Professional Development Consortium

Linkletter

THE OFFICIAL PUBLICATION OF THE PROFESSIONAL DEVELOPMENT CONSORTIUM

PDC

Fall 2015, Vol. 3, Issue 2

CHAIR'S NOTE

by Amy Hancock

Hey, y'all! I'm so honored to lead our incredible group, and I know as a team, we are going to accomplish many great things together. You can read more about some of the excellent things we have already accomplished as well as some of the exciting things we are looking forward to this year on page two of this issue, in my first Chair's note! But first, for those of you I have not had the opportunity to meet, here's a little bit I'd like you to know about myself and my experience in the industry: I've been in the field just shy of 20 years (I graduated from The University of Texas School of Law in 1997) and a member of the PDC for 14 years. I specialize in directing and implementing the strategic training and development initiatives for the attorneys at my firm. I have 1 daughter, Amelia, who will turn two years old in October, 2 Blenheim-colored (that's burnt orange and white - to match the Texas Longhorns, of course!) Cavalier King Charles Spaniels. I'm looking forward to the continued development and deepening of so many valuable friendships I have made being an active member and leader of our fantastic organization! *(Continued on Page 2)*

Inside: PDC Linkletter

A publication of the Professional Development Consortium (PDC).

MANAGING EDITOR
Marni Becker-Avin, Becker & Poliakoff

Address article submissions to newsletter@pdclegal.org

CHAIR'S NOTE

(Continued from Page 1)

by Amy Hancock

Many of us are wary (at least *initially*) of new things. It's a known fact that change makes some people uncomfortable. One could say our jobs [even] exist to support a populous of professionals prone to cynicism and hugely skeptical of changing landscapes and circumstances!

Given that backdrop, I understand that along with change can come some amount of discomfort. But what do they always say? - that it's from change and the challenges it brings, that the greatest amount of growth and renewal can result?!?

Change IS on the horizon as a new day dawns with changing leadership at our helm, but here is one of the many silver linings that comes right along with it: the incredible things Past Chair Jim Lovelace and his former boards accomplished during their tenures serving our organization. As I recently shared during our summer conference's annual meeting, those generous colleagues left us with an incredibly solid legacy and foundation upon which to continue growing and thriving. As our leadership guard does indeed change, we couldn't be more thankful to those who have gone on before. And how does that one line in the catchy Semisonic song, "Closing Time" go? "Every *new* beginning comes from some *other* beginning's end"?

I'm excited to share ideas for *new* beginnings and reflect on what we celebrated during our incredibly successful recent conference in glorious San Francisco:

- *Newly* charged batteries - to take on all that is to come and a *renewed* sense of invigoration in which to tackle challenges that lie ahead (both for our organization and in our own careers).
- *New* programming elements at the Summer conference ("First-timers" meeting, Speed-dating/Networking opener, the phenomenal PDC talks and the very first PDC Development Fair!)
- *New* (and bright and shiny!) PDC website (please visit www.pdclegal.org and "like" us on Facebook, as well!)
- *New* Trusted Advisors
- *New* leadership/board members
- *New* members, who will be our next crop of new volunteers who will help us meet the . . . . . .

New challenges that lie ahead: how will we continue to grow our membership and revenue streams while maintaining our unique culture of close collegiality? How best do we invest our growing revenue streams to ensure the most solid financial base for the continued future of the organization? Do we need to do a marketing assessment of sorts to determine if we need a *new* brand or logo to go along with our robust *new* website? Do we need to review our corporate governance policies and procedures and make some *new* changes to our current bylaws? What *new* publication opportunities and *new* ways to continue utilizing all the collective work of great resources like the PD competencies and the *new* LinkLetter can we introduce in the coming years? What *new* ways to share our forward-thinking and innovative knowledge and industry expertise with *new* audiences (like law school deans, corporate general counsels and law firm managing partners) can we implement, going-forward?

So while some of us may be initially uneasy with *new* changes on our horizon, I want you to know that I am not - because I know we can tackle whatever challenges such change brings our way together. The collective wisdom and passion of this group is immeasurable (and hence: unconquerable!) so I say; "bring on all the *new* stuff that awaits us: we got this, y'all!"

We thank our PDC Board of Directors for their hard work and dedication! Pictured here are our incoming and outgoing board members for the 2014-2015 and 2015-2016 year. Back Row (Left to Right): Lori Broderick, Liz Tingey, Debbie Atlas, Anthony Grumbach; Front Row: Larry Brown, Gillian Murray, Amy Hancock, Jim Lovelace, Jane Williamson, Don Smith, Ruth Alexandor; Not Pictured: Marni Becker-Avin, Peter Glowacki, Milana Hogan.

GET TO KNOW YOUR TRUSTED ADVISORS:

We asked our Trusted Advisors a series of interview questions related to Professional Development. Continue reading for a look at current industry trends and helpful advice.

Jacqueline Wilson Cranford is the founder and principal of Cranford Advisory Services LLC. She also serves as a Senior Consultant with Verna Myers Consulting Group LLC. With over 25 years of legal industry experience and a demonstrated record of successfully designing and implementing talent management strategies, Jacqueline serves as a trusted adviser to leaders in the legal industry and an advocate for effective talent management. Prior to establishing Cranford Advisory Services LLC, Jacqueline led talent management initiatives for more than 14 years in three American Lawyer 100 law firms. She developed and implemented global talent management strategies relating to diversity, inclusion, recruiting, professional development, performance management, leadership training, business development, and global integration, among other things. Additionally, she served as an adviser to firm leaders, partners, associates, and administrators while also representing the firms externally, developing a wide range of meaningful relationships in the legal community. Jacqueline has been actively engaged, frequently as a speaker, with organizations such as the Minority Corporate Counsel Association, Corporate Counsel Women of Color, the Leadership Counsel on Legal Diversity, NALP, and the PDC. She also has held leadership positions with NALP and the Association of Law Firm Diversity Professionals, of which she was a founding member. Jacqueline graduated from Oral Roberts University, cum laude, and earned her law degree from the University of Virginia School of Law. Following law school, she joined Kirkpatrick & Lockhart LLP (now K&L Gates LLP) as a litigator and remained there for five years before joining the U.S. Department of Justice as a trial attorney.

