Professional Development Consortium

# Linkletter

THE OFFICIAL PUBLICATION OF THE PROFESSIONAL DEVELOPMENT CONSORTIUM

PDC

Spring 2017, Vol. 4, Issue 4

## CHAIR'S NOTE

by Amy Hancock

One of the greatest benefits of being a PDC member is the opportunity to make connections with the best people in our field—not only at our two annual conferences, but on a daily basis via e-mails and telephone calls and through our local groups. These connections allow us to share resources and advice and build communities with fellow professionals in our industry.

I'd like to take a few minutes to reflect on some of the other wonderful benefits that were made available to PDC members during the past year.

- Active PDC-LINK Listserv—Our Listerv provided a forum for the exchange of almost 1,000 questions and resources! Thank you to everyone who answered these Listserv posts or compiled responses to your inquiries to share with all of us!

- Two Successful Conferences—Each year, our conferences are truly a "can't miss" experience, full of opportunities to learn from and engage with experts in our field and have fun with colleagues. Our 2016 Summer Conference in Naples, Florida, and Winter Meeting in Washington, D.C., were no different. For those who were not able to attend, I encourage you to take some time to view the excellent resources provided by our speakers in our conference archives. I hope you will join us this year for our 2017 Summer Conference in Austin, Texas!

## Inside: PDC Linkletter





A publication of the Professional Development Consortium (PDC).

MANAGING EDITOR
Milana Hogan
Sullivan & Cromwell LLP

Address article submissions to newsletter@pdclegal.org.

# CHAIR'S NOTE

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by Amy Hancock

- Addition of New Membership Categories—Our new membership categories will bring fresh ideas, knowledge, and perspectives to our organization and benefit each and every PDC member. I am already looking forward to hearing from some of our Alumni and Alliance members at our 2017 Summer Conference, and I am sure there will be much more to come!

Now that our membership renewal letters are out and we are preparing for the start of our 2017-2018 membership year, I want to take a moment to thank each and every one of you for your participation in the PDC. Our members and volunteers are our greatest resource—they are what makes us the go-to organization for legal PD professionals.

I look forward to engaging with all of you over the next year as we contuniue to enhance our skills through our membership in the PDC.

Sincerely,

Amy Hancock
Chair, Board of Directors

# Welcome to Our New Members

Please join us in recognizing the following PD professionals, who became PDC members between December 1, 2016 and March 1, 2017!

**Lynn Baronas**, Shipman & Goodwin LLP

**Robert Bodendorf**, Baker, Donelson, Bearman, Caldwell, & Berkowitz, PC

**Christine Brennan**, Finnegan, Henderson, Farabow, Garrett & Dunner, LLP

**Emily Chang**, Fenwick & West LLP

**Katie Creedon**, Wolf, Greenfield & Sacks

**Jennifer Dekker**, Hopkins & Carley

**Stephanie Fitzgerald**, University of Richmond School of Law

**Paul Giangola**, Dechert LLP

**Patricia Hennessy**, Hennessy Consulting Group

**Morgan Kelly**, Finnegan, Henderson, Farabow, Garrett, and Dunner, LLP

**Robert Kramer**, Fennemore Craig, PC

**Meagan McGovern**, Pepper Hamilton LLP

**Kristine McKinney**, Fish & Richardson PC

**Sophie Mohrmann**, Williams Mullen Clark & Dobbins

**Michelle Nash**, Hogan Lovells LLP

**Molly Peckman**, Molly Peckman Training & Development

**Jennifer Ryan**, Morgan, Lewis & Bockius LLP

**Stacey Schwartz**, Schwartz Coaching & Consulting

**Sarah Shenfeld**, Paul, Weiss, Rifkind, Wharton & Garrison LLP

**Mollie Wilmes**, Fried, Frank, Harris, Shriver & Jacobson LLP

**Arna Zohlman**, Wilmer Cutler Pickering Hale & Dorr LLP

**Renew your membership for our 2017-2018 membership year today!**
**Click here to login and then select "My Transactions" to view your membership order.**

