Professional Development Consortium

Linkletter

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CHAIR'S NOTE

by Don Smith

After a great summer capped by record attendance at the PDC Summer Conference in Portland, Oregon, we are excited to move into the fall months as we prepare for all of the great projects and programs to come. Thank you to all of our attendees, speakers, and sponsors who joined us in Portland. If you have not seen the photos from the Summer Conference, you can view them on the PDC's Flickr account; it's fun to relive such wonderful memories. If you enjoyed this year's conference, you can start looking forward to next year's gathering! We hope you can join us July 11–13 in Nashville, Tennessee. Save the date!

Registration for the PDC Winter Meeting is open. You won't want to miss the program, "M.A. in a Day," that will take place in Washington, D.C., November 28. You will learn about how concepts, disciplines, and applications from various Master's degree programs are adding valuable perspectives and enhancements to our professional development community and talent development efforts. You can learn more about the Winter Meeting on the PDC website.

We are pleased to once again partner with Calibrate Legal on the development of our Salary Survey and look forward to sharing the results with our members in the coming months. We realize the results of this survey are valuable to our members and we want to continue to offer this resource. In addition, we will soon be unveiling our new online community platform that will bring our PDC network closer together by providing better avenues for communication.

We hope you enjoy this edition of our Linkletter and we look forward to engaging with you in the coming months through our conferences, meetings, programming, and online community. And if you do not already, follow us on Twitter and Facebook and via our LinkedIn group.

Sincerely,
Don Smith
Chair, Board of Directors

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DOES MENTORING STILL MATTER?

by Ida Abbott

Ida Abbott has been helping employers develop, manage, and retain legal talent since 1995. She also serves as a mentor and coach to high achieving individuals seeking professional success. Ida has long been recognized as a leader in the fields of mentoring and sponsorship, leadership development and, legal talent management, and is a Fellow of the College of Law Practice Management.

I have just completed a new edition of my 2000 book, *The Lawyer's Guide to Mentoring*. The underlying premise of the new book is the same as in the original: mentoring is essential for lawyers. But considering the changes in the legal profession during the nearly two decades since the book was first written, how valid is that premise today?

Lawyers now operate in a very different world, and the time demands and competitive pressures of practice are far more intense. While changes were starting to appear in the early 2000s, the pace of change today, especially in technology, attorney-client business relationships, and case management expectations, is dizzying. Communication and training are conducted remotely, online, and in short bursts. Job tenure is brief, career paths are no longer clear or straightforward, and growing numbers of lawyers work in jobs and for legal service companies that did not even exist 20 years ago.

Can mentoring relationships flourish in this new environment? Is it still important that they do? The answer to both questions is yes, of course—mentoring remains an integral part of lawyers' professional development and career success. It remains vital for employers who want their lawyers to possess the professional qualities, skills, and attitudes required to serve clients and become leaders. And it is critical for society as a means of ensuring that practice competencies and professional values are transmitted to new generations of lawyers.

But like everything else, mentoring must adapt to the new realities of modern practice. The legal profession is indeed developing new and creative ways to make mentoring available and relevant to contemporary lawyers. By shifting emphases and utilizing new tools and technologies, lawyers are finding ways to tease out some of the benefits of mentoring in more efficient ways. This includes new concepts of what mentoring is and can be, as well as how lawyers engage in mentoring practices.

WHAT DOES MENTORING LOOK LIKE TODAY?

Mentoring for lawyers is a collaborative learning process based on a personal relationship in which one person helps another develop as a professional and achieve career goals. The personal relationship aspect is what distinguishes mentoring from other learning and development processes and also what makes it so powerful. It is the defining aspect of mentoring, as is the professional focus of the relationship when it is based in the workplace.

In the past, mentoring was seen as a one-on-one process that was long term, top-down, and all-purpose. It was directed primarily at new and junior lawyers and concentrated on their professional learning and development. Today all of those factors have changed, as follows:

- Mentoring can take place between two people or within a group.
- Mentoring relationships are formed and conducted online and through social media as well as in person.
- Mentoring relationships are collaborative and less hierarchical. Mentors and mentees learn from each other and sometimes switch roles entirely, with the junior person serving as mentor and the senior person as mentee. Some mentors are peers.
- Long-term, transformative mentoring relationships are still desirable, but increasingly rare; more lawyers are mentored through short-term relationships and even episodic encounters that simply provide information or professional support.
- Mentoring "networks," "constellations," and "boards of advisors" have become more valued than a single mentor, as they provide multiple perspectives and address various professional needs more effectively than any single individual can.

- Mentoring focuses on professional advancement as well as professional development and is a career-long process. Lawyers seek mentors at every stage of their career, whenever they face new challenges, roles, responsibilities, or opportunities—including using mentors to support them in leadership transitions and retirement.

- Mentees are more strategic and proactive in selecting mentors, rather than waiting for mentors to reach out to them.

Another feature of mentoring that has adapted is based on the distinction between mentoring for professional learning and development and mentoring for career advancement (or what we now refer to as sponsorship). Mentoring for professional development remains vitally important throughout a lawyer's career, but especially in the early years. As lawyers gain experience and try to move up in their firms, the competition for partnership and leadership is greater, and the stakes are higher. At those junctions, lawyers need mentors who can be strong, influential, and effective advocates, or sponsors.

But not every mentor is qualified or positioned to serve as a sponsor. Sponsors must have sufficient gravitas and influence to persuade decision makers, as well as the connections and resources to make key introductions and create career-enhancing opportunities. Beyond mere advocacy, they must be positioned to make their advocacy produce concrete benefits. This makes sponsors both scarce and highly valuable.

Research shows that women and minority lawyers with sponsors rise as quickly and as high as white men; however, women and minority lawyers lack sponsors. They can find mentors, but they do not receive the kind of career advantages from them that sponsorship provides. As a result, their careers are hindered or stall completely.

Firms have long focused on mentoring as a way to promote inclusion and retain women and minority lawyers. Today, firms are concentrating on making sponsorship more widely available to diverse lawyers for those same purposes, through formal programs as well as informal efforts.

NEW MENTORING MODELS

These adaptations are necessarily changing the nature of mentoring for many lawyers. As a rule, the old-fashioned, long-term mentoring model in which a wise older lawyer teaches, supports, protects, and champions a junior lawyer remains the ideal. That ideal continues to be reflected in efforts to promote sponsorship, which is much like the traditional model of mentoring. But like many ideals, it is rarely achieved, so the new approaches that are emerging are intended to provide at least some mentoring benefits for more lawyers.

While many of these new approaches build on or derive from the traditional notion of mentoring, some are redefining what we consider mentoring to be. For example, some new models break mentoring down into smaller components (such as advice) and accept a narrow aspect of mentoring—say, one exchange of e-mails about how to handle a specific legal matter, ethical dilemma, or job opportunity—rather than aiming for a broader, more inclusive process.

These are compromise measures and not adequate substitutes for the trust- and relationship-based mentoring that lawyers need for professional and career development. They are also unlikely to generate the sponsorships lawyers desire when they seek promotions or raises. But for many lawyers, the trade-off of substance for availability makes sense. In a fast-moving, highly mobile world, these approaches fill an important need—and by bringing lawyers together, they provide opportunities for deeper mentoring relationships to start.

If intense, high-quality mentoring is rare and available to relatively few lawyers, these compromise versions help a large number of lawyers acquire sufficient guidance, role models, and support to move forward as professionals. What's more, by combining multiple moderate-quality relationships in different programs and formats, lawyers can accumulate a variety of benefits from many different sources. In some ways, this accumulation can be more valuable than traditional mentoring because it provides greater breadth, wider networks, and broader perspectives.