For a complete biography of Jacqueline Cranford, click here to visit her page on the PDC website.

"During my tenure as a law firm director, I benefited from PDC membership and always appreciated the valuable resources available through the PDC community," says Jackie Cranford, Principal of Cranford Advisory Services LLC. "Now that I am no longer working in a law firm, I am thrilled to reengage in the PDC community as a Trusted Advisor. Serving as a Trusted Advisor affords me the opportunity to share my experiences and observations while learning from members of this amazing community of professionals, committed to excellence in legal service."

Jackie's advisory services in the area of talent management stem from deep roots in the legal industry. With 20 years of law firm experience, during 14 of which Jackie focused on developing and implementing talent management strategies, Jackie has a great deal of experience in the legal world. "Having walked in the shoes of a recruiting, professional development, and diversity and inclusion director at three Am Law 100 firms, I have insights into the day-to-day operations, challenges, and joys of managing these responsibilities. And, having served on recruiting and professional development committees as an associate, I understand the struggles that some attorneys face working to making their firms more diverse, inclusive, and effective at recruiting and developing great lawyers. These experiences not only enable me to understand the challenges that lawyers and administrators confront, but also equip me to advise them on how to succeed as change agents in their respective roles."

"...it is encouraging to witness more leaders recognizing that investments in diversity and inclusion enhance their broader talent management strategies..."

Her tenure in the world of legal PD and talent management also provides her with insight into the changes occurring in the industry. "While some have recognized this for years, more law firm leaders are recognizing and acknowledging the intersections between professional development and diversity and inclusion. Professional development has gained stature in many law firms, as demonstrated by the funding and support of professional development programs." Though professional development has made gains in the legal environment, Jackie finds that diversity and inclusion tend to fall behind. Jackie says, "diversity and inclusion has been a hot topic for several years, yet, the willingness to provide sufficient support and take innovative steps to advance diversity and inclusion lags behind (with some exceptions). I attribute this partly to a greater ability to see a clear connection between developing skilled lawyers and providing excellent client service." According to Jackie, this lag in the development of diversity and inclusion carries implications for attorneys of color. "Starting with the premise that professional development is key to a lawyer's success, it is particularly critical for attorneys of color to have meaningful professional development opportunities. Not only are attorneys of color underrepresented in law firms, but they often must overcome negative presumptions (based on both implicit and explicit biases) in addition to learning how to be great lawyers." However, she finds that "it is

Thank you to our 2015-2016 Trusted Advisors!

Ida Abbott,
Ida Abbott Consulting

Steve Armstrong,
Firm Leader, Inc.

Jackie Cranford,
Cranford Advisory Services LLC

Steve Gluckman,
LawFirmElearning

Ross Guberman,
Legal Writing Pro

Tracy LaLonde,
Akina

Tim Leishman,
Firm Leader, Inc.

Terri Mottershead,
Mottershead Consulting

Tammy Patterson,
NALP Foundation for Law Career Research and Education

Larry Richard,
LawyerBrain LLC

Scott Westfahl,
Harvard Law School Executive Education

To learn more about all of our Trusted Advisors, visit our Trusted Advisor Page on the new PDC website!

encouraging to witness more leaders recognizing that investments in diversity and inclusion enhance their broader talent management strategies, and investments in both talent management and diversity promote excellent client service. As the saying often attributed to John F. Kennedy goes, '[t]he rising tide floats all boats.'"

"With more firms identifying the nexus between professional development and diversity, PD professionals who have not already focused on enhancing their competence in the diversity and inclusion arena face challenges staying ahead of the curve." Jackie believes that some additional challenges facing PD professionals include "being a change agent in the face of resistance to change; speaking truth to power while maintaining a strong reputation as a knowledgeable, committed, and effective professional; and demonstrating strong business acumen in an evolving legal environment."

In order to best rise above these challenges and excel in the field, Jackie suggests that PD professionals make the most of their relationships with other members of the industry. "Develop strong relationships!" she says, "over the years, I have gained so much from developing relationships with more seasoned professionals who were willing to share a cup of coffee and words of wisdom. Likewise, I have gladly invested countless hours in newer professionals, sharing insights and helping them navigate new waters. The give and take of such relationships is key – make sure to think about what you have to offer to others, including those more senior than you, who take the time to invest in you. Brace yourself for a long journey. Set realistic goals, communicate them often, and celebrate the small victories along the way to your ultimate goals."

In regards to her own work, Jackie finds that, "diversity and inclusion initiatives often are set apart from other talent management efforts. I have had the privilege of overseeing professional development and inclusion initiatives simultaneously, and experiencing how combined oversight facilitates coordination and benefits both areas. Recognizing the intersections is an important step. At the same time, to increase the likelihood of success and lasting change, it is imperative that firms provide sufficient resources – financial and human resources – to both areas and not deprive one or the other when combining efforts."

