

WHITE PAPER

Increasing the Relevance, Adoption, and Impact of Law Firm Training

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Setting the Stage

The scene: a big law firm's largest conference room, set up for an internal training session. Two partners sit at a raised table in front of 32 expectant attendees sitting classroom-style in rows of seats. The partners confirm that the laptop is connected to the projector and the microphones work, then click to the first slide of the presentation. They talk, the audience listens, and occasionally one of the listeners raises a hand and asks a question. An hour later, the attendees complete evaluation forms, pick up their handouts and file out of the conference room. Three weeks later, most of the attendees remember little from the session. The handouts from the class rest peacefully in binders or on credenzas, rarely if ever to be viewed again.

Whether you're an attorney or a law-firm training manager, this scenario may be all too familiar. While the attendees do usually get continuing legal education (CLE) credits from attending, surely they also should get a boost in knowledge and skill. Law firms are seeking such increases not only because each training session represents a substantial investment of attorney time and mental energy, but also because clients are (rightfully) demanding more value from their outside law firms, which are in turn facing intense pressure to increase their attorneys' abilities quickly so that those attorneys provide excellent value for their billing rates. Sessions like the one above, while noble in intent, don't do much to achieve this goal.

Our firm, like others, faces this pressure to develop attorney skills quickly and well. We have thus invested in an extensive attorney professional development program that serves attorneys at all levels. While such formal training does provide the opportunity to increase attorneys' knowledge and skills, we do face several challenges in maximizing the value of formal training, including the following:

1. **Clear positive impact.** Designing training sessions that demonstrably increase attorney performance is difficult. While it is possible to show that knowledge of substantive law and procedural matters has increased, it is tough to establish that the application of such knowledge in real-life situations has improved, and even harder to show aggregate demonstrable value to clients.
2. **Partner buy-in.** Even if training is broadly viewed as improving performance, persuading partners to let their busy associates spend valuable billable hours in training sessions rather than doing client work is itself quite challenging. While email and phone exhortations from firm or practice-group leaders can help, persuading partners is often a one-on-one sales effort to persuade the partner that the associate will learn more in the training session than s/he will by an hour or two of additional hands-on learning under the partner's supervision.
3. **Attorney adoption and application.** Finally, assuming that the training has been designed to be impactful and the associate has managed to attend it, a remaining major challenge is to make sure that the associate actually uses what s/he has learned. As in the opening scenario, generic lectures are too easily forgotten, and PowerPoint presentations and sample handouts are also easily put aside and not consulted in the heat of the fray. The training, along with preparatory and follow-up work, therefore needs to be structured to maximize the likelihood that the associate will apply what s/he has learned in real-life client situations.

Any attorney training program needs to address these challenges. What's the best way to do this?

RAI to Achieve ROI

Ideally, because a firm invests time and money in training programs, it should be able to show clear returns from them and calculate a return on investment (ROI). However, in the law firm environment that can be quite challenging to do in the formal financial sense of ROI. Generally, the best one can do is to show informal anecdotal and qualitative returns.

Consequently, to ensure that our training makes an impact, we have decided to focus not on ROI but rather on “RAI”—Relevance, Adoption, and Impact—using LSA Global’s RAI™ model. Happily, doing so also enables us to address the challenges listed above—clear positive impact, partner buy-in, and attorney adoption—and at the same time puts us in a position to measure ROI when applicable. This white paper will discuss examples of how we have begun to use RAI™ to do this.

First, we provide a deeper explanation of the RAI™ model. LSA Global developed RAI™ to help client companies and firms “move the needle” by improving employees’ actual performance and thereby generating real investment return. LSA Global’s research indicated that most professional and corporate training was not achieving its goals and over 90 percent of training initiatives were failing to meet expectations. Also, based on over 600 training-assessment and measurement projects, LSA found that 80 percent of the skills and knowledge acquired during training were not transferred back to the job without proper reinforcement, follow-through, and accountability. Finally, a recent poll discovered that three out of four CEOs don’t believe that training is impacting their business.

If that sounds surprising, try to remember the last training session that resulted in measurable and sustainable behavior change. Then try to remember a session that had a quantifiable impact on key metrics such as client satisfaction, realization, or new business development. Does the fact that the great majority of training initiatives fail to achieve their goals still seem so far-fetched? The purpose of the RAI™ model is to help raise the training bar and provide a simple blueprint for success.