Some of these new mentoring models include the following approaches, which may be used independently or combined:

Peer mentoring. Peer mentoring is a non-hierarchical form of mentoring in which two or more colleagues mentor and learn from each other through a learning dialogue. Peer mentors can perform any or all of the functions of traditional mentors. In their mentoring relationship, peer mentors are on an equal footing. One may be somewhat more senior in rank or experience, but they are equals when it comes to learning from and supporting each other.

Group mentoring. Mentoring increasingly occurs in groups rather than pairs. There are several variations, including peer group mentoring. The most common group mentoring structures are mentoring groups and mentoring circles. The terms are often used interchangeably, which is confusing, but they have one significant difference: mentoring groups are led by designated mentors, whereas in mentoring circles, no one is designated a mentor—instead, members either rotate leadership, or no one takes the lead.

Reverse mentoring. Reverse (or "upward") mentoring pairs a junior person as mentor with a partner or executive as mentee. The purposes of switching roles are to facilitate knowledge flow between senior and junior lawyers and to encourage the juniors to share their perspectives and specialized knowledge with the seniors.

Virtual mentoring. In virtual mentoring, mentors and mentees interact primarily through technological channels

rather than face to face. Traditional mentoring occurs in person, usually between two people working together in the same office. But for people in remote areas, niche practices, or multi-office firms and for some telecommuters, face-to-face mentoring may not be practical. Plus, a growing number of law firms and alternative legal services providers are entirely virtual, with no physical offices.

Episodic mentoring. Episodic mentoring (also known as "situational," "flash," or "just-in-time" mentoring) occurs through a single brief learning encounter between an experienced individual and someone less experienced. In these encounters, the more experienced person helps the other address a professional issue or question, but there is no ongoing relationship between mentor and mentee (which is the hallmark of traditional mentoring).

Social mentoring. Lawyers can learn from numerous experts in a variety of fields using internal knowledge management (KM) systems, the Internet, and social media. They can create profiles and list keywords associated with their areas of expertise, search the profiles of others for subjects that interest them, and identify possible mentors among the search results. They then reach out to potential mentors with their questions, post their own contributions to the discussion, and use these interactions to build connections and engage in collaborative learning.

Some of these new models can provide significant learning and career benefits. Many mentoring circles, for example, create professional support networks that contribute greatly to members' professional success and satisfaction, and they continue to provide support for years. Other models, such as episodic mentoring, consist of little more than information transfer, so it is hard to consider them mentoring at all.

However, as definitions of mentoring evolve to meet changing attitudes and work conditions, even episodic mentoring may be seen as an expedient way to help lawyers learn, develop, and build professional connections in a world where everyone is constantly on the move and few have time to form more profound mentoring relationships. It supports the reality that instead of a single senior mentor, lawyers today need a network of mentors who provide different kinds of career development and support. And since it connects people with shared interests, it may lead to the development of a deeper mentoring relationship.

Similarly, these new approaches increase access to lawyers who do not have the time or desire to engage in traditional mentoring but want to help other lawyers develop and progress. Some senior lawyers welcome the chance to help junior lawyers on a narrowly focused, short-term basis. They also appreciate that they can learn and benefit from eager, inquisitive junior lawyers. Many younger lawyers have abilities and attitudes that will equip them well for the changes sweeping the legal industry and that potential mentors need to have as well, such as cultural competency, the ability to work with diverse and dispersed teams, ease with technology, an interest in innovation, creativity, and flexibility.

DRIVERS OF CHANGE

These changes in mentoring are being driven mostly by younger lawyers who feel the need for change, speed, and agility more than their mentors do. It isn't that they view traditional mentoring as obsolete; it is that they see it as unattainable and, in many situations, irrelevant. Many younger lawyers are impatient and want advice and support without a deeper relationship. Plus, the advice they want is forward-looking, to help them practice in today's rapidly changing world. They are not much interested in hearing about what succeeded in the past.

Many younger lawyers want to learn from anyone, anywhere, at any time who may have something of value to offer them. Some believe in "self-mentoring," a result of being told by employers (and parents and others) to take control of their careers. Knowing they need to be self-directed and self-reliant, they want employers to provide tools, opportunities, and culturally supportive conditions for mentoring, but they expect to find the mentors they need when and only for as long as they need them.

Many changes are also being driven by firms, organizations, and state bar associations that recognize the critical importance of mentoring and are searching for efficient ways to make it available to large groups of lawyers. For example, one of the most significant new developments in mentoring is the spread of lawyer mentoring programs operated at the direction, or under the auspices, of state bar associations and state judiciaries. More than 20 states now have such programs, and 5 of them require participation before a lawyer can become licensed to practice in the state. These programs are intended to protect the public by involving experienced practitioners in helping young lawyers become competent, effective, and responsible lawyers, especially with regard to the practicalities and ethics of law practice. To reach large numbers of lawyers across geographical distances, state bar programs sometimes use techniques such as group mentoring and virtual mentoring.

As the legal profession and legal practice continue to change, mentoring will continue to change as well. The traditional model of mentoring based on a strong personal relationship and substantial career benefits will always be preferred, and it will materialize for some lawyers. But all lawyers can find some benefit in these new models and in other innovative approaches yet to come.

TRAINING THAT STICKS

by Steve Armstrong and Tim Leishman

Steve Armstrong and Tim Leishman are principals of Firm Leader Inc., which provides consulting and training services to law firms. Steve and Tim are focused on designing and conducting programs for law firm leaders on leadership and managerial skills, for new partners on building their practices, and for associates on business development and managerial skills, including delegation and feedback.

Steve is an educator and consultant who led talent-management groups at major U.S. firms for 20 years before joining Firm Leader in 2009. Steve also teaches legal writing for judges, government agencies, and firms, and is the co-author of *Thinking Like a Writer: A Lawyer's Guide to Effective Writing and Editing* (3rd edition, 2008, Practising Law Institute).

Tim was a partner with management responsibilities in a leading Canadian law firm and has been a consultant to law firms for 20 years.

How can PD professionals increase the odds that lawyers will follow through with their goals after a training program? This article offers a roadmap of steps to take before, during, and after a program to avoid "one-day wonders."

How can PD professionals increase the odds that lawyers will follow through with their goals after a training program and that, a few weeks or months later, their performance will actually have improved?

Let's say a mid-level associate is committed to delegating more effectively, or a newly promoted partner has created a plan to invest time in business development. They walk out of a program with smiles on their faces and goals in hand, leaving behind evaluations with glowing reviews. The program is a success! But will they follow through, develop new skills, and improve their performance? Or will they slide back into existing habits once they return to the whirlwind of their practices?

Is there an antidote for the "one-day-wonder" training program? It's tempting to assume that what's missing in most cases is follow-up, both to support learners and to hold them accountable. That's often right, of course, but the follow-up won't be effective unless a foundation is laid for it before the training, and the training itself is designed so the participants leave with both the ability and the desire to put what they learned into practice.

This article provides a nine-step roadmap for PD professionals who are responsible for designing and supporting skills-based training that leads to improved performance.[1] Each step matters and, in an ideal world, you would try to take all of them for every skills program. In the real world, that's unlikely and probably impossible. For high-stakes, high-value programs such as a leadership program for practice leaders or a business development program for newer partners, it's worth the effort.