# Join us for our 2017 Summer Conference!

This year we look forward to meeting you at our 2017 Summer Conference at the Four Seasons Hotel in Austin, Texas! Links to register as well as a summary of our conference schedule are below. For a complete agenda, including speaker information and session descriptions, visit our conference website. **Register today!**

## Thursday, July 20

**New Member / First Time Attendee Welcome Reception**

**Keynote** - A Jazz Lens: Lessons in Communication, Collaboration and Teamwork from the Swinging World of Music

**Concurrent Sessions**

**Session A** - We Hear You Want Practice-Ready Attorneys, but Are You Ready to Help Law Schools Put That into Practice?

**Session B** - Boosting Engagement and Retention of Women Lawyers through Leader Development

**PDC Talks**

- Black Ops & Stealth Maneuvers: Getting Big PD Things Done on the Sly
- Talking Traps

**Concurrent Sessions**

**Session A** - The Topic No One Wants to Discuss and Must: High Functioning Substance Abusers

**Session B** - Business Acumen for Lawyers - What Clients Expect, What Lawyers Want and How PD Can Make it Happen

**Welcome Reception**
**Small Group Dinners**

## Friday, July 21

**Plenary** - Innovations in PD

**Concurrent Sessions**

**Session A** - Documents on a Diet: Crafting Lean Law Firm Communication

**Session B** - Adapting Project Management Principles & Tech Tools to PD Management

**Lunch**

**Concurrent Sessions**

**Session A** - Innovative PD

**Session B** - Making Outplacement a Last Resort: Best Practices in Transitioning Associates

**Roundtable Discussions & Ask the Experts**

**PDC Talk**

- You Need a Brand, Man! Why a Personal Brand and Entrepreneurial Mindset are Critical to the Success of PD Staff and Law Firm Associates

**Large Group Dinner**

## Saturday, July 22

**Plenary** - We CAN Get Some Satisfaction: A Practical Approach to Improving Lawyer Morale and Engagement

**Concurrent Sessions**

**Session A** - Managing Change: Navigating Organizational and Personal Transitions

**Session B** - Learning Leadership

**Plenary** - Millenials: Disrupted or Disruptive?

**PDC Annual Membership Meeting** (members only)

# See You This Summer!


# Register Today for Early Bird Rate!

## Write for the PDC Blog

The PDC is looking for its members to write for the Blog! If you are interested in contributing a personal story, recent/past training event, news about your firm, or anything relevant to our industry, please contact Sally Burroughs at sburroughs@pdclegal.org or visit the PDC Link Blog page at http://www.pdclegal.org/blog for further details!

# THE TRIALS AND TEMPTATIONS OF TAILORED SKILLS TRAINING

*by Ross Guberman*


## Ross Guberman

A former lawyer, editor, and award-winning journalist with degrees from Yale, the Sorbonne, and the University of Chicago Law School, Ross has helped tens of thousands of lawyers and judges write, edit, and mentor more effectively. He also immerses himself in the professional development of lawyers generally and holds a CPLP™ certification from ATD (Association for Talent Development). Ross has spoken at many lawyer-development conferences as well. His full bio is here: www.legalwritingpro.com/bio.


As I leafed through a stack of junior associate bios the other day, two things struck me. First, either attorneys are getting younger and younger or I'm getting old. And second, although the faces change, the impressive bios all start to sound the same. Sure, one associate externed for a judge whom another associate interned for. And one associate was articles editor for an international law journal while another edited articles at a journal of international law. But still.

Of course, once you interact with these same associates, their individuality comes to the fore. Some waltz into the training room with aplomb, armed with questions and brimming with enthusiasm. Others slump in the back row, head sinking into the handout at every challenging exercise. But almost all these associates will participate in the workshop and at least claim to enjoy it. So you start to doubt yourself, wondering if you were just imagining that their body language reflected different levels of skills, interest, or confidence.

But it turns out that you're not imagining it. If anything, most of us underestimate the vast differences in skill level among associates in the same class. Competency models are a great first step, but they, too, cluster associates of the same year much closer together than skills alone would dictate.

