

PLEADING THE  
CASE FOR  
WORKING  
TOGETHER



by Amy Hancock and  
Marti Phillips



# The Importance of a United Focus and Purpose for Training and Professional Development

Four years ago, an announcement came out about a new position at our firm, director of attorney professional development. As the firm's training manager, my first reaction to this news was to wonder what in the world this person was going to do that our training team wasn't doing. Our law firm education programs had traditionally consisted of a healthy dose of technical training to integrate technologies into the practice of law, so I had a dialogue with my chief information officer that sounded a little like this: "What is attorney professional development anyway? Isn't that what I'm doing for the attorneys at the firm? Attorneys don't attend most of the training we offer them and now we are hiring someone to do even more of it? Wait ... is this person taking my job? I just don't understand the difference between our two positions."

Then the moment arrived when I actually met the new director of attorney professional development. Finally, it all clicked. We talked about learning, professional development and training programs and quickly realized that we had similar goals and that we couldn't reach them without working together. It was time to let the dialogue and collaboration begin.

Building a learning environment for the firm as a whole makes sense because our focus is more toward development of the attorney skills assisted by technology and less on the technology skills alone. The Andrews Kurth LLP team of attorney professional development and IT user support/training offer reasons for close collaboration and share some best practices for doing so.

## Attorney Professional Development

Professional development (PD) is education geared to promote the critical skills necessary to being a successful attorney. It includes advanced legal writing; business and financial statement mastery; client development; marketing, communication and interpersonal skills; leadership, project management and delegation; litigation training and negotiation. Do these professional development skills

include technology? Yes. Since technology skills are tied into professional development, then it stands to reason that we would have to get more attorneys into technical training. To facilitate this, however, IT training and PD need to collaborate and plan together as a learning team.

## How We Work Together to Make It Happen

The strongest case for collaborative team efforts between IT and PD is the business basis, and it's certainly true that client service (internally for the firm attorneys and externally for firm clients) is greatly enhanced when the two departments work together to achieve common goals. Our primary learning goal at Andrews Kurth is to help attorneys grow professionally through educational opportunities. But what do attorneys really need? The quickest way to find out what training attorneys want and need is to communicate directly with them. But, just in case billable work gets between you and the scheduled time with an attorney, try communicating with the PD team. Because PD staffers communicate regularly with attorneys, they are a direct link to them. The PD director at Andrews Kurth meets with attorneys when they first arrive at the firm. As a team, needs are assessed, thoughts and details about skill levels in various areas are established and a bond of trust is born. With this information, a comprehensive professional development plan is created. Some of the ways we deliver these PD learning opportunities are:

### • New associate orientation, which includes:

- Three days of intensive training focused on being an AK attorney
- Team-building activities with associates and partners
- Educational sessions (including time keeping strategies, legal writing and a firm overview with introduction to management)

- **Continuing legal education (hosted both onsite and online)**
- **New associate learning plan (including e-learning modules such as compliance training for anti-harassment, diversity orientation and technology continuing education based on commonly used programs such as time keeping and document management)**
- **New associate monthly professional development tips on being a successful attorney**

## Amy's Point of View: Professional Development Director

Basically, if we can focus on what successful attorneys in the firm have done throughout their progression, we can take those successes and build our professional development training programs around honing those much-needed skills. I share this information with our training manager so that together, we can create training that is most effective. For instance, if PowerPoint skills are something attorneys need as they prepare CLEs to deliver at their clients' sites, then it's my job to meet with the training manager to see if there is a class that can be geared towards attorneys using PowerPoint. Technology touches all departments and facets of the firm. It facilitates the training that makes technology more user-friendly, but someone has to invite the IT training professionals into the attorney "inner circle" to further expose attorneys to the IT team's purpose and resources. This is where collaboration among our two departments is invaluable.

At our firm, we took the time to have helpful, ongoing dialogues in order to really understand each other's objectives, directives and resources, and tried to plot a course for how those could align. In my capacity as director of attorney professional development, I now use the IT e-learning plans and training courses offered and try to make them relevant to each individual attorney by tying them to the attorneys' self-evaluations. These self-evaluations include the question, "How have you undertaken some means of your own professional development this year?" Their answers are tied to yearly performance evaluations, promotions to partnership and compensation decisions, and are therefore very relevant to each attorney. I have even suggested to attorneys that

they print out the learning plans and roster of training courses attended as "report cards" of sorts and attach these to their self-evaluations.

## Marti's Point of View: National Training Manager

In my capacity as the national training manager, I meet with Amy on a regular basis to run through ideas we both have for attorney training. Amy encourages practice groups to invite me to their meetings to deliver short tips on using specific technology. The bonus here is that I'm given the opportunity to listen to the actual needs of the attorneys in that section and build technology and training solutions for them. With this information, I know what I'm building is on track with their specific needs and that I'm not resorting to using the prescribed methods done in the past. The technology team now has a seat at meetings where firm processes are decided. Initial process planning prevents groups from repeating work that we have already accomplished or from buying software that does the same thing as software we already own.