For other, less ambitious programs, perform the cost-benefit analysis: remain ambitious about how many of the steps you can incorporate, but focus on the ones that will matter most.

Skills programs encompass an enormous range of topics, from taking a deposition to leading a firm. As a context for this article, however, we will focus on skills that have proven to be both critical for a firm's success and challenging for lawyers as they become more senior. They include these skills:

- managing the work of others,
- leading projects and teams,
- managing client relationships,
- developing new business, and
- leading groups, such as practice groups, industry teams, or offices.

For these skills, successful training will depend as much on steps taken before the program as steps taken to follow up.

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[1] For an excellent resource for PD professionals, see Roy V.H. Pollock, Andrew McK. Jefferson, and Calhoun W. Wick, *The Six Disciplines of Breakthrough Learning, How to Turn Training and Development into Business Results*, Third Edition, Wiley, 2015.

BEFORE THE PROGRAM

1. IDENTIFY THE RIGHT SKILLS, PEOPLE, AND STRATEGY

To deliver the right training to the right people at the right time and with the right support, asking the right questions is critical. Fuzzy thinking at this initial stage can undermine the stickiness of the training from the start.

To determine the right skills for a training, ask what lawyers should do differently following the program. If they are to improve their performance, in what specific ways should their behaviors change?

Example: Many firms would like to improve collaboration among their partners for generating new business. Some of these programs, however, simply combine a focus on the business case for collaboration with vague exhortations to collaborate more. Afterwards, partners may be able to explain why collaboration is important. But will that lead to actual collaboration? PD professionals might ask, "What specifically does the firm want partners to be doing?" The resulting list might include, for example, networking within the firm to learn about other partners' practices, having conversations with clients to uncover opportunities for multi-disciplinary collaborations, and conducting tricky conversations to deal with potential obstacles to collaboration, such as who will take the lead or how credit will be shared.

To determine the right participants for a training, ask whether potential participants will be able to practice the skills on the job.

A rule of thumb embraced by training professionals for more than 20 years suggests that roughly 70% of learning occurs on the job, primarily through stretch assignments; 20% arises from interactions with supervising lawyers, mentors, or role models; and only 10% results from formal training programs and reading. The moral: training programs should be designed for those who can promptly begin to apply the training on the job.

A program on delegation may be timely for mid-level associates who are beginning to manage the work of others. But what if some mid-levels have no one to whom they can delegate? Should they be invited anyway? How about a junior associate who is not expected to delegate for some time? Will they benefit from "building awareness" about delegation best practices, or is their time better spent on a program about "managing up"—or on billable work?

In some situations, such as a multi-session retreat, it may be difficult to be so selective about the audience, although one option is to run concurrent sessions focusing on different skills. Even in other settings, however, well-intentioned PD professionals often open programs to a broad range of invitees. The potential downside is that participants who see no opportunity to use the skills being taught may dilute the effectiveness of discussions and exercises for those who need the skills most (see Step 4—Design Interaction for Learning).

To determine the right strategy for a training, the key question is whether the learning can be self-directed, or whether the learners will need assistance from others or change within a group if they are to improve their performance.

After a delegation training session, if the participants have opportunities to delegate and are clear about their next steps, they can be self-directed learners. But what if the situation is more complicated?

For example, assume senior associates are being trained to apply project management techniques to complex matters. They are unlikely to make much progress unless the partners with whom they work support and reinforce their efforts, and unless the group has the right infrastructure in place (budget templates, knowledge management resources, etc.). Or assume income partners are being trained to develop business more aggressively and successfully, and a training session gives them all kinds of useful advice. They may still struggle unless senior partners are guiding and supporting them (by making introductions, for example, or sharing key forms of credit), and unless the firm's incentive systems reward the senior partners for that kind of support.

PD professionals quickly learn the dangers of relying too heavily on training alone in situations where bringing about a change in performance will also require changes to systems, policies, or even cultures. Yet the temptation can be strong, because it is easier to create the training than to take the more challenging steps, and there can be political pressures to just get the training done. As far as possible, though, the temptation should be resisted. If training runs up against obstacles no individual skills can overcome, it may be largely wasted and, even worse, it can breed frustration and cynicism among the participants.

In addition to thinking through the strategy for a program, think about whether you can individualize the strategy for participants. Some people may not need much support, if any; others will. If resources for a program allow, consider providing individual mentoring or coaching that allows an eye to be kept on each person's progress and makes available the right kind of support. Business development programs often provide this oversight through external coaches, but it can also be provided by incorporating mentors or PD staff into the follow-up process.

2. LINE UP LEADERS

To increase the odds for successful follow-through for a high-stakes, high-value program, PD professionals might need to line up leaders to play two critical roles.

First, a leader with clout (e.g., managing partner, practice leader) might be required to "sponsor" the program by underscoring the importance of developing the skills and signaling that the time invested is as valuable as billable time. Senior leaders might also provide cover by calling on supervising partners to ensure that participants are free to attend.

What's involved in sponsoring a training? An email from the

leader announcing the program and encouraging attendance is only the start. The sponsor might talk up the training at internal meetings, show up to introduce the session, and pay attention during the follow-up stages. Some associates will be more motivated to attend and follow up energetically if they see that leaders are watching.

Second, and much more ambitiously, if the training strategy requires support from others after the training session, then a larger number of senior lawyers may be needed—for example, to provide opportunities for participants to practice the skills and to provide feedback as they practice (see Step 9—Structure On-the-Job Practice and Feedback). If participants are setting goals during the program—about how to develop their practices, for example—senior lawyers can play a vital role as sounding boards (see Step 8—Schedule Conversations Promptly).

To line up leaders, PD professionals will have to engage them. The following strategies can help:

- Interview leaders about their experiences and approaches to customize the content of the program. If they have contributed to its content, they are more likely to invest in its success.
- Ask leaders to participate in the session as panelists, co-presenters, facilitators of small group discussions, or coaches.
- Ask for time at practice group or office partner meetings to describe the roles partners can play after a training session and why those roles matter.

3. BEGIN BEFORE IT BEGINS

The latest research confirms what common sense has always told us: successful training is a process, not an event. While an event, such as a two-day workshop for senior associates or new partners, might be the centerpiece of a training initiative, PD professionals should set the table with activities that come before and after the workshop.

When a sponsor announces a training program, the announcement ideally will outline expectations—including time commitments—before, during, and after the training session. For initiatives focused on significant transitions, such as progressing from mid-level to senior associate or income partner to equity partner, the overall training program might include, for example, two or more workshops interspaced with pre-reading, short videoconferences, peer group meetings, and conversations with leaders, spread over the course of a year.

Even for less ambitious programs that involve only one training event with the onus on participants to be self-directed learners afterwards, it can be helpful to begin the training before the session begins.

Example: Let's say your firm has an annual retreat for senior associates that focuses on building successful practices. The retreat is a significant expense: a lot of non-billable time, in addition to the cost of travel, hotels, trainers, etc. How can you prepare participants so they will make the most of the retreat? One approach is to convene a 30-minute videoconference or webinar for participants several weeks in advance to outline the program and expectations of participants. The result? Participants will begin to think about the session before it begins: what they want to learn, goals they might be called upon to discuss, and how they will protect the time. They won't walk into the session cold and waste the first morning trying to get their bearings.