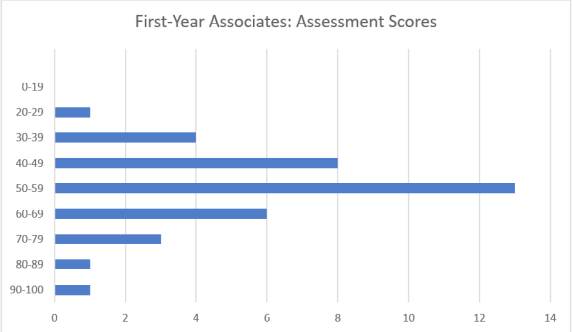
"You Get What You Measure," as Scott Westfahl says. And if you want to measure a hard skill such as writing, your best bet is a standardized assessment that doesn't know or care who you are, where you went to school, how long you've been practicing, or even what your supervisors think of you. Objective instruments also avoid the halo effect, the reverse halo effect, the "everyone is above average syndrome," and the subjectivity, even unfairness, of attorney evaluations.

What's more, if you can prove that attorneys with demonstrated writing skills get much higher scores than do attorneys as a whole, it's tough to argue with these measures. And that's exactly what can make an objective assessment daunting: Imagine being told that your writing skills put you in the bottom 20 percent of BigLaw attorneys. But then again, wouldn't it be worse not to know—and not to get a chance to improve your skills until it's perhaps too late? On the other hand, what if you never thought of yourself as a particularly strong legal writer (female and minority associates, in particular, often underrate their skills), but it turned out that you had exceptional—and untapped—talent?

### Knowledge Is Power

The beauty of knowing where a given associate stands is that you can tailor training to just the right level of difficulty—something that's hard to do in a live-training setting.

Why is this so important? Let me give you a sense of the huge range in writing abilities in a typical first-year class (this "class" is a composite of actual recent first-year classes at three AmLaw 100 firms).




To give you an idea of why this distribution matters, the average BigLaw associate score is 52, the average law student score is 38, and the average BigLaw partner score is 69. And associates sent to me for one-on-one coaching score much lower on the whole—inching toward the average score for law students—than do associates in general.

## Just in Time, Just Right

Armed with this objective data, we can now place each attorney in a suitable online training regime. Even if the assessment proves to be off base, you'll know, because the attorney will get far more questions right or wrong in the training modules than would have been expected. A quick click on a trackpad rights the ship.

There are broader professional development benefits as well. Over time, I've figured out exactly what skills the lowest-performing associates lack when they pass through the gates of law school or clerkships. One thing that's surprised me is that when attorneys who get poor evaluations for writing take my assessment, in addition to having lots of trouble on straightforward writing questions, they are far more likely than top performers to see flaws in sentences that are just fine. That tells me that they're also wasting far too much of their limited editing time. Top performers, for their part, are good at more than just solving hard writing problems and identifying subtle errors. They also excel at tracking and matching other writers' styles, making them better equipped to please partners and clients alike.

## What Would Freud Say?

Alas, there are challenges that I have yet to solve. For one thing, how do you get leery associates to participate in online training? It's one thing to say, "Please show up in Conference Room 12-B at 9 a.m. for a contract drafting class." They either show up or they don't. But it's another matter entirely to say, "Here are some great self-paced resources. Please make the most of them."

Would you be surprised to learn that the top performers are the ones who are the most likely to take advantage of these training opportunities, and that the bottom performers are the least likely? Maybe not, you say, because associates will be defensive about low scores and confident about high scores. But I did an experiment this fall with several firms: Unlike in the past, I didn't share the assessment results with the associates and instead just placed them at the proper online training level. Lo and behold, the weaker scorers still did the exercises less often than everyone else. So what's the solution? I'm all ears.

There's another challenge, which I will pose as a rhetorical question: Deep down, do firms really want to know that some of their hires need help?

The third (and final) challenge is related. From recruiters to PD professionals to partners to firm management, a lot of people are incredibly curious, shall we say, about how their associates perform on the assessment and on the follow-up training. It can be hard to balance privacy rights (however they might be defined) with the employer's desire or need to know.