In solving the "how can I get attorneys to come to training" dilemma, you have to collaborate with other departments, and a great place to start is with those who conduct attorney professional development.

Listed below are some concrete ways you can help your PD department recognize that IT is the link to important programs and databases and educate them on how they can utilize these programs from an attorney training and development perspective.

- **Provide an evaluation form at the end of attorney new hire training and share results**
- **Advertise attorney PD programs and create other helpful quick reference cards for attorneys, e.g. "Attorney-On-The-Go" information sheets that include helpdesk information for attorneys who are traveling**
- **Develop electronic competency and benchmark programs (to track individual attorney performance and accomplishments) and electronic attorney career and business development plans**
- **Facilitate minimum continuing legal education programming (attendance sign-up and tracking, certificate and online verification production, program**

# What Do Other Firms Do? Survey Says . . .

by Honora Wade, Perkins Coie

In December 2008, ILTA's User Support Peer Group published a survey regarding training and helpdesks. Input was received from 278 firms (just under a quarter of ILTA's membership at that time) and provides a sound benchmark of what's happening in this arena.

## WHO'S ON FIRST?

We did not survey specifically on whether trainers were assigned to IT or human resources. However, the question is instructive regarding the division that likely exists in most firms. Remember that respondents are largely ILTA participants, thus coming from the IT side (rather than HR). Only 11% indicated that "soft skills" (non-technical training) were offered by the training department and only 9% indicated that continuing legal education courses were offered by the training department. This suggests that a significant amount of professional development work is happening separately from the trainers, if at all.

Digging a little deeper and looking at online training programs, we see that only 5% of firms have CLE incorporated into that program.

## WHO'S ORGANIZING THE TEAM?

And when we look at responsibility for the training budget, it further shores up the impression that HR and training are separate and distinct at most firms. Only 7% of firms reported HR having responsibility for the training budget.

## WHAT DO WE NEED TO DO TO WIN?

According to the survey, some of the biggest challenges our respondents perceive in providing training to the firm are: "lack of learning culture;" "full understanding of how training is related to other firm initiatives;" "cooperation from other

administrative departments;" "defining scope;" and "national coordination of training efforts". As highlighted in "Pleading the Case for Working Together," many of these challenges can be addressed through a strong partnership such as that which Amy and Marti have forged between IT and PD departments.

We saw further evidence of this in responses received to questions about the learning management systems in use at firms. We allowed multiple responses to certain questions, anticipating that some, such as those about e-learning products, would require that. We were surprised, however, by how many firms have multiple LMS products in use. The training department, CLEs PD and HR were all using different products (e.g., UniversitySite by IT/training, CLE Tracker by PD staff, and the HR software such as Ultipro for additional legal training).

This "all-over-the-board" approach makes it difficult for a manager or practice group leader to identify what their people have accomplished. It makes it very challenging for employees to assess their progress. It creates roadblocks to comprehensive learning. And it forces IT to support multiple products. In short, it's expensive and doesn't serve anyone well.

Only a coordinated approach will enable a firm to truly make strides towards a comprehensive professional development program. **ILTA**



From [iltanet.org](http://iltanet.org), go to Publications, White Papers and Surveys to download the User Support Survey

effectiveness evaluation, program recording and uploading to the firm's learning management system for future viewing)

- Offer real-time and on-demand learning plans
- Document performance evaluations, reports and other statistical analyses used by the PD department including:
  - Vendor and software package selection
  - Electronic tracking of mentor program and attorney workload allocation databases
  - Exit interviews (electronic forms and statistical information compilation)
  - Upward attorney reviews or annual attorney evaluations

## Find Ways to Work Together

The following are some best practices for working in a collaborative fashion with the PD professionals in your firm:

- Take every opportunity to include PD and IT people in your developmental needs and strategy sessions.
- Send your managing partner or executive director copies of everything you do or collect in regards to PD/IT collaborative efforts and results.

This will help educate others on why and how the two departments should work together. Be the link between your two departments and other departments (such as HR and recruiting) when applicable. Invite your counterpart to attorney meetings and offer to showcase his or her expertise as it pertains to something the attorneys are working or training on.
- Attend each others' training sessions.

PD professionals should attend every technical training program offered by the IT department and vice versa.
- Share the results of your training surveys, helpful listserv posts and other industry-specific articles and information.
- Learn what resources the other has at their disposal and ask to "shadow them" on their jobs when possible.
- Always enlighten the other department as to what the firm attorneys need and are trying to accomplish and support each others' efforts.
- Take every opportunity to share, communicate and collaborate.

Collaboration between your two groups is crucial, because it will provide more opportunities for you both to showcase your talents, become more entrenched in your firm, ensure your seats at the management or decision-making table and build your reputations as superior team players. Collaborating with people in other departments at your firm creates key alliances; and with more people striving toward similar results, the chances of achieving them are greater.

For more information on this topic, please see archived conference materials and handouts from ILTA's 2008 "Where You Fit in Your Professional Development Program" presentation. [ILTA](#)



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