Jackie finds that the importance of her work in diversity and inclusion expands beyond the legal industry. "In the diversity space, it is exciting to see so much public engagement around current events. While we have experienced many high profile, sad, and tragic events of late, highlighting issues concerning race relations in the U.S., I am encouraged by the much-needed awareness-raising about current realities and willingness to engage in dialogues on these issues. I will be ecstatic when we start seeing more open and honest dialogues, across difference, in which people hear opposing view points and differing experiences with open ears and a willingness to acknowledge the realities, perspectives, and experiences of others…I recently read Anita Shreve's Testimony, a story about a moment of bad decisions that derailed the lives of several students, their parents, a school administrator, and others, in a private New England school. This tragic story made me think about the diversity of experiences of our youth and compelled me to think about different ways to impact the lives of our future leaders and equip them in advance to make wise decisions in those key moments of life."

Currently, Jackie is working on a leadership development program for student leaders of law school affinity groups. Jackie states, "I see this as an excellent opportunity to enhance the leadership and management skills of future lawyers as they gain on-the-job training in their current leadership roles. After several years of practicing law and managing law firms, I had an opportunity to participate in a leadership program at Northwestern University's Kellogg School of Management and that exposure to core leadership concepts was pivotal in my management career. I certainly would have loved the opportunity to participate in that type of program much earlier in my career. And to do so during my law school days, when I was learning to lead affinity groups, would have been invaluable. I am excited to engage with emerging leaders about their roles, responsibilities, and opportunities, particular at this time during which issues of diversity, race, sexual orientation, and so forth are receiving so much press."

To read more about Jackie's work, follow this link to view an article written by Jackie on diversity: http://www.talentthinktank.com/one-of-these-things-is-not-like-the-other/

Steve Gluckman brings more than a decade's worth of legal online learning expertise to his role as Founder and Managing Partner of LawFirmElearning. In 2011, Steve was appointed by Harvard University to serve as Senior Fellow at Harvard's Center for Business and Government – where he focused on the intersection of social tools and organization knowledge sharing. Steve is a 2015 Catalyst #DisruptTheDefault award winner and is the author of E-Learning for Law Firms, an Amazon.com best-selling book published by the American Bar Association. Steve previously served as President and Chief Knowledge Officer with ASI, a professional services firm of 350 employees recognized as one of America's "Most Admired Knowledge Enterprises" and as Senior Director of Professional and Organizational Development at Manatt, Phelps & Phillips, LLP. He was appointed Special Advisor to the CEO of the Democratic National Convention Committee in 2004 and authored an IBM-sponsored case study developed for Harvard University's "Leadership for a Networked World" program. Steve received his Master of Public Administration degree from Harvard University's John F. Kennedy School of Government and a B.S. in Computer Science and Information Science from the Watson School of Engineering in New York.

To learn more about Steve, click here to visit his full biography on PDC's website.

"In my work, I am fortunate enough to interact with many PDC members on a day-to-day basis." Says Steve Gluckman, "I value the people in this organization a great deal (I have known and worked with some members for over a decade now) and consider many to be friends in addition to clients and colleagues. PDC members have not just helped me to be better at what I do, but have helped to shape my company and its offerings." Steve is the Founder and CEO of LawFirmElearning, LLC, as well as one of the PDC's newest Trusted Advisors. "When offered the opportunity to give back to the PDC and its members as a Trusted Advisor, I jumped at the chance. I stand ready to do whatever I can to help individuals or the organization as a whole."

"Bite-size content is short and focused, and thus easier to absorb and understand..."

LawFirmELearning has clients from firms across the US, Canada and Europe in addition to several law schools and state bar associations. To describe LawFirmElearning, Steve says, "I think most PDCers have a good feel now for what we do. In a nutshell, we take content in pretty much any format (video, powerpoint, articles, policies, etc.) and use those to create engaging, on-demand learning and communication resources (for CLE and non-CLE purposes)." This experience with e-learning allows Steve perspective into the developing trends around training methods in the law firm and law school environments. "In my book, one of the biggest trends in PD overall is the move away from 'talking head' training, in the classroom or online, and towards more just-in-time, bite-size learning resources. Smart firms are finding that 'bite-size is the right size' for delivering useful online content to their lawyers." This short style content allows lawyers to make better use of training materials as a part of their day to day work. According to Steve, "Bite-size content is short and focused, and thus easier to absorb and understand, and easier to make time for. It is also better aligned with the way our short-term memories work and is likely to result in better retention." Steve sees that a large shift in training styles is currently taking place as law firms and law schools move towards this approach to online training content.

With a trend of bite size content taking the place of more traditional training methods, Steve provides three main points which legal PD professionals should know about e-learning:

1. "E-Learning isn't just a nice-to-have to address the occasional CLE program anymore, but a critical component of any true PD program. And I'm not just saying that because it's what I do every day. To be perfectly frank (and perhaps a bit too blunt), if e-learning isn't a significant part of your PD toolbox, you're missing out and falling behind."

2. "E-Learning means different things to different people and your impressions are only as good as the last experience you had. If you think of e-learning simply as a video tape within a browser, than you're missing out on all that is available to you. E-Learning should be interactive and augment the learning experience. And while it will never replace live, classroom learning (nor should it), it can be an extremely valuable and effective on-the-job learning and knowledge sharing resource."

3. "E-Learning doesn't have to be difficult or expensive to put in place. Leverage what you already have and are already doing. People often think they need to go through a whole new instructional design process or get their partners into video studios or other such activities in order to get a quality e-learning program in place. The fact is, that we've worked with as a little as an existing 3-page word document to create an interactive, engaging e-learning module. Once you get into it, you'll see that this doesn't have to be a big undertaking and can offer significant dividends."