Sometimes it's appropriate to ask participants to take time to prepare more deliberately by reading materials in advance or, for example, refreshing their business plans, if they have one. Understandably, many firms are reluctant to add to the time demands on their lawyers, and skeptical about how many will do more than skim materials, if that, or slap together goals at the last minute. If this sounds familiar, consider assigning less onerous preparation, such as completing an online assessment (e.g., the Myers-Briggs Type Indicator) or speaking with a practice leader about the group's business development strategy to prepare for a discussion at the session. (Such a conversation previews what might follow the program: see Step 8—Schedule Conversations Promptly.)

As a final step, consider how to reinforce the learning after the program ends. For example, alumni of a program might be invited to return the following year as panelists, or recruited to serve as coaches or sounding boards for participants afterwards. Training that sticks will begin before the program begins, and end after it ends.

DURING THE PROGRAM

4. PLAY TO STRENGTHS

When we build the content of a skills program, it's tempting—because it's easier—to assume that it will teach an approach that everyone should adopt, with only the usual variations to suit different situations and personalities. However, especially in realms that require complex skills, such as running a practice group, the top performers often take quite different approaches. They have learned how to build on their strengths by developing the skills and habits that work best for them.

For training to stick, a program's content should usually demonstrate more than one approach to mastering a skill. That does not mean presenting one approach and then wrapping it with fuzzy qualifications about adapting it to one's own preferences. It means focusing on the approaches that are common among successful "performers," and then showing how to make each one work.

Two examples:

- Among the best business developers, some get their results primarily by energetic, never-ceasing networking. It comes naturally to them, and they enjoy it. Others build their practices primarily by generating such intense loyalty among their clients and colleagues that, when a client moves to another company or a colleague moves

in-house, work may eventually follow. Still others … but you see the picture.[2] Everyone uses more than one approach, of course, but few succeed without a focus for their efforts that matches their strengths.

- In our research among lawyers who are particularly effective in leading teams, we found that some rely most heavily on their organizational skills, others on their ability to motivate a team to do its best work. Although the most effective leaders are both organized and motivational, most show a particular passion for one of those skill sets (while ensuring, of course, that they are at least adequate in other areas).

If a program is to appeal to an audience that contains the usual range of lawyer personalities and talents, then it should be prepared to demonstrate a range of approaches that play to different strengths.

5. DESIGN INTERACTION FOR LEARNING

The first question most PD professionals ask about any prospective program is "Will it be interactive?" And they are right to do so. But not every interactive exercise or discussion results in learning, even if it generates a lot of apparent energy in the room. An effective interactive segment will have a more specific goal than simply to get people talking.

The most common goals for facilitating learning are to:

- Connect the program's content with what the participants already know.
- Have the participants apply the content.
- Have the participants use the content to assess and decide how to improve their current performance.
- Help the participants internalize the content by discussing it with others.

The following types of interaction can promote these goals:

- **Brainstorming discussions** that connect the program's content with the participants' individual experience. Adults learn best by building upon what's already familiar. An example: near the beginning of a program on delegation, divide participants into groups of four or five to discuss effective and ineffective behaviors of supervising lawyers based on their own experiences.
- **Case studies and scenario discussions** that engage participants in a problem-solving discussion about a relevant situation or challenge. It's only when we try to articulate a point of view or apply a skill or approach that we will know whether we fully understand it. A similar exercise is to have a participant share with a small group a current challenge they are facing, and then ask, "If you were me, what would you do?"
- **Self-assessments** that have the participants apply the program's content to themselves individually. An example is assessing one's current behaviors or routines against a checklist of best practices. The ensuing discussion will often surface ideas that can be incorporated into one's own routines.
- **Role plays** for skills such as providing feedback or coaching serve the same purpose: by using the skills they are learning, participants understand them more fully and begin to internalize them more quickly.
- **Goal setting** that directs participants to capture their take-aways and commit to a small number of next steps. Have them write down their next steps, preferably on a form provided for that purpose. Some may resist, but writing down a commitment solidifies it in a way that merely thinking about it does not. As a final move, "socialize" the learning by having participants discuss with each other their key take-aways or their next steps. Individuals are more likely to act on what they have learned if they see that others are also taking the learning seriously.

These interactions in small groups, triads, and pairs can provide "air time" for everyone to think aloud, which helps the process of absorbing what they are learning and integrating it with what they already know. However, be sure to debrief in the full group as well. Debriefing is critical to the learning because it enables participants to distinguish between effective and ineffective approaches and hear about a range of effective ones. Was everyone's approach to a feedback exercise equally effective? Perhaps, but probably not.

It won't be lost on PD professionals that effective interaction, designed for learning, takes TIME. The most common design flaws for training in law firms relate to time. No matter how good the content, training is unlikely to stick if the program is shortchanged on time, or it attempts to cover too much material in the time available.

6. MAKE IT EASIER TO FOCUS

Lack of time for interaction is not the only problem that can undermine learning. Anything that breaks or exhausts the participants' focus will also do the trick.

It's a familiar truth that although most adults have no trouble concentrating on a good book or movie for an hour, that discipline seldom transfers into an educational program. As all good program designers know, a training session should change its format every 15 or 20 minutes: 15 minutes of lecture is followed by an exercise, a discussion, or a video demonstration; 15 minutes of discussion at breakout tables is followed by a debriefing for the entire group; and so on. The goal is to refocus attention by giving it a new focus—and, of course, to avoid the wandering minds that result from monotony.[3] Two corollaries to this truth are not so

[2] See Tim Leishman, Sustaining Practice Styles.

familiar, however.

First, the changes in format should themselves be varied. Following every lecture segment with the same kind of discussion can be deadly, as can, for example, relying again and again on video clips to demonstrate a skill.

Second, physical movement can be a powerful change in format. In longer programs, get people moving occasionally. For example, ask everyone to get up, find one other person in the room they don't know well, and spend a few minutes discussing their next steps in applying the program's content. Or, if the participants are seated at tables, have them shift tables every hour or two.

Another familiar truth is that we lose focus when we multitask. We cannot pay full attention to a program and our phone screen simultaneously. However, in many firms, it is unrealistic to tell all lawyers they can safely ignore emails from clients or senior lawyers for 90 minutes, or even an hour. Some can; some rationally believe they cannot, even if they receive reassuring messages about taking time off for a training program. If this is your firm's culture, what can you do?

In addition to building in breaks for participants to check their email, you can:

- Still attempt to enforce the "don't look at your phone" discipline, perhaps by having the leader introducing the program announce the rule. But some people may cheat, and others will be distracted by seeing them cheating.
- Accept the reality that people will want to check email on their phones during the program and that, if they can't, they will be distracted by worrying about what they are missing. Our experience is that, if the program is well-designed and engaging, few take undue advantage of this "permission."
- Even if you are permissive about phones, do your best to ban open laptops. They are a distraction not only for the perpetrator, but also for others who can see the screen or hear the typing.

Whatever approach you decide on, announce the ground rules at the program's beginning.

7. MAKE IT PRACTICAL

The longer participants wait to apply what they learn, the less chance they will apply it at all. How can you raise the odds that they will begin to use what they have learned promptly?

Include a substantial helping of simple, easy-to-apply advice. Overall, the skills being taught may well be too complex to be applied quickly or easily. Usually, however, they include some sub-skills or simple techniques that are easy to apply while the rest of the skills develop.

For example, when more business from existing clients doesn't simply fall in your lap, developing it can be a time-consuming process that requires a mix of skills. But one habit is relatively easy to develop: look for openings for brief conversations where you can ask well-informed, intelligent questions about the client's business that go beyond the work you are doing for it. As we have heard repeatedly, that technique can easily be transformed into a habit that eventually opens the door to more business.

