

How Many Hats Can I Wear?

The Evolving Role
of the Trainer

The Panelists

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Firmwide IT Training & Quality
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Sr. Technology Training/Staff
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◆ **Shafik Premji**
Systems Trainer
BD&P Burnet, Duckworth & Palmer LLP

Kisha Y. Minor - Facilitator
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Session Goals

- ◆ Discuss the evolution of the non-traditional aspects of the training position
- ◆ Discuss how the delivery of training has diversified over time
- ◆ Show how to successfully incorporate a new responsibility into your mandate

Audience Poll

- ◆ On your mobile device or laptop navigate to:

<http://ilta.cnf.io>

- ◆ Find the session titled:

245 - The Evolving Role of the Trainer

Spot Poll

- ◆ What challenges do you face incorporating these new responsibilities into your mandate?

Poll Results

- ◆ Let's see the results:

<http://ilta.cnf.io/sessions/245>

Poll Question # 1

Be Honest (it's anonymous)...

Do you fear or embrace the
changing role of the trainer?

<http://ilta.cnf.io/sessions/245>

Training Needs to Toughen Up!

Training leaders of tomorrow need to work differently and have a different image at the table

- ◆ Change managers
- ◆ Client service practitioners
- ◆ End user advocates
- ◆ Desktop applications specialists
- ◆ QA specialists

You are Perfectly Positioned !

Opportunities

- ◆ Lawyers are the key
 - ◆ Changing role of the secretary
 - ◆ BYOD
- ◆ Client service can give you a competitive advantage, and build loyalty
- ◆ Facilitate and consult

Lawyers DO Come to Class

- ◆ ABA Ethical obligations to protect confidentiality
- ◆ ABA Comment 8 to Model Rule 1.1 states that:
 - ◆ To maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, including the *benefits and risks associated with relevant technology*, engage in continuing study and education and comply with all continuing legal education requirements to which the lawyer is subject

“Lean In”!

- ◆ Be a good negotiator and a strong networker with lawyers and support staff
- ◆ Create, recognize, and seize opportunities
- ◆ The key is being attentive, objective and focused on opportunities that emerge
- ◆ Be bold and take calculated risks
- ◆ Don't be swayed by pressure and fear
- ◆ The right people are already familiar with technology - utilize them

Lean In Examples

At Cravath we:

- ◆ Created an associate technology group
- ◆ Capitalized on existing attorney knowledge
- ◆ Set up a focus group
- ◆ Set up a meeting with our CLE organizer
- ◆ Leveraged secretaries and other support staff

Act Now!

- ◆ Set up a focus group of users NEXT week
 - ◆ If you're not comfortable facilitating a group - take a class
- ◆ Ask your lawyers what they are doing and what they need
- ◆ Take your internal CLE manager to lunch

Act Now!

- ◆ Talk to your lawyers NEXT week
 - ◆ What are they doing with BYOD?
- ◆ Track changes on an iPad
 - ◆ Do they know how to do it in Word?

Poll Question # 2

Have you ever used attorneys or staff as expert speakers in your IT training sessions?

<http://ilta.cnf.io/sessions/245>

Leverage Your Expertise

“I offer my expertise and experience for hire in order to help a group of people reach the summit”

- Anatoli Boukreev

Leverage Your Expertise

- ◆ Our life experience and performance may lead to additional training and support opportunities
- ◆ Leverage that knowledge with attorneys and staff
- ◆ Encourage Knowledge Management by asking others to do the same

Leverage Your Expertise

- ◆ Organize the information in a media easily accessible to all employees
 - ◆ Learning Management System
 - ◆ Intranet
- ◆ Prepare the documentation for instructor-led courses
- ◆ Prepare modules for on-demand training

Leverage Your Expertise

- ◆ Incorporate these new responsibilities by involving the attorneys and staff associated with the new “hat”
- ◆ Encourage your lawyers and staff to prepare materials, a discussion, or their own training sessions to assist with the implementation
- ◆ Give one of them an admin. role to research and keep the information updated - you don't have to do it all!
- ◆ Include all information in the media discussed
 - ◆ LMS, intranet, instructor-led training

Poll Question # 3

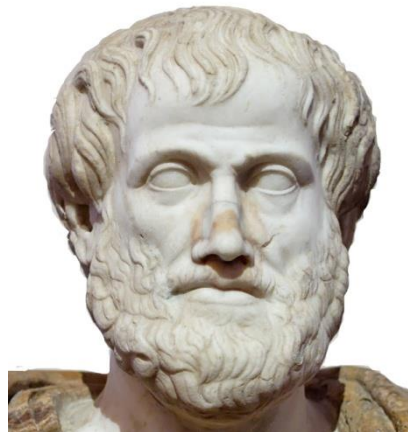
Outside of the traditional instructor-led trainer role, what other "hats" do you wear?

<http://ilta.cnf.io/sessions/245>

Expand Your Expertise

First, have a definite, clear practical ideal; a goal, an objective.
Second, have the necessary means to achieve your ends;
wisdom, money, materials, and methods.
Third, adjust all your means to that end.