All that said, we should remind ourselves that online measurement and tailored training don't themselves create any skill gaps. They only identify the gaps and work to fill them. Of course, we will always need live training. If anything, e-learning and measurement present some obstacles that live training does not. But if we can overcome these psychological hurdles, e-learning that tracks and then boosts skill levels will only grow in its appeal to every part of the lawyer development cycle.

# Access Recordings of our 2016 Winter Meeting Sessions Online

Thank you, Abila, for providing us with recordings of our 2016 Winter Meeting sessions! Members can view our Winter Meeting sessions through Abila's Freestone platform here.

## Recorded Sessions include:

- The Power of Networks: Drop the "ing" and the Rest is Magic - Presented by Scott Westfahl, Harvard Law School Executive Education
- Assessing, Maintaining and Nurturing Impactful Relationships - Presented by Werten Bellamy, Stakeholders, Inc.
- Delivering Value and Enhancing Relationships through Client Education Programs - Presented by Karen Bell, McCarthy Tétrault LLP
- Using Live Events to Facilitate Connections - Presented by Erin Walczewski, Cooley LLP and Sonya Gavankar, the Newseum
- Creating a Workable Relationship Building and Maintenance Plan - Presented by Jennifer Greiner and Joi Bourgeois, Greiner Consulting

## Renew Your PDC Membership Today!

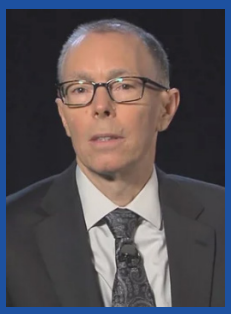
It's time to renew your membership for the 2017-2018 membership year! Members can renew online, via check, or over the phone by calling us at 703-506-2027.

## Login to renew your membership today!

If you have any questions, please contact Sally Burroughs at sburroughs@pdclegal.org.

# CREATING AN EFFECTIVE CLE PRESENTATION

*PLI Interview with Will Thalheimer*



## Dr. Will Thalheimer

In a series of interview and articles, our 2017 Visionary Corporate Partner, Practising Law Institute, will bring four expert perspectives to our members. In this inaugural interview, J.C. Kinnamon, Ph.D., PLI's director of research and development, interviews Will Thalheimer, Ph.D., a workplace learning expert who has consulted with PLI on several program improvement initiatives.

**PLI:** *What are the keys to delivering an effective CLE program presentation?*

**Dr. Thalheimer:** Let's start with the obvious things. As a CLE instructor, you need to know your audience and provide them with content that is relevant to their work. Don't bore them with fundamentals if they're already knowledgeable, but don't forget to put new and complex concepts into perspective. Avoid presenting a series of bullet points—bullets will kill your audience. Instead, tell stories, show relevance, provide examples, ask questions, ask for questions, and get your audience thinking deeply.

If you want to help your learners remember what you're teaching, you'll have to do more than just talk. You'll have to engage them in making decisions. In a sense, you want to give them practice USING the wisdom that you've taught—NOT just listening passively. By wrangling with the content that you present—either through answering questions, debating options, or thinking about boundary conditions—you'll help your learners solidify what you've taught.

The bottom line is that you won't have done much good if people learn from you, but forget what you've taught in a day or two. To support their retention, you have to get them engaged.

**PLI:** *What should be the goal of an effective presentation?*

**Dr. Thalheimer:** Here's what we most often aim for: (1) good content, (2) attentive learners, and (3) learners who understand what we've taught.

That's a good start, but there are at least two other goals you should have: (4) learners who can make decisions with the information you're teaching, and (5) learners who can remember the information you've taught.

If you really want to be a superstar, you'll aim for doing two more things—but please note that these are often extremely difficult, if not impossible, given the constraints of CLE logistics: (6) giving learners specific guidance on how they can take the new information and use it in their work, and (7) motivating learners to engage in additional learning on their own initiative.

**PLI:** *Is there a professional discipline associated with effective presentations, from a learning standpoint?*

**Dr. Thalheimer:** Yes. It's called "instructional design," and people can get master's and doctoral degrees in it. Indeed, some instructional designers specialize in classroom-based learning, while others focus on learning through technology—for example, from computers or smartphones. Recently, instructional designers have also begun supporting learners as they learn on the job.