The goal: provide a menu of tips that allows each person to walk away with three or four steps that can be taken quickly and easily. These first steps will build momentum for more ambitious ones. On the other hand, if the first steps seem daunting, they may never be taken.

Show how others have applied the advice. Even simple advice such as "segment difficult assignments" remains abstract and lifeless unless we see it in operation. One way to bring it to life is to describe examples of how others have applied it in specific circumstances. It is often that kind of crisp mini-story that persuades someone to give the advice a try.

Provide checklists as take-aways. It's the rare lawyer who will read through a lot of handouts after a program. But many will keep and use checklists, because they are easy to read and they are, for lawyers, a familiar tool. Checklists can address recurring tasks, broader goals, or common challenges. Some examples:

- **Tasks:** delegating an assignment, confirming objectives and scope for a matter with clients, or running a team meeting.

- **Goals:** developing junior lawyers, or building consensus among partners for a course of action.

- **Challenges:** delivering critical feedback, or speaking with clients about alternative fee arrangements.

Ideally, a checklist will fit on one page, or a one-page checklist will serve as a table of contents for a longer, more detailed description of the steps on the list.

AFTER THE PROGRAM

8. SCHEDULE CONVERSATIONS PROMPTLY

If participants commit during a training session to taking specific steps after it, that's a promising foundation. However, as all the pressures of work flood back, the initial commitment may produce nothing more than a nagging sense of failure. If the training is to stick, it should include at least one follow-up conversation, and preferably more. Depending on the program, conversations might be conducted with practice

[3] For information about the scientific basis for this advice, and about the dangers of multi-tasking, see "The Science of Making Learning Stick: An Update to the AGES Model," *NeuroLeadership Journal*, v. 5, August 2014.

leaders, supervising partners, mentors, internal coaches, external coaches, or peers.

Why are follow-up conversations so useful? They bring into play the following learning dynamics:

- When we try to articulate our goals to someone else, they come into sharper focus. And we can surprise ourselves with good ideas that seemingly pop out of nowhere.
- Others often ask great questions, offer useful ideas, or provide a needed reality check. And, if the topic is business development, for example, they might even offer to help.
- When we declare our intention to do something by talking it through in some detail, not simply uttering a few words, we're more likely to take the next step.

The conversation should be an integral part of the training, not an optional add-on. This means announcing it along with the initial session and, ideally, scheduling it during the session. All that is much easier said than done, of course, especially for some types of programs. If the program is a major business development program for partners, even substantial follow-up may not meet resistance. On the other hand, if the program is a segment on managerial skills for mid-level associates that's part of a longer retreat, then scheduling follow-up may be daunting.

These follow-up conversations are so important, however, that it's worth pushing to bring them about. There is a range of options:

Group discussions:

- For major programs—business development for partners, for example, or leadership for group and office heads—the follow-up often consists of three or four group discussions, perhaps a month apart. One option: split the group into subgroups of five or six, and schedule monthly 45- or 60-minute meetings for each group (by video or phone conference if necessary). Although these meetings sometimes provide new content from the instructors, they are intended primarily to talk about the participants' actions and lessons learned to date. Especially among new partners or others who could benefit from collaborating or brainstorming with each other, some participants may continue the conversations under their own steam, either as a group or, more likely, individually.

- For smaller-scale programs, less formal follow-up is more realistic. For example, a shorter program about delegation or project management skills might be followed a month later by a lunch discussion. The participants would be broken into smaller groups for these conversations, which would focus on each person's experience using the skills they committed to developing. Or someone with expertise and credibility could be brought in to answer questions and discuss their approach to the topic.

Individual conversations:

Three types of conversation can be useful:

- For practice-building or career-building programs, a conversation with a practice leader or a formal or informal sponsor or mentor is a good choice. Not only can it produce valuable advice, it sometimes results in offers to help, and, not least, it burnishes the participant's reputation in the other person's eyes: "Here is someone who is taking an active, organized approach to their career." For the last reason in particular, we strongly recommend that larger-scale programs for senior associates and income partners include a follow-up conversation with each person's practice leader or a reasonable equivalent.

  Although it should be up to the participants to make these conversations happen, the practice leaders or mentors should be told that they will happen and educated about their purpose—and the participants should know that the expectation has been created.

- Especially for business development or practice-building programs, an external professional coach can be the best option if the follow-up is to continue for some months. Although external coaches lack the inside knowledge of practice leaders and mentors, they will be more systematic about keeping someone moving forward and can bring to bear a wider range of experience. They also enable participants to admit doubts or failures they might be reluctant to share with those who have some control over their futures.

- During the initial session, participants can be asked to "buddy up" with another participant, and then commit to speaking with each other once a week for, say, the next two months. Will everyone follow through with this commitment? No. But some will, and some of the relationships formed will persist for the long run.

9. STRUCTURE ON-THE-JOB PRACTICE AND FEEDBACK

The best way to master new skills or build new habits is, of course, to practice them and then get feedback from someone who has watched you. This approach is often built into programs that focus on "performance" skills, such as public speaking or examining a witness. But broader, messier skills, such as leading a team or developing business, aren't suited to that kind of practice during a program. And, in any case, it's the sustained practice and feedback in the course of one's work that really matters.

Without the ability to create formal practicums such as law school clinics provide, how can you nevertheless foster practice and feedback after a training session? Here are some options:

Show participants how to become their own coaches. For each participant, this involves two steps:

- First, choose one or two discrete skills or habits

to practice over the next few weeks. That requires breaking larger skills sets, such as managing others, into their component parts, and then selecting one or two small but high-value skills to practice. For example, if senior associates find themselves often surprised when assignments don't turn out as they expected, they might "practice" the habit of segmenting more difficult assignments into stages and discussing at their start when they would like status reports or interim work product.

- Second, commit to taking 15 or 30 minutes at a set time each week for two tasks: looking ahead to when they will have opportunities to practice one of the skills, and looking backwards to "coach" themselves about how they did in the previous week's practice.

Create a real-world equivalent of a practicum. Two examples:

- A practicum can be designed into programs that run for long enough so the participants can tackle a project during them. For example, in one leadership program for existing group leaders and the pipeline of potential leaders, each participant had to select a real initiative—a project that required persuading a group of colleagues to work together towards a common goal—on which to "practice" leadership during the program.

- If the participants are a relatively small group, and especially if they are in the same office or practice area, the PD staff can sometimes work with senior lawyers to create opportunities to apply a program's content. For example, before a project management workshop for mid-level and senior associates in one group, the group's partners agreed to look for opportunities to have associates participate in creating matter budgets, a task that partners in this group typically handled themselves.

Create a feedback loop:

Who provides the feedback, and how mandatory it is, depends on the program and the participants, but the goal is to gather feedback from those who have first-hand knowledge of how a participant is performing. For example, during a managerial-skills program, the participants can be shown how to ask for feedback from those they manage in ways that open the door to informative discussions. Or, during a leadership program for group leaders, the participants can discuss how to ask one or two colleagues to give them ongoing, honest feedback about how their actions are perceived within the group.

For all the obvious reasons, many will be reluctant to collect this feedback, but that's not a reason to avoid making the suggestion and showing participants how to implement it. Sometimes, formal upward or 360-degree review systems may focus on the skills a program develops but, even in those cases, the informal, face-to-face feedback is often more useful because it is more detailed and more prompt.

Although nothing can force lawyers to absorb and apply a program's learning if they do not want to, these steps can dramatically increase the odds that they will emerge from a program ready, able, and willing to take charge of their learning. If you are able to take all or most of them for a major program—not an easy task, we recognize—the results will be gratifying. But even if you can take only two or three for smaller-scale programs, it will be more than worth the effort.