LSA Global defines RAI™ as a solution with three key characteristics: Relevance, Adoption, and Impact. The process they use is outlined below:

1. **Relevance.** The solution needs to be relevant to (1) the business, (2) the leadership, (3) the target audience, and (4) their supervisors. In law firm terms, a training session needs to be relevant to (1) the firm, (2) the leadership, (3) the associates, and (4) the partners. Note that in many firms (as in ours), stakeholders (1) and (2) are essentially the same, as a leadership team represents the views of the business. By “relevance,” LSA means objectively assessing how important and urgent the solution is to each of those stakeholder groups, and budgeting significant dollars only for the initiatives that have a relatively high degree of importance and urgency for all groups. The Appendix contains more details on how LSA does this.
2. **Adoption.** For behavior to change and results to be achieved, the critical new skills, knowledge, and behaviors must be consistently adopted by the trainees and applied on the job. Depending upon the specific solution, required adoption resources may include items such as skill-gap assessments, individual development plans, leadership overviews, active-learning assignments, supervisor coaching, mastery sessions, tools and job aids, process improvements, performance-metric enhancements, and measurement.

3. **Impact.** While measuring impact can seem daunting at first glance, it actually can be done quickly and easily in many cases. Measurement is a key component to driving accountability for execution and providing actionable feedback for follow-on coaching, typically by the associate’s supervising partner or other attorney. Done right, training measurement should answer three fundamental questions:
 - a. Are the new skills being used? (Adoption metric)
 - b. What difference are they making? (Impact metric)
 - c. What should I do differently? (Individual coaching)

The RAI™ model can enable a law firm training department to make a tangible impact on key metrics such as client satisfaction, realization, or new business development by investing wisely in the learning initiatives that will have the greatest impact. Following this approach also will allow you to increase your credibility and influence with the partners and associates that you are trying to serve.

Wilson Sonsini Goodrich & Rosati Examples

Below are three examples of how our firm has used RAI™ to ensure its training has the desired impact. The first scenario involves junior associates, the second more experienced associates, and the third clients.

Example #1: First-year associate training on avoiding legal malpractice

1. **Relevance.** Wilson Sonsini Goodrich & Rosati assessed the relevance of first-year associate training, and found it to be very high for every stakeholder group:
 - a. **Business and Leadership: Law firms** have an increasingly urgent need to help their first-year associates become effective as quickly as possible because many clients believe that they are not cost-effective. While law school usually gives attorneys a strong foundation of legal knowledge, it rarely teaches them the practical skills needed to represent corporate clients efficiently. While most law schools long have had clinical programs, and some schools are implementing more hands-on, real-world elements into their core curricula, law school is still largely a classroom exercise rather than an apprenticeship. Law firms as a business, therefore, need to train their first-year associates quickly and effectively.
 - b. **Target Audience: First-year associates** have an urgent and important need to become able and productive quickly. The faster they move up the learning curve, the more responsibility they can take on, the faster they can get the work done, and the fewer mistakes they make.
 - c. **Their Supervisors: Partners**, too, have a strong interest in helping their first-year associates become effective more quickly so that they can meaningfully contribute to client, deal, and case teams. While partners can use a variety of mechanisms—including learning on the job, close partner and senior associate supervision, and “shadowing” (watching more senior lawyers perform key tasks)—formal training can comprehensively and efficiently cover all the material that first-year associates need.
2. **Adoption.** While the relevance of first-year associate training overall was clear, we faced challenges with one particular session from our three-day First Year Academy: Avoiding Malpractice. This session had been rated relatively poorly the last few years, primarily because the format was two hours of dry lecturing that left most new associates a little glassy-eyed. As a result, the positive impact of the particular training session on associate performance was far from optimal.

To maximize adoption, LSA Global helped us revamp this session by replacing the “data dump” structure with a problem-solving format based on the assumption that the new attorneys would engage and retain more if they were (a) dealing with the most relevant malpractice topics, and (b) actively uncovering issues instead of having the issues pointed out to them. We convinced our presenters—our in-house General Counsel and Assistant General Counsel (together, the “GCs”) —that they could cover the same material in a different manner instead of lecturing for two hours and worked with them to create 16 realistic and highly relevant scenarios in four categories: (1) client engagement and conflicts, (2) client communication and files, (3) privilege/opinions and confidentiality, and (4) professionalism and competence. We divided the participants into groups of six per table, each of which would tackle four scenarios.

To kick off the session, the GCs briefly lectured on the four categories and then asked the groups to examine their four scenarios. The room was quiet as the groups tried to figure out how to address the four scenarios in the allotted time. Some decided to work together on all the scenarios; others divided the scenarios among the six people at the table. As they began to dig into the work, some groups were clearly struggling to uncover all the issues, but they weren’t approaching the GCs. So the GCs decided to go to them; each walked up to a table and asked, “What are you stuck on?” The questions began to fly. As other groups noticed the GCs moving about the room, they began to approach them with questions. The GCs were now colleagues in the issue-spotting and problem-solving process. At one point, there was a line of people waiting to talk to one GC while the other moved between tables. These connections between the new associates and the GCs were an unplanned but much-appreciated benefit, since ideally associates should view their GCs as key resources and consult with them when faced with a potential issue.