~ Aristotle



Expand Your Expertise

- ◆ Being a trainer in today's world requires you to do more than just traditional training
- ◆ Common theme - incorporate the start-to-finish PM of a software rollout
- ◆ We are required to understand the technical aspects of software and work with technical analysts



Expand Your Expertise



As a Project Manager I am responsible for:

- ◆ Ensuring that the Help Desk is on the same page
- ◆ Documenting all aspects of the project using specialized software
- ◆ Preparing staff with training sessions/manuals once the software is rolled out
- ◆ Preparing project summaries for executives



Expand Your Expertise



Being a Trainer and a Project Manager:

- ◆ Diversifies my skill set and allows me to be more well-rounded with technology
- ◆ Helps me develop my documentation skills for training from a different perspective ("thinking outside the box")
- ◆ Provides better job security
- ◆ Gives me a seat at the table when decisions about training are being made



Poll Question # 4

What percentage of training time is attributed to traditional instructor-led classroom training?

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Trainers as Coaches

“The real opportunity for a legal IT support professional lies not just in having expertise in the technology, but in being able to talk about the technology.”

*ILTA Peer to Peer
December 2012*



Trainers as Coaches

Traditional means of training lawyers and staff were becoming increasingly inefficient in today's workplace.

- ◆ No time to sit in long classes
- ◆ Different learning styles require flexible training strategies
- ◆ Technology itself is no longer a differentiator



Trainers as Coaches

- ◆ Traditional means of training lawyers and staff were becoming increasingly inefficient in today's workplace.



- ◆ With fixed fee arrangements and clients demanding more with less, lawyers and staff didn't have the time to sit in long classroom sessions.
- ◆ Gen X and Y associates came on board with different learning styles and needs, hence the need for a shift in our training strategy.
- ◆ Technology itself is no longer a differentiator; intelligent and effective use of technology has become fundamental.

Trainers as Coaches

- ◆ The Hunton & Williams' Technology Coaching Program was created to ensure our trainers and IT professionals:
 - ◆ Work closely with attorneys and staff
 - ◆ Understand their assigned attorneys' practices and workflows
 - ◆ Provide targeted training, guidance and support in the effective use of technology.
- ◆ Coaches are embedded in the legal teams
- ◆ The need for and use of skills assessments are emerging to identify skills gaps and to provide focused training

Trainers as Coaches

- ◆ Benefits
 - ◆ Achieve a higher level of performance
 - ◆ Acquire skills essential for success
 - ◆ Increase billable time
 - ◆ Reap return on investment
 - ◆ Realize greater efficiencies necessitated by fixed fee arrangements (10% efficiency = 60 additional lawyers or 60 million in revenue)



Trainers as Coaches



- ◆ Coaches Need Coaching
 - ◆ Mentors
 - ◆ Internal and external conferences
 - ◆ Wiki/LMS
 - ◆ Monthly assessments
 - ◆ Peer training
 - ◆ University of Richmond's "Influencing for Commitment" educational session

Trainers as Coaches

- ◆ Build a relationship
- ◆ Invest in the lawyer's secretary - s/he is their gatekeeper
- ◆ Talk their talk, not yours
- ◆ Learn their lingo - don't use techy words
- ◆ Understand what is behind their deadline
- ◆ Become valuable to the lawyers and their teams



- ◆ Learn about the lawyer and their practice a little at a time
- ◆ Know their workflow process and learn how to apply technology to it
- ◆ Analyze their needs - make suggestions when appropriate
- ◆ Avoid saying what they can't do
- ◆ Make their life easy - have a sense of urgency when working with lawyers and their teams

Poll Question # 5

Did you design your own hat?

In other words, did you actively conceive of—or pursue—any of these additional roles?

<http://ilta.cnf.io/sessions/245>

Add to the Bottom Line

Quality Assurance - a new “hat” for training

- ◆ Increased number of QA testers without hiring additional staff
- ◆ Eliminated time and expense of hiring/training contractors
- ◆ Reduced overall testing time
- ◆ Leveraged the trainers’ knowledge for user acceptance testing
- ◆ Increased the trainers’ familiarity with the software



Add to the Bottom Line

How can a trainer's role add value to the bottom line of the firm?

- ◆ Evaluator - ensuring software/hardware is appropriate for the firm needs
- ◆ QA - ensuring new software integrates correctly with other programs used at the firm
- ◆ Personal trainer - saving valuable attorney and staff time through targeted training
- ◆ Master of the “big picture” - disseminating best practice tips and processes



- ◆ Technology guide - being aware of new technologies and helping people navigate the Technology Jungle

Add to the Bottom Line

How do I make people aware of my contributions?

- ◆ Provide a weekly report to your supervisor
- ◆ Leverage the firm newsletter or intranet to publish updates on activities that take place behind the scenes
- ◆ Develop short presentations for staff and/or practice group meetings that showcase some time-saving tips
- ◆ Market your classes and training tips by including words in the titles or descriptions that emphasize that the benefits in terms of time savings, cost savings, etc.



Add to the Bottom Line

Remember that Google is one of
your biggest competitors ...

... and it's free!

Group Activity

- ◆ How will you get educated about this new hat?
- ◆ How will you convince your key firm stakeholders that this new hat should be worn by your training team?
- ◆ How will you convince your training team members that this new hat should be worn by your training team?

Pick ONE hat!

Project Management

Coaching

**Quality Assurance /
Application Testing**

How Many Hats Can I Wear?

The Evolving Role
of the Trainer

MANY Hats!