Write for the PDC Blog

The PDC is seeking written submissions from members for its blog! If you are interested in contributing a personal story, a summary of a recent/past training event, news about your firm, or anything relevant to our industry, please contact Kathy Bradley at kbradley@pdclegal.org or visit the PDC Link Blog at http://www.pdclegal.org/blog for further details!

LEARNING TO WORK, OR WORKING TO LEARN? JOB AIDS AS DEVELOPMENT TOOLS

by Ross Guberman

A former practicing 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 the Association for Talent Development.. Ross has spoken at many lawyer development conferences as well.

"Lie down and put your hands behind your back," says Sylvester Stallone. Wesley Snipes mocks him and stands even taller. Stallone moves a hand-held device to his mouth and says, "Maniac gives snarky response." Out of the device comes a robotic monotone: "Approach and repeat ultimatum in an even firmer tone of voice. Add the words 'or else.'" Lo and behold, the device's advice works!

This scene is from the 1993 futuristic spoof Demolition Man. If you've seen the movie, you probably didn't think of the voice on Stallone's device as a job aid or performance support, yet it fits the modern-day definition to a tee: it's intrinsic to Stallone's job task, it provides just-in-time advice and prompting, and it imparts knowledge and expertise that Stallone can use the next time a would-be felon tries to buck him.

As you imagine Stallone listening to a robot that seems to shake its head at his milquetoast request and prompts him to stiffen his spine, what tools does the device conjure up in your own professional life or in those of the lawyers you help?

Even in 1993, of course, job aids were nothing new. Experts trace them to prehistoric cave drawings outlining best practices in hunting and cooking. If you were out in the field hunting for food, however, the images in those cave sketches hardly provided "just in time" support—you would have needed the ability to recall them hours or days after seeing them. In other words, the sketches were much like sitting in a classroom today.

Performance tools have come a long way since then. As technology and learning theory have advanced, so have job aids. Nowadays, such tools are often integrated into the job task itself, and they're inching their way toward the "sweet spot" between vague guidance and excess control.

LAWYER JOB AIDS: THREE STRIPES

In law school, many of us used canned study aids like laminated flash cards and cherished outlines passed on year after year. How about in your practice?

To prepare for this article, I read the current literature and asked lawyers what job aids or other tools they've found most helpful. As the job-aid literature suggests, I'll put the recommendations into three categories: static or procedural aids, coaching aids, and performance aids. I've listed these categories in order of increasing technological or cognitive sophistication, but as we all know, more sophisticated doesn't always mean better.

Static or procedural job aids. Let's start with static job aids. Whether they're handwritten in crayon or stored in the cloud, static job aids organize selected information or tasks. The following static aids all get high marks with lawyers:

- Flow charts (various practices and processes)
- Checklists (such as a closing checklist, affirmative defenses, and contract boilerplate)
- Checkvist (syncs checklists with devices)
- Todoist
- Gantt charts/Trello (project management)
- Internal wiki pages (internal subject-matter experts)

In my world of legal writing, an editing bookmark is a good example of a static checklist, as is my list of issues to consider in drafting a mandatory arbitration clause.

Coaching job aids. In the context of job aids, coaching is not used in the sense of a human coach. It's more about provocative questions that guide your thought process and the creation of your work product.

Following are some job aids that fit into the coaching category because they prompt and provoke more than they instruct:

- OmniOutliner (organizes thoughts, research, and briefs)
- MindMup 2 (same)
- Question-based templates
- Principle-based checklists (deposition goals and behavioral interviewing)
- Supervisor markups of drafts with questions and comments
- Internal Q&A listservs with discussions

An example of a coaching job aid for legal writing would be the template of questions I've designed to help lawyers write client-friendly alerts and blog posts. The template tells you which questions to ponder, but it doesn't provide the answers.

Note that coaching job aids are physically removed from the attorney's work product, temporally removed, or both. That's not necessarily a problem, but it's a factor to consider.

Performance job aids. Performance job aids directly help you do you what you need to do. Think of the GPS device in your car or the Google Maps app on your phone—they give you the right amount of information at the right time, and you don't have to stop working (or driving) to use them.

The guru of performance aids, Gloria Gery, describes them as support systems that provide "on-demand access to integrated information, guidance, advice, assistance, training, and tools to enable high-level job performance with a minimum of support from other people" (Gery 1991).

According to performance-support expert T.B. Cavanaugh, performance aids should be intrinsic to the work product, intuitive, and intelligent. He says they should accept user input, allow customization, and provide information that supplements the user's direct request (Cavanaugh 2004).

It's interesting that the attorneys I surveyed didn't mention any job aids that seem to fit into this category. So I thought of a few tools on my own:

- Nontechnological
- Feedback on rehearsals of public speaking engagements and presentations (with a chance to redo them)
- Mooting an argument or hearing
- Technological
- Spell checkers (Cavanaugh even gives the specific example of Microsoft Word auto-correcting "teh" to "the")

A CASE STUDY: BRIEFCATCH

Attorneys need to worry about so many things when they write: analysis, substance, the right degree of detail, the right degree of confidence, the right number of authorities, supervisor whims, client whims, tone, accuracy, formatting, proofreading, deadlines, and, of course, prose style.

Through formal and informal training and mentoring, attorneys learn tips and strategies at different stages for managing—and eventually excelling at—these divergent tasks and goals. Most savvy attorneys find, however, that having a refined prose style is their greatest challenge, with technical accuracy under time pressure running a close second.

That's where I got the idea for BriefCatch. Many lawyers and judges who have attended my workshops have asked me for suggestions on how to remember and incorporate what they learned. I thank my attendees for encouraging me to try to automate much of the legal-editing process.

I wanted to make sure that any performance aid I developed worked directly in Word, for several reasons: to preserve confidentiality, to allow immediate feedback and interaction, and to provide seamless flow between work tasks and improved performance.

BriefCatch has a menu of features an attorney can select, depending on his or her needs. The core of the tool is a comprehensive editing scan that instantly applies thousands of rules and algorithms and then suggests all sorts of changes and fixes. The scan tackles everything from wordy phrases to ineffective use of case law to repetitive transitions. For most suggested edits, the attorney can choose from several alternatives, which allows a much-appreciated degree of control. Approved changes are made right in the work itself. The aid is thus both intrinsic and "just in time."

Other suggestions are of the coaching type—provocative questions that invite reflection about a sentence or phrase. These questions are paired with messages that add a training component. As for the customization that Cavanaugh considers ideal, BriefCatch allows you to turn off an editing rule altogether.

For lawyers with a competitive streak, BriefCatch also offers five custom global-readability scores. These are purely quantitative (meaning no subjective bias) and allow attorneys to track their long-term skill development. At any stage of drafting, users can also generate a narrative report that shares big-picture observations along with general strengths and weaknesses.

Job aids like BriefCatch are ideal for those who are open to feedback and suggestions. I have found that most attorneys and judges enjoy interacting with the tool, and it helps with non-legal writing as well.

As time demands increase and one-on-one mentoring becomes harder to fit in, attorneys and professional development officials will be clamoring for any tool that can help improve their work product immediately. And it doesn't hurt if the tool also makes work a bit more fun!