Law firms and law schools have been updating their methods of e-learning very quickly, a fact that Steve has found surprising. "Things seem to be changing at a faster pace today than they were when I was working inside a law firm. And it's not just due to 'millennials'. Our firms are exposed to many internal and external pressures and that is impacting talent management as well. It means we have to think differently and not just stick with the status quo. That can be especially challenging for PD groups that are increasingly being tasked to not only do more with less, but to do things 'better' with less."

Often, Steve indicates that the most interesting work LawFirmElearning is currently working on has come directly from its clients. "The creativity that we see as firms start to realize the capabilities and functionality available to them in this medium is really something." Steve provides the following examples of firm's creative ideas for e-learning modules: "We're building in a lot of 'scenarios' within our client e-learning modules these days. That is, a user is given a specific real-life example (for instance we just created one about a specific Inadvertent Disclosure scenario) and the user is then asked to react and indicate how they would respond. Based on their answer, the e-learning course will then traverse different paths. These are a lot of fun to interact with and really off the learner an opportunity to try things out in a safe environment."

Law firm professionals can bring significant creative solutions to the table. Steve recommends that professionals new to the field of legal PD not be afraid to bring the good ideas they have learned in other fields with them to their new role. "We need to keep pushing the envelope," he says. He also recommends that members take full advantage of the PDC and all it has to offer. "When I first took on my role leading PD for an Am Law 200 firm many years ago, I reached out to other PDC members located in the Washington, DC area - some of whom I had never met before. I invited a handful to our office for a lunch one day so I could pick their brains and get some advice. Every single person I invited showed up. And these were busy PD Directors at the time like Steve Armstrong, Gaye Mara, Chris White and others. It was a very helpful session and I'm grateful to this day for their time." PDC members are always willing to share ideas and advice to help their fellow members. Steve looks forward to collaborating with PDC members again in the role of a Trusted Advisor.

Interested in hearing more from Steve on modern learning? Click here to view his article, The "Modern" Lawyer Learner – Overwhelmed, Distracted & Impatient.

Tammy Patterson is the CEO and President of the NALP Foundation for Law Career Research and Education, a 501(c)3 non-profit organization dedicated to research and education on lawyer careers and the law as a profession. Tammy directs and oversees all aspects of the work of the NALP Foundation, from its research initiatives to its publications, programs, and fundraising. Tammy represents the Foundation's interests in a host of industry venues sharing the latest information on lawyer careers. Before joining the Foundation in 2008, Tammy was the Director of Recruiting and Professional Development at Gardere Wynne Sewell LLP in Dallas, Texas for over 13 years. She served as a member of the Board of Directors of NALP, the NALP Foundation's parent organization, and the national Professional Development Consortium.

To learn more about Tammy, click here to visit her full biography on PDC's website.

"When I was asked to serve as a Trusted Advisor to the PDC, it was a no brainer for me," says Tammy Patterson, President and CEO of the NALP Foundation for Career Research and Education, "I look forward to continuing the friendships and relationships I have come to cherish over the years, as well as continuing to share and exchange research data and trend information collected by the NALP Foundation." Tammy was a member of the PDC for seven years prior to joining the NALP Foundation, and has a rich history with the PDC. During her time as a member she co-founded the Texas PD Local Group and served as a co-chair at the San Antonio Conference. She remembers benefitting particularly from PDC resources and idea sharing tools such as the PDC-LINK Listserv.

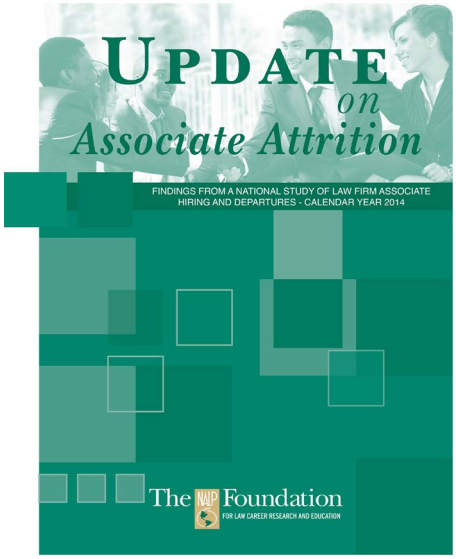
Tammy's role as the President and CEO of the NALP Foundation position her very well to serve as a Trusted Advisor to PDC members. In Tammy's words, the NALP Foundation is, "a nonprofit organization dedicated to the study of effective management of lawyers, their professional development and career satisfaction; and diversity within the profession." In addition to conducting research, the NALP Foundation provides educational programming on topics of importance to the legal industry. According to Tammy, "the NALP Foundation has been providing timely benchmarking research, publications, and the professional exchange of trend and best practices information for 20 years." The NALP Foundation has completed over 50 research studies on the industry, engaged in 12 collaborative projects with legal industry organizations, foundations and associations, and has provided hundreds of educational programs and presentations at national speaking engagements. Having achieved these milestones, the NALP Foundation has become "a preeminent authority on lawyer careers."

"In recent years, we have seen more law school professionals become interested in professional development and have, subsequently, become more involved in organizations such as the PDC." Tammy says, "I think this is an important development and one that we should embrace and encourage. Collaboration between law schools and legal employers will benefit the profession tremendously." In an environment which is currently dealing with a lack of resources, partnering and collaboration, according to Tammy, have the added benefit of offsetting costs. By collaborating with others inside and outside of their firms, legal PD professionals may benefit from knowledge and resources beyond the budgetary and manpower-related limitations of their own firms, limitations that many professionals in legal PD currently face. Tammy sees collaboration not only as a positive for law schools and law firms facing budgetary limitations, but also as a great benefit of the PDC itself, where professionals meet to collaborate on the latest industry trends and challenges.

