

HR also has technology requirements in users' reviews. HR prints out a list of the classes users have taken right before their review to see if they've met the technology requirements.

MARKETING

- **Reminder e-mail messages when we have classes booked on our LMS**
- **Quarterly newsletters**
- **One page "Focus" newsletters that market a particular product**
- **E-mail messages advertising or marketing special classes**

LEARNING OPPORTUNITIES

- **We offer classroom training**
- **Distance learning for remote offices**
- **Onsite training at remote offices**
- **E-learning**

TRACKING

Participation is tracked through our LMS.

MOTIVATING LEARNERS TO PARTICIPATE AND INCENTIVES

We use "Frequent Learner" punch cards. The cards are like those you might get at a coffee shop. Ours are in two categories: a 5-punch and a 10-punch card, which equates to classes. If you attended five classes, you get a gift card with a \$5 value. If

you attend 10 classes, you receive a card with a \$15 value. Incentives include lottery scratch-offs, gift cards to local movie theaters, gas stations, restaurants and stores.

IMPACT ON SUCCESS

This week alone, we've seen nearly 30 people attend various classes.

Firm dynamics have changed, and we no longer have floater secretaries for coverage. When a secretary is out, she has to depend on another secretary from her own section, resulting in an increase in calls to the helpdesk that indicate they are having trouble working on each other's documents. Attorneys are also doing more of their own work, and they are calling as well. So we've been offering a series this week to address that issue — how to achieve better document production.

WORDS OF WISDOM

It definitely makes a difference having HR's buy-in and participation. We always have high attendance at our lunches, and HR staff are there to lend a helping hand. We meet to review the theme and their roles so they can rehearse in advance. Their suggestions, comments and involvement aid in making it a better program. You don't have to spend a lot of money to come up with some interesting ways to learn. Make it fun!

- **Assessment testing made into a game of musical chairs (or musical documents).**

A document is passed from user to user to show how bad a document can be with so many "hands in the pot." Plus, as the document is passed on, if a task is not completed, it falls to the next user

to finish that work as well as the next steps they were required to do. Afterwards, we have users requesting classes for any of the tasks they didn't know how to do.

- **Game show Lunch-n-Learns based on “Jeopardy,” “Who Wants to be a Millionaire,” “Password” and “Pyramid.”**

In our Pyramid game show we had our HR managers dress up as the celebrities, and we gave it a theme called “Fun in the Sun.”

- **Topic-specific Technical Bytes Lunch-n-Learns in a training room over brown bags or firm-supplied lunches with guest speakers including network experts and attorneys. ILTA**

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GETTING RESULTS

You don't have to be a big firm to use the firm university concept. One small firm has good success with just a simple monthly calendar. The classes are planned based on helpdesk calls and trends the trainer notices the previous month. Classes are very short, no more than 30 minutes, and cover only two or three specific tasks. The trainer also selects “off” times; she starts afternoon classes at 1:15 p.m. That gives learners a chance to get back from lunch and catch up on any voicemail or e-mail messages; but it is not so much time that attendees get involved in a work project. A firm university could be the solution any firm needs to achieve its strategic training goals. Whether the goal is providing employees with the skills and knowledge they need to help the firm succeed, or creating a training program that ensures everyone is on the same page, firm universities continue to make a difference. **ILTA**