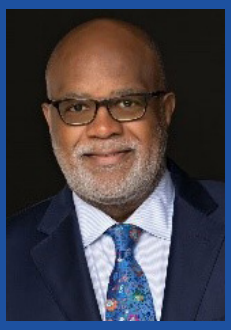
REFERENCES

Cavanaugh, T.B. 2004. "The new spectrum of support: reclassifying human performance technology." Performance Improvement, 43(4): 28–32.

Gery, Gloria J. 1991. Electronic Performance Support Systems: How and Why to Remake the Workplace Through the Strategic Application of Technology. Tolland, Mass.: Gery Associates.

MY EXPERIENCE AS A NEW PDC MEMBER

By Judge Jon R. Gray, Partner, Shook, Hardy & Bacon, LLP



Judge Jon R. Gray is a retired judge in Circuit Court of Jackson County, Missouri, and now serves as a Partner at Shook, Hardy & Bacon, LLP. He is a member of the Panel of Commercial Arbitrators of the American Arbitration Association and serves as a mediator and arbitrator for parties to commercial, employment, and business disputes. As a citizen of the firm, Judge Gray chairs the Professional Development Committee that is responsible for planning and executing all of the firm's continuing legal education programs.

The 2018 Summer Conference in Portland was my first PDC experience. Earlier in the year, I was asked to be the firm's representative after our previous representative decided to step back from several of his involvements. The hand-off was timely because it allowed me (just barely!) to register for the Summer Conference. The PDC staff members helped me get signed up as a member and as a conference registrant. They even leaned on the hotel management to get me a room after the deadline. Hats off and thanks to the PDC staff once again.

Professional organizations can unintentionally be daunting to new members. We often tend to gravitate toward old acquaintances and cluster with the familiar rather than enlarging the circle to include new people. My experience at the PDC was not like that at all, but was one where I immediately felt welcomed, included, and valued from my first interaction. The PDC Conference and my new colleagues were an expression of what we do in the professional development world: find and support the best in everyone and make experiences available that will take individuals to the proverbial next level in their skills development.

I come to the world of professional development after a career that can best be described as a succession of stages. I started my legal career in government and transitioned to a solo private civil practice. I made a failed attempt at a local elective office and learned the valuable lesson that even when you lose, you can still win if you can recognize the next door when it opens. The most fulfilling part of my practice was when I formed a partnership with two of my friends to create and manage our own firm.

Around the ten-year mark in my career, I had the opportunity to go on the bench and I spent the next twenty years as a general jurisdiction trial judge on the Circuit Court of Jackson County, Missouri, where I presided over civil and criminal jury trials—and gathered lots of material for when I finally get around to writing my memoirs. I also spent numerous volunteer hours as a faculty member of the National Institute for Trial Advocacy, of the Missouri Judicial College, and for educational programs for new state judges. I presented and moderated continuing legal education (CLE) programs for the Missouri Bar and the Kansas City Metropolitan Bar Association.

Just as I began to wonder what was next in my career, I was invited to join the international law firm Shook, Hardy & Bacon, LLP as a partner in its Kansas City office. It was not long before I was asked to chair the firm's Professional Development Committee, which designs and presents a full array of CLE curricula for our attorneys and offers CLE to our clients' legal departments.

Another significant portion of my time is devoted to serving as a mediator and arbitrator for parties engaged in civil disputes. Occasionally, one of my partners will ask me to help with a case that is in litigation. I have been with Shook for eleven years and I enjoy working in an intellectually stimulating legal environment with some of the top litigators in the profession. I take special joy in the opportunities I have, to work directly with our younger lawyers on trial skills development, legal writing, and the art of lawyering.

I deeply appreciate the spirit of collegiality that I felt at the Summer Conference and the periodic reminders of that spirit of cooperation whenever a message comes into my inbox through the PDC Listserv. I look forward to continuing my involvement with the PDC and I'm ready to go to work to support the goals and objectives of our organization.

2018 SUMMER CONFERENCE IN PHOTOS

Simon Colley, Founder, TRUSTlabs; Opening Plenary Speaker

Don Smith, PDC Chair and Elizabeth Foster-Nolan, Summer Conference Planning Committee Chair

Left to Right

Miriam Wen-Lebron, Senior Professional Development Coordinator, Fenwick & West LLP; Kiko Korn, Owner, Legal Writing Works; Taylor Nolan, Professional Development Coordinator Fenwick & West LLP; Jeanne Picht, Professional Development Manager, Thompson Hine LLP and Kathleen Dunn, Director of Attorney Development, Katten Muchin Rosenman LLP

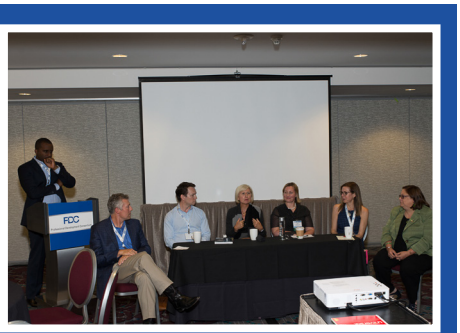
Presenter, Dan Shadwell, Director of On-Camera Training, GK Training & Communications

Presenters, Kristen Uhl Hulse, Assistant Professor of the Practice of Law, University of Denver Sturm College of Law and Doug MacKay, Director, Exec | Comm, LLC

Presenter, Kelly Brown, Principal Advisor, BSD Strategy Group, Inc.

Presenter, Kathleen Dunn, Director of Attorney Development, Katten Muchin Rosenman LLP

Meet the Trusted Advisors Panel



Campfire Chats

PDC Board of Directors

MEET OUR TRUSTED ADVISORS

Ida Abbott: Ida Abbott Consulting

Anne Brafford: Aspire

Michael Chad Hoeppner: GK Training & Communications

Jackie Cranford: Cranford Advisory Services LLC

Paula Davis-Laack: Davis Laack Stress & Resilience Institute

David Freeman: Law Firm CultureShift®

Steve Gluckman: LawFirmElearning, LLC

Ross Guberman: Legal Writing Pro LLC

Brian Johnson: Johnson & Hunter, Inc.

Kiko Korn: Legal Writing Works

Marty Latz: Latz Negotiation Institute (LNI), Inc.

Audrey Lee: Perspectiva LLC

Tim Leishman: Firm Leader, Inc

Tammy Patterson: NALP Foundation

Molly Peckman: Molly Peckman Training & Development

Larry Richard: LawyerBrain LLC

Joanne Schaefer: JSchaefer Coaching & Consulting

Scott Westfahl: Harvard Law School

NEW TRUSTED ADVISOR INITIATIVES

The PDC TA Road Show is a new program offered by our Trusted Advisors. This program will entail TAs individually traveling to PDC Local Group meetings to provide content that interests you. Visit the TA page on the PDC website to learn more about the new opportunity available to PDC Local Groups.

PDC MEMBER DISCOUNTS

On behalf of our PDC Trusted Advisors, we are pleased to begin offering member discounts for our members. Check back regularly for updates.

PDC MEMBERSHIP MEETING MINUTES

Friday, July 20, 2018 • 8:15 a.m. – 9:30 p.m. ET • Portland, Oregon

WELCOME AND CALL TO ORDER

Don Smith – Call to order: 8:38 a.m.

Congratulations to the following PDC members who won raffle items during the Membership Meeting!