Tammy finds that the NALP Foundation is currently working on several projects which members of the PDC will find relevant and useful to their work. "In addition to our annual study of law firm associate hiring and attrition, we are currently working on three exciting projects. In June of 2015 we launched our second Study of Law School Alumni Employment and Satisfaction for the Class of 2011. This national research is being conducted in collaboration with our sister organization, NALP. The study measures employment status and career satisfaction three year after graduation, exploring an array of satisfaction dimensions in order to help gain a better understanding and insight into how the law school experience prepared law students for post-graduation employment. The

"In recent years, we have seen more law school professionals become interested in professional development and have, subsequently, become more involved in organizations such as the PDC."

findings of this study also include information regarding law school courses, jobs graduates have applied for, and an exploration into large law firm careers. We are also working on the launch of an international study of conflicts of interest. As a direct result of the NALP Foundation's Law Leaders Summit in 2013, a task force was formed to examine the issues and challenges of conflicts from both the in-house and law firm perspectives. The goal for this project is to conduct research around this topic and provide



results and recommendations through a written report and facilitated round-table discussion. Finally, the NALP Foundation is working on logistics for second Law Leaders Summit, where leaders throughout the industry will gather to discuss current trends, best practices, and solution-oriented approaches for navigating the rapidly changing legal landscape. The event will be held at SMU Dedman School of Law in Dallas, Texas on October 29, 2015. This intimate, invitation-only event will include law firm leaders in the areas of management, hiring and professional development, law school deans and career services administrators, general counsel from corporate legal departments throughout the US."

Tammy encourages PDC members to take advantage of every learning and networking opportunity made available to them. Tammy remembers benefitting greatly from the learning opportunities the PDC afforded her, and she looks forward not only to having these opportunities again, but also to being able to share and collaborate with members regarding the work of the NALP Foundation.

To learn more about the NALP Foundation or to review the resources available on its website, click here.

Click here to read Tammy Patterson's article, "Update on Associate Retention".

Learn about the latest industry trends from our PDC Trusted Advisors during our Fall Webinar Series. To learn more about our webinars, visit our Webinars Page on the PDC website.

Webinar registration opens approximately 30 days prior to the webinar.

Tuesday, September 29, 2:00pm ET **How to Make Online Learning Work for You (Yes...You)** Presented by Steve Gluckman, LawFirmElearning **Register Now!**	Wednesday, October 28, 2:00pm ET **Using 360's and Upward Evaluations** Presented by Larry Richard, LawyerBrain LLC
Thursday, November 19, 2:00pm ET **Tammy Patterson, NALP Foundation for Law Career Research and Education**	Thursday, December 10, 2:00pm ET **Jackie Cranford, Cranford Advisory Services LLC**

Dr. Larry Richard is recognized as the leading expert on the psychology of lawyer behavior. He has advised dozens of AmLaw 200 law firms on leadership, management, and related issues such as teams, change management, talent selection, assessment, and other aspects of strategic talent management. Widely known as an expert on the lawyer personality, he has gathered personality data on thousands of lawyers. A graduate of the University of Pennsylvania Law School, Larry practiced law as a trial attorney for ten years. He then earned a Ph.D. in Psychology from Temple University. For more than 20 years, he has provided consulting services exclusively to the legal profession. Formerly with Altman Weil, and more recently the head of the Leadership & OD Practice at Hildebrandt, he recently launched his own consulting firm, LawyerBrain LLC, which focuses on improving lawyer performance through personality science. He focuses on Resilience, Change Management, and Leadership. He is a frequent author and speaker on the use of positive psychology and applied behavioral science in helping law firms to succeed. He is a Gallup-certified Strengths Coach, and a licensed user of the MBTI, DiSC, and 15 other tools.

To learn more about Larry, click here to visit his full biography on PDC's website.

Learning to engage millennials is not the only challenge trending among PD professionals in law firms.

For Larry Richard, the Founder and Principal Consultant of LawyerBrain LLC, joining the PDC as a trusted advisor was a natural step in the progression of his relationship with PD professionals and members of the PDC. Larry has worked with PDC leaders and their firms for many years, and sees his new role as a Trusted Advisor as a win/win situation for both himself and PDC members. Larry describes his work with LawyerBrain as specializing "in applying the latest scientific principles of psychology and related fields to the common 'people' issues the PD professional wrestle with – motivation, managing change, leadership, building teams, building resilience, designing 360-degree surveys, repairing dysfunctional behavior, etc." With 30 years of experience studying the personality of the lawyer, he is able to turn these scientific principles into practical solutions using the unique data he has amassed over the years.

30 years of experience in the field of Legal PD provide Larry with a unique perspective into current trends and challenges in the legal PD industry. When asked to describe current PD trends, Larry described four trends which he sees legal PD professionals currently focusing on. The most common trend that he encounters involves a focus on teaching lawyers to manage change and its consequences. A second trend, closely related to change management skills, involves, in Larry's words, "a significant increase, on the part of PD professionals, in the interest in developing true leadership skills in a wider range of lawyers--not just knowledge about leadership, but leadership behaviors that actually cause others to follow." A drive to help Millennials develop professionally and work effectively with other generations is taking place at the same time. Larry says that, "good research is just beginning to emerge about what makes Millennials tick. They now represent over 80% of most associate ranks, and the early research shows that their values are indeed qualitatively different from those of preceding generations. Addressing these differences, and learning how to motivate, engage and develop this special group is a central challenge today."