Instructional design blends science and art. Research from many fields is utilized, including learning, memory, human-computer interactions, organizational psychology, persuasion, and other social sciences. Good instructional designers also bring other skills into their work, including graphic design, aesthetics, web design, writing, advertising, marketing, etc.

Very few of us—indeed, even very few instructional designers—are good at all these skills, so for more complex learning initiatives, instructional designers often work with teams of people.

Fortunately, when we're making a presentation, we can follow a few simple guidelines to radically improve our effectiveness.

*"Good instructional designers also bring other skills into their work, including graphic design, aesthetics, web design, writing, advertising, marketing, etc."*

**PLI:** *I know you have watched a lot of recordings of leader-led CLE programs over the years. From your perspective as a learning researcher and consultant, what is one suggestion you could make to presenters that would improve what program participants take away?*

**Dr. Thalheimer:** I've watched dozens and dozens of hours of CLE programs, and several things have struck me. First, the teachers generally know their stuff and are usually passionate and engaging presenters. That's wonderful, of course!

But I also often see some problems. The biggest problem is that instructors often try to teach too much content. This is, by the way, the biggest flaw in the workplace learning field. We ALL try to cram in too much content. I do it, too!

The next time you create a presentation for a CLE program, cut out 40% of your content and drill down deeper into the content areas you do cover. If you feel bad that they're missing some valuable nuggets of content, you can provide your learners with a link to an article to read. Remember, you'd rather teach 6 topics really well and have people remember 5 of those topics than teach 10 things quickly and have people remember only 2 of the topics.

How do you drill down deeper? Provide them with examples of effective and ineffective methods, tell relevant stories, provide hypotheticals, have folks debate the options, have them work in small groups, ask them what they agree with and what they're worried about. In short, prompt them to make decisions about the content you're teaching them. Passive listeners may be great in a symphony, but active learners will not only be jazzed by your engaging class—they'll take more of what you've taught back to their work.

**PLI:** *What are the trends for the future? What should we expect?*

**Dr. Thalheimer:** The future will bring self-driving cars and more intimate learning. You may still be asked to play the role of "sage on the stage," but you will also be challenged to make classroom learning more engaging, more relevant, and more effective in supporting long-term remembering. Also, as learning technologies get better and better, your learners may decide they don't want to schlep to a classroom; they'd rather engage with you on their smartphones or tablets or through audio assistants like Amazon's Alexa, Google's OK Google, etc. Obviously, you won't have to be live 24/7, but you may be tasked with recording little snippets of video, creating scenario-based hypotheticals, and working with instructional designers to embed these learning morsels into a stream of interactions that feels intimate and personal to your learners.

With all the time they'll gain when their cars do the driving, they'll be more inclined to spend time learning—and you'll have more of a chance to help them in their work and careers.

**PLI:** *Is there any final cautionary advice you want to share?*

**Dr. Thalheimer:** I've mentioned a few things already. Avoid too much content. Avoid talking too much—instead, get your learners making decisions. Avoid bullet points.

Here are a few more mistakes to avoid. Don't present lots of information all at once or all on one slide. Your learners won't know where to look on your slides. Use simple slide animations to reveal one thing at a time. Don't go crazy with fonts or colors. Keep it simple. Don't use your company's slide templates—you don't want to clutter the screen or lose space for more important information. Okay, you can use your logo on the first and last slide. That's it. Think of it this way—when you go see a movie, is the movie studio's logo visible throughout the movie? No, of course not.

Don't fall for the biggest myth in learning—learning styles. At some point, you might be told to cater to your learners' different learning styles. But here is the thing: there is now a ton of research to show that doing so is unnecessary and probably counterproductive. Instead of catering to so-called learning styles, remember to give your learners realistic practice making real-world decisions.

And finally, whatever you do, don't read your presentation. You'll not only look like a rookie, but your audience will zone out as you drone on and on.

Okay, one more thing—have fun! When you have fun, your audience will be more engaged and they'll learn more. And, well, you'll have more fun if you're having more fun!

**PLI:** *Thank you Will!*

# Thank You!

Thank you to everyone who participated in our 2016 compensation survey. View our summary report online today!