- $50 AMEX Gift Card – **Jon Gray**
- $100 AMEX Gift Card – **Larry Brown**
- Series 3 Apple Watch – **Denise Jaffe**

2017/2018 YEAR IN REVIEW

Don Smith highlighted some key accomplishments of the PDC in the past year:

- Hosted a successful Winter Meeting in Washington D.C. with 116 people in attendance
- Provided nine educational webinars in partnership with Trusted Advisors and PDC members
- Launched a successful Member Needs Assessment at the end of 2017, which has allowed the PDC board to take your feedback and make immediate changes to better suit the needs of our members.
- Added seven new Trusted Advisors to the program and renewed the current Trusted Advisors for a total of 18 Trusted Advisors
- Planned the Summer Conference in Portland, Oregon (thank you to Elizabeth Foster-Nolan and the planning committee!)

RECOGNITION OF PDC BOARD OF DIRECTORS

Don Smith recognized the current PDC Board of Directors and provided a special recognition to Maggie Suender and Liz Tingey who are rolling off the board.

INTRODUCTION OF THE 2018–2019 BOARD OF DIRECTORS

Amy Hancock recognized each of the 2018–2019 board members:

- Deborah Atlas, Indiana University Maurer School of Law
- Lori Broderick, Eversheds Sutherland (US) LLP
- Milana Hogan, Sullivan & Cromwell LLP
- Shuhana Khan, Jenner & Block LLP
- Jeanne Picht, Thompson Hine LLP
- Deepa Selvam, Morgan, Lewis & Bockius LLP
- Don Smith, Fried Frank Harris Shriver & Jacobson LLP
- Johnna Story, Finnegan Henderson Farabow Garrett & Dunner LLP
- Erin Walczewski, Cooley LLP; and
- Jane Williamson, Ropes & Gray LLP

MEMBERSHIP UPDATE

Lori Broderick provided an update of the current PDC membership.

- The 2018 retention rate was 95%, which is above the industry standard.
- We ended 2017/2018 with over 600 members. Members continue to join each month, so the current membership total is about 653.
- Lori thanked the Membership Committee members for their efforts in reviewing applications, welcoming new members, and assisting with membership renewals. The current members of the committee are:
  - Debbie Atlas
  - Johnna Story
  - Ori Portnoy
  - Danielle Rosetti
- Membership category breakdown:
  - Alliance: 5
  - Alumni: 12
  - Government: 8
  - Law School: 17
  - Supporting: 31
  - Law Firm & In House: 580
- Applications since July 2018:
  - Reviewed – 161
  - Accepted – 146
  - Declined – 15 (Vendors, consultants, bar associations, law firm partners, etc.)
  - 94% acceptance rate

LOCAL LEADERS GROUP UPDATE

Johnna Story provided the update regarding the local leaders. Johnna invited the local group leaders to stand to be recognized by the members and thanked them for their work this year. The Local Group Leaders held quarterly calls in 2017/2018. Johnna reported that they established a system of welcoming new PDC members and inviting them to attend local groups. Johnna also stated there are many opportunities to get involved at the local level and encouraged members to contact their local group leader if they are interested in participating at the local level.

FINANCIAL REPORT

Jane Williamson provided the financial report for the PDC. The fiscal year ended December 31, 2017 with excess of $35,173 in revenue over expenses. Current assets are at $570,000. Jane provided the PDC's revenue breakdown by percentages: Summer Meeting 49%; Membership 37%; Winter Meeting 10%; Publications 4%.

PDC MEMBERSHIP MEETING MINUTES *(cont'd)*

Friday, July 20, 2018 • 8:15 a.m. – 9:30 p.m. ET • Portland, Oregon

Jane said the goal moving forward is to begin investing this money to protect the health and longevity of the association. We began investing the reserves, but also putting money back into membership in order to create more opportunities for member engagement.

2018-2019 PRIORITIES

Don Smith presented the 2018 – 2019 priorities. The top priorities are to enhance and improve the PDC community by expanding value through content access (listserv, conference, and newsletter); Moving functionality to **Higher Logic** to better serve our needs and creating more volunteer and leadership opportunities, while increasing our partnership with the Trusted Advisors.

Don Smith shared that PDC members have indicated their strong desire to have the PDC invest in better online tools to help them with their jobs and to build relationships and communities easily within the PDC. We are doing that by implementing **Higher Logic** and it will help us achieve the following goals:

- Improving the member directory format and functionality
- Adding new online communities
- Providing easier on-demand viewing of recorded webinars and conference sessions
- Adding new tools such as member-specific calendars that display all their PDC activities
- Replacing the confusing and seldom-used MemberFuse section of the site, and will provide better integration with the rest of the website
- Increased idea-sharing among members
- Expanded relationships among members
- Improved members' efficiency
- Improved PD staff efficiency

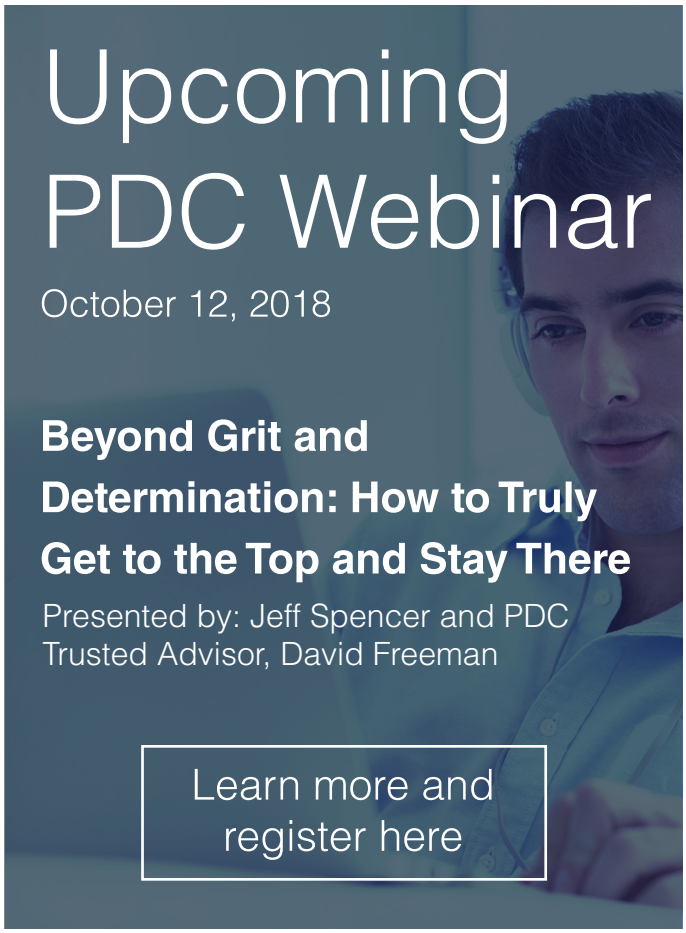
Overall, the new **Higher Logic** community platform will help us increase the engagement level of members, retain members, attract more new members, and boost the already existing loyalty of all members.

2018/2019 CALENDAR

- **2018 Winter Meeting** – Wednesday, November 28, 2018 at the Mandarin Oriental Hotel in Washington, D.C. Kristin Heryford, Manager of Professional Development at Cooley LLP will serve as the Chair of the Winter Meeting Planning Committee.
- **2019 Summer Conference** – July 11–13, 2019 at the Westin Nashville in Nashville, Tennessee. Michele Bendekovic, Director of Diversity and Inclusion at Bass, Berry & Sims PLC will serve at next year's Summer Conference Chair. Call went out to look for volunteers to assist in planning the event.

ADJOURNMENT

Don Smith adjourned meeting at 9:22 a.m.



PDC
Professional Development Consortium
Save the Date:
2019 PDC Summer Conference
July 11–13, 2019
The Westin Nashville
Nashville, Tennessee