Learning to engage millennials is not the only challenge trending among PD professionals in law firms. Larry finds that when firms come under pressure to do more with less, PD professionals are frequently called upon to build back up the dropping engagement levels of all of their firm's members, not only the Millennials. Insufficient resources not only cause a drop in engagement levels of firm members, but also cause add another layer of challenges to the role of the legal PD professional when pressures affect the behavior and outlook of lawyers. As Larry states, a "lack of sufficient resources; the low resilience of most lawyers, and its effects, e.g., low resilience causes many lawyers to need to act superior to PD professionals," is one of the key challenges legal PD professionals address today.

Learning to address these challenges may seem daunting to new members of the field, but Larry encourages new PD professionals to "embrace mistakes as rich learning opportunities." The field of legal PD is continuously changing and evolving as professionals learn, whether through their successes and failures or through research and study. As Larry states, "the last 15 years have seen an explosion of high quality scientific research about what produces high levels of engagement, resilience, and effectiveness. We now have the ability to achieve levels of excellence using know-how that simply didn't exist before." To Larry, this is one of the most exciting things happening in the field of legal PD.

Larry is currently working on how to apply the latest principles in psychology to working with Millennials, specifically to improve their levels of engagement. For more information on Larry's work and for useful resources, visit LawyerBrain's Resource Page.

LOCAL GROUP SPOTLIGHT: Washington, DC

The Linkletter is adding a new recurring feature where we will focus on the work being done at the local level by members of the PDC. If your local group is interested in featuring its programs in an upcoming issue of the Linkletter, contact Sally Burroughs at sburroughs@pdclegal.org.

Local Group Leader:
Johnna Story, Professional Development Manager,
Finnegan, Henderson, Farabow, Garrett & Dunner, LLP

The Washington, DC PD Group was founded in the early 2000's. The current group leader is Johnna Story, Professional Development Manager at Finnegan, following Andy Colón, Chief Talent Officer at Thompson Hine LLP, and prior to him, Jim Lovelace, Director of Attorney Training and Development at Pillsbury. The DC PD Group membership roster includes over 100 PD professionals, some just entering the field as well as seasoned professionals. Members hail from firms of all sizes, local law schools and government agencies.

What are the benefits of being a member?
One important feature of each DC PD Group meeting is the opportunity for members to network with each other. While we try to adhere to a strict starting time, the good news is that the vibrant networking that takes place sometimes delays our start time; what a good problem to have! Members want and appreciate the opportunity to catch up with each other.

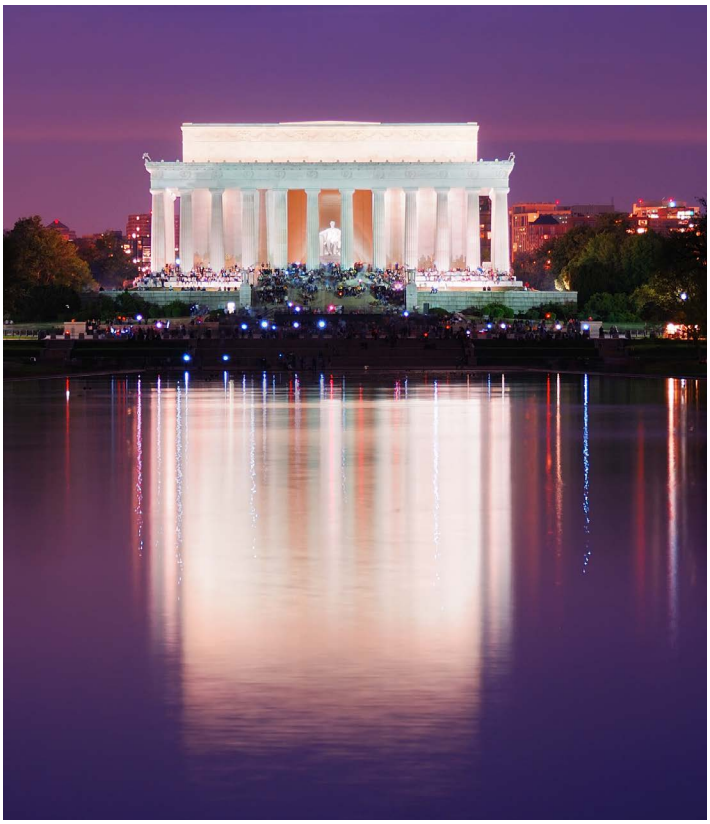
What happens at the meetings?
Many meetings are open discussions to share best practices on relevant industry trends and important topics. These meetings begin with a member providing a brief overview on that day's topic, followed by a free-flow discussion including the thoughts and ideas from the meeting members. At their most recent meeting on July 27, the group had a lively discussion based on three topics from the recent PDC Conference in San Francisco:

- Millennials in the workplace,
- Mentoring and shadowing programs, and
- Coaching programs.

At other meetings, a selected vendor will give a presentation about specific business skills and areas of expertise that benefit both the professional development of the group members, and develop possible contacts for firm training needs. For example, at the May 20 meeting, Alexa Polmer and Lindsey Cloud from KNP Communications presented useful tips on public speaking and professional presence.

When are the meetings?
The group meets approximately every other month and firms volunteer to host the meeting. The group is planning to meet again in early October, and gather for an informal holiday lunch or happy hour in December.