At the end of the session, each group reported on the issues they found in their scenarios. The GCs added issues that were missed and gave real-life examples of them. The participants were delighted when the GCs said, “You got it!” at the end of a debrief report but also were interested to hear the more complex problems that may have escaped them. Amid cries of “It can’t be over!” the session came to a close. The GCs were pleased with the amount of material that had been covered. They also were delighted that they were viewed as friendly, accessible resources by this group of new associates, who now seemed much more inclined to approach the GCs with questions before problems became critical. And the associate-attendees loved the session—the overall rating jumped from a 3.4 to a 4.3 (on 1-5 scale where 5 is excellent)—and many associates rated it the best session of the entire First Year Academy.

3. **Impact.** Active learning produced better ratings and much-more-engaged attendees, but measuring whether the improved delivery resulted in greater knowledge retention by the attendees or better results was difficult. Nevertheless, from what they experienced during the session, the GCs remain convinced that the attendees learned more and probably retained more than the prior years’ groups. So even though the GCs are normally much more comfortable giving straight lectures, they are eager to use the new active-learning approach again in our next Academy.

Example #2: Legal-research training for mid-level associates

1. **Relevance.** Each stakeholder group in a law firm has a strong interest in getting the most value from their third-party legal-research databases—such as Lexis and Westlaw—as listed below:
 - a. **Business and Leadership: For law firms,** clients have been scrutinizing legal research costs ever more closely. At the same time, law firms obviously need to make sure that their work product is careful, thorough, and well supported by applicable law, all of which requires substantial legal research. Law firms thus face the challenge of doing thorough and effective research while minimizing the cost of doing so.
 - b. **Target Audience: Mid-level associates** are making the transition from having projects assigned to them to controlling certain aspects of a case, and they face pressure to meet increased expectations from their supervising partners regarding ownership of cost and quality issues. Demonstrating that the associates can provide accurate and relevant legal research at a reasonable cost helps to establish in the partners' minds that they know what they are doing and should be given even more responsibility in the future.
 - c. **Their Supervisors: Partners,** too, find legal research training to be highly relevant. In our firm's case, one of our litigation partners saw an opportunity to improve the quality and efficiency of associates' legal research by more tightly targeting the searches and getting the necessary work done more quickly. Attorneys thus trained could cut the third-party research costs passed through to the client and thereby reduce legal bills.
2. **Adoption.** Our challenge was to teach the associates how to improve their search strategies and adopt the teachings in their actual online research so as to materially reduce costs. By talking to senior associates, we produced a list of best practices, and a well-respected sixth-year associate emerged as the ideal presenter. We limited the first class to senior associates and positioned it as a brainstorming session to enable the presenter to effectively share the information with his peers, improve their search strategies, and also gather their ideas for additional resources. The presenter then taught a more polished version of the class to all junior and mid-level associates using not just the lecture method but also active learning. Specifically, the presenter challenged attendees with two research scenarios, and the groups had to analyze and choose which search resources they would use to find the answers, something they routinely would need to do back on the job.
3. **Impact.** Before the class, we thoroughly analyzed third-party research costs incurred by associates over the prior year. We also helped the presenter create a self-assessment tool that associate-attendees would complete both before and after class to show how the class impacted their views on search resources. The results of the class were startling and very positive. First, the self-assessments done before and after class showed that associates previously had been unaware of many of the more cost-efficient research options, but now were more aware of those options and more inclined to use them. Second, the average online research fees incurred by those who attended the class decreased by 47 percent in the three months after the class. Finally, the partner who originally asked us to do the class reported after the session that he was seeing more targeted and thorough research.

Example #3: Employment law training for clients

1. **Relevance.** Like many law firms, Wilson Sonsini Goodrich & Rosati is very interested in working with clients to spot legal issues early and deal with them efficiently. To help clients do the initial spotting and issue resolution on their own, we have invested in an extensive client training program. The relevance for each stakeholder group is listed below:
 - a. **Business and Leadership: The law firm** is constantly looking for ways to add value to clients without increasing client bills. Providing relevant, timely, and free education to clients is one way to do so, and it has the added benefit of highlighting the firm's expertise.
 - b. **Target Audience: Client general counsels (GCs)** can find it hard to get relevant, timely education, for themselves and their teams, at a reasonable cost. GCs are also regularly under pressure to use outside law firms in an efficient and cost-effective manner, handling as much legal work as possible themselves.
 - c. **Their Supervisors: Client C-level executives**, who supervise the GCs, depend on their GCs for guidance on a wide range of legal issues that affect their company's business. It is particularly important to the executives that their in-house law departments help spot potential legal problems early and help resolve them quickly before they escalate into expensive, time-consuming projects.
2. **Adoption.** Accordingly, our firm provides formal training for our clients through several programs. For example, our College for Clients consists of bimonthly sessions in which we train in-house lawyers and their staff on the fundamentals of legal processes, so they can accurately handle routine issues on their own and cost-effectively use our firm's services on more complex matters. Because we were particularly eager for our clients to increase their adoption of the session material and thereby reap the benefits, we decided to increase the active-learning delivery method to increase attendee learning and retention.

One of our most popular College for Clients classes has been the Employment Law session. Nearly all attendees find the subject highly relevant and more interesting than most legal topics, and our Employment Law group had done an excellent job of presenting practical, up-to-date content. But while open to Q&A, the presenters traditionally had been reluctant to involve the audience in the discussion.

All that changed with our April 2010 session. We encouraged the presenters to refocus their content and build in some activity to increase attendee engagement and takeaways. They responded by revising their presentation to focus on three segments: "At the Door" (issues before and during the hiring process), "In the Door" (post-start date issues), and "Out the Door" (issues with exiting employees). They also created scenarios within each segment that were realistic yet complex, with layers of issues that were guaranteed to challenge the most astute participants. The presenters further decided to seat the participants in groups at tables so that they could work together on each scenario, following a short set-up lecture that outlined the applicable laws and regulations.

The new format worked extremely well. The participants listened carefully to the first short lecture. The presenters then outlined the first scenario and challenged the participants to find as many issues as possible in just five minutes. As the noise level rose in the room, it was clear that the participants were very serious about uncovering as many issues as they could. When the time was up, the groups weighed in with their findings. The presenters were delighted with the level of involvement and praised the participants for their diligence. Each additional round of discussions saw more participation and involvement, so much so that many attendees were clearly disappointed when the session ended. The subsequent ratings were among the highest ever recorded for a College for Clients event, and numerous attendees commented on how much they enjoyed the seminar. They praised the knowledge and the delivery style used by the presenters, particularly the excellent use of scenarios. One attendee commented that it “was one of the best MCLE presentations I have attended in the past five years.”

3. **Impact.** It was evident from the attendees’ conversations with the presenters immediately after the seminar that the new active-learning approach had stimulated attendee involvement in the class material far more than prior College for Clients seminars. The presenters said that the attendees seemed much more likely to apply what they had learned, to the ultimate benefit of themselves and their companies. The presenters also commented that, in the three months following the class, they received more calls from client-attendees than following prior lecture and Q&A sessions. Furthermore, the presenters said the clients who called showed “greater investment in their relationship with our firm as solution-provider,” i.e., the active-learning approach showed off our firm’s knowledge better and got the client-attendees better connected to the presenters, making it more comfortable for the client-attendees to later pick up the phone and call one of the presenters with an issue.

Conclusion

Like other law-firm training departments, we face the significant challenge of helping to increase our attorneys’ knowledge and skills quickly and efficiently in order to provide maximum value to clients. As the above examples show, we have found the RAI™ model extremely useful in assessing the relevance of specific training topics and in designing the instruction format to boost the adoption and increase the impact of key training programs. We look forward to infusing our entire training program with the model and to the ultimate positive outcomes for attorneys and clients that it can help deliver.

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Appendix: Assessing Relevance

To assess relevance, LSA Global recommends using the matrix below to ensure alignment with the priorities of key stakeholders.

LSA Training RAI™ MATRIX

Urgency ↑	III. Validate Urgency	I. Budget for Adoption & Impact
	IV. Do not Budget	II. Budget for Adoption & Impact
	Importance →	

For each potential learning initiative, plot the importance and urgency for each of the four stakeholder groups. Then review and validate the chart with the key stakeholders and adjust, plan, and budget accordingly.

As an example, LSA recently used this matrix at a Fortune 100 technology company, which was planning to invest in a “Transition to Management” workshop for all new managers. The training director said that it was her top priority and wanted to invest approximately \$500,000 over nine months. LSA worked with her to map her initiative on the matrix, which showed (in about 15 minutes) that she needed to reevaluate her learning priorities and budget.

LSA Training RAI™ MATRIX

		Target Audience
Urgency ↑	III. Validate Urgency	I. Budget for Adoption & Impact
	Leadership	
	IV. Do not Budget	II. Budget for Adoption & Impact
	The Business	
	Importance →	

Specifically, while the initiative was very important to her and a group of new managers (the target audience), it was relatively unimportant to everyone else. Based upon our discussion, the training director shared the chart with stakeholders and decided to take a different, less expensive, and ultimately more effective approach. Fifteen minutes and a simple model saved her and her organization hundreds of thousands of dollars, months of time and frustration, and possibly her reputation with key stakeholders.

For more details on how LSA Global uses RAI™ to help clients improve their training programs, please visit <http://www.lsa-global.com/about/Training-RAI-Relevance-Adoption-Impact.asp> or contact Tris Brown, President and CEO of LSA Global, at TBrown@LSAGlobal.com or 925-258-0582.