How do I join?
The DC PD Group is open to all PD professionals in the DC area. If you're interested in joining this vibrant community of professionals, please contact Johnna Story at johnna.story@finnegan.com or by phone at 202-408-4338. For more information, visit their page on the PDC website.



CANADIAN CORNER

Neil Guthrie is Director of Professional Development (Ontario) at Bennett Jones LLP in Toronto. He was previously a research lawyer at two major Canadian firms and senior legal counsel in the General Counsel's Office at the Ontario Securities Commission. He developed the curriculum in legal research and writing for the Law Practice Program at Ryerson University, and teaches Advanced Legal Research and Writing at the Faculty of Law, University of Toronto. The views expressed are his own.

You could call this the view from Canuckistan – where, it turns out, professional development unrolls much as it does south of the border, but with some local variation.

Canadian lawyers (we don't really call them attorneys) are subject to regulation at the sub-national level (we call them provinces, not states, up here). For the most, this is self-regulation: the law society of each province is a body of lawyers elected by lawyers to license and discipline lawyers, establish and enforce rules of professional conduct, promote policy initiatives and educate the public about the role of lawyers. The self-regulatory body in Ontario, Canada's most populous (and most lawyer-heavy) province, retains the charmingly anachronistic title of Law Society of Upper Canada, which Ontario hasn't actually been called since 1840. The LSUC, as we'll call it, also regulates paralegals, which is a novelty in Canada.

Most provincial law societies now require lawyers to complete a certain number of hours of continuing professional development (CPD), although the form and content vary from province to province. These requirements are relatively new, having replaced an honour system which asked lawyers to record and report their continuing legal education (CLE) activities in their annual filings. In Ontario, the mandatory requirement has been set at nine hours of substantive legal content and three hours of accredited professionalism, ethics and practice management. Two provinces, Alberta and Newfoundland & Labrador, have yet to impose an hours requirement. This may reflect the independent nature of these jurisdictions: Newfoundland actually was (briefly) independent from Britain before it joined Canada in 1949, and Alberta is known for a frontier, 'don't tread on me' mentality. Newfoundland will impose a 15-hour requirement next year, however.

When the new CPD rules came in, they were widely regarded by lawyers as a pain in the backside. Time has proved otherwise, to some extent. In a big firm like mine, the twelve Ontario hours are really not very difficult to achieve; our internal CPD programming is designed to make it easy for our lawyers to get all their credits (and some free food) – although this does not mean there isn't last-minute panic in December, when the CPD deadline approaches. Things are more of a challenge for those in sole practice, small firms, rural areas and in-house legal departments. Online learning is only a partial solution; in Ontario, there is a six-hour cap on solo viewing of pre-recorded online content (if it's live and interactive or you can find a lawyer colleague to watch with, there is no limit).

The challenges faced by in-house counsel have proved a marketing opportunity for big firms. We all put on a calendar of CPD sessions for external clients which are both educational and intended as business development. Clients get their hours and a nice lunch, we get to build relationships. The LSUC now lets firms become accredited providers so they don't have to apply for approval of sessions under the professionalism category, which is helpful. (All of this is trickier in British Columbia, Canada's westernmost province, where sessions which are deemed to smell too much of marketing will not be accredited at all.)

For all that the system works to the advantage of some, there are some vagaries and perverse incentives. As a tax lawyer pointed out to me recently, many of the valuable educational activities which were encouraged under the old self-reporting system – like self-study – are ineligible for CPD credits under the new regime. You can get credit for a webinar that you don't actually watch or listen to, or for attending a conference presentation that you block out because you're too busy dealing with e-mail on your mobile device. And some pretty fluffy content gets accredited for professionalism (some of it actually produced by the law societies themselves). Another downside, if you are a commercial provider of CLE content, is that your revenues are probably falling because of the number of new, lower-cost (or free) providers in the marketplace.

For individual lawyers, there is the possibility of being audited for compliance with the CPD rules. The LSUC has recently announced that it will no longer be conducting specific CPD audits, although adherence to the CPD rules will remain within the scope of the regulator's more wide-ranging (but rarer) random practice audits; and accredited providers will still be subject to the scrutiny of the CPD police. Cutting back on enforcement does make one ask whether we couldn't just return to the old self-reporting model. That is unlikely, and the cynic in me says that this is in part because the law societies are themselves providers of revenue-generating PD programmes.

As in the US, CPD requirements have institutionalized the role of the director of professional development. This is

a good thing if you're in my position (I get paid to do it), perhaps not if you're COO of a firm trying to cut costs (which, from my point of view, heightens the need to demonstrate the marketing value of CPD activities). Offering a busy calendar of sessions that will appeal to a wide range of clients and potential clients is an expensive proposition, especially where it involves high-priced speakers (typically – ahem – from the United States). Many of these speakers are excellent, but there are some who seem to think that the presentation that wowed them in Des Moines will necessarily translate to a sometimes very different legal and cultural setting here in the frozen north – or that we can't spot a canned speech.

CPD isn't, in the end, just about marketing or the cost of doing business. Having full-time PD staff can help to focus a firm's thinking about the recruitment and training of new lawyers, the development and retention of associates, and the grooming and assessment of candidates for partnership. Ideally, the professional development department can promote a culture of learning and mentorship within the firm. The mandatory CPD requirements imposed by Canadian law societies are presumably intended to foster these objectives (and others, like lawyer competence) – even if their implementation leaves something to be desired.

Neil Guthrie, Director
Professional Development (Ontario)
*Bennett Jones LLP, Toronto**

**The views expressed in this article are the author's alone.*

Join us on Social Media! The PDC is now on Facebook, LinkedIn, and Twitter.

Write for the PDC Blog!

The PDC now has its own blog, the PDC Link! If you are interested in writing for the blog, contact Sally Burroughs at sburroughs@pdclegal.org, or visit the PDC Link page on our website for more details.

THE BROWNSTEIN APPRENTICE PROGRAM

Marian Lee, Senior Director of Legal Talent, Brownstein Hyatt Farber Schreck

Marian Lee an attorney with over 16 years of practice experience and former professional development consultant, is Brownstein Hyatt Farber Schreck Senior Director of Legal Talent. Based in Denver, Marian directs the firm's professional development programs for attorneys in all offices, including orientation, in-house training, outside CLE opportunities, evaluation systems, and other programs that support the professional growth of the firm's associates and shareholders. Marian serves as a member of both the firm's Pro Bono Committee and the Professional Development Committee. Marian has created and presented training programs on Success as a New Associate, Effective Legal Writing, Generational Differences in Recruiting and Retaining Lawyers, How to be a Mentor, and Outstanding Client Service, among others. She is the author of published articles in local and national publications on how firms can motivate associates, upward evaluations, effective management of support staff, and encouraging the professional growth of attorneys.

Attorney development experts have long recognized the tension between economic pressure on partners and the quality of training and mentoring that new associates receive. Over the past three decades, the amount of time partners have to devote to associate development has decreased as firms have increased their demands of partners to not only produce more billable legal work, but also to generate business, manage clients, and participate in firm administration and committees. Given the relatively low level of recognition that firms give to associate development activities, it's not surprising that they often fall to the bottom of the list of priorities for partners.

To compound this problem, in the early 2000's, the war for associate talent caused first year associate salaries to skyrocket. This created even more economic pressure, not only for partners to produce more to support these higher salaries, but for new associate to bill more hours in order to offset some of the cost. Particularly in larger firms, the quality of junior associates' work assignments often suffered because the types of assignments that generate the most billable hours for first year associates – document review, research, due diligence, etc. – are often the least helpful to their learning and development, and require the smallest investment of training time by partner and senior associate supervisors.

At the same time, the once-common practice of including new associates in learning-rich opportunities to observe trials, hearings, negotiations, and strategic client meetings - even though clients couldn't be billed for that time – became more rare as firms began to more closely scrutinize partners' realization rates and time write-offs.

Then came the downturn. The legal industry was reeling as demand for legal work dropped sharply. Cost reductions, layoffs, and salary cuts were rampant. Summer associate classes shrunk and in some cases, offers made to previous years' summers were revoked. While the environment was hardly ideal for law firms, it did alleviate some of the pressures that worked against associate training and mentoring, and actually led some firms to create innovative programs to fill the gap in billable hours demand with developmental opportunities for associates.

After hearing about some of these programs, in 2010, Brownstein Hyatt Farber Schreck decided to create its own "apprentice program," with the goal of focusing the associate's first year on learning and development rather than on billing a high quantity of hours.

Announced in April 2010 and implemented six months later, Brownstein's program set hours expectations for first year associates that included 1400 hours of billable time, 200 pro bono hours, 300 hours of "shadowing" time, and 25-50 hours of formal training.

In order to lay the groundwork for the program, the professional development department communicated extensively with firm leaders, department chairs, partners, and other associates. An important component of the program was that unlike some firms' first year programs, Brownstein's did not reduce the first year associate's salary, even though the billable hour requirement was reduced. Accordingly, it was important to communicate to other associates that the program was not a reduced-hour program (under which the new first-year associates would receive the same pay for less work than past first-year classes), but rather, an intensive learning program that requires the dedication of over 1900 hours in the first year.

Partners had to be educated to (a) respect the goal of not overburdening first year associates with billable hours, and to (b) be alert for shadowing opportunities they could offer to the apprentices, such as attending trials, hearings, closings, negotiations, and client meetings. Department chairs in particular had to be educated about the program's goals and expectations, so that they would respect the reduced workload requirement and allow the apprentices to meet their increased pro bono, training, and shadowing expectations.

The fifth apprentice class in this program will complete its first year at the end of September 2015. Overall, the program has been a success. The 18 "graduates"

of the program so far have endorsed its continuation and said they found great value in it. They appreciated the reduced pressure to bill hours, the increased pro bono work that gave them front- line experience on small, low-risk matters, and particularly the shadowing opportunities. They recognized that they would not have been included in key meetings and events in some of their matters if the program hadn't allowed them to bill those hours to "shadowing" as opposed to clients. In fact, several clients expressed appreciation that the firm offered the associates' participation in their matters without charge.

The main challenge of the program so far has been that each year, the available work and needs of each department tend to fluctuate. The firm cannot ensure a completely consistent experience for each apprentice, and the hours in each category among the apprentice classes tend to vary greatly depending on work flow. To address these fluctuations, the program goals have been modified through the associate bonus policy, to provide that if the apprentice achieves 1400 billable hours, 200 pro bono hours, and 300 additional hours in any of the categories including additional billable, additional pro bono, shadowing, or training, they are eligible for a discretionary bonus.

The benefits outweigh the challenges, however. Learning is accelerated, as rather than doing piecemeal assignments without knowing how their work will fit into the larger case or deal, first years often have the opportunity to follow through with watching the hearing at which their motion is argued, sitting in on a negotiation discussing deal points that they researched, etc. Partners have the opportunity to spend more time training first years and expose them to stretch assignments without hurting their realization rates. The firm's average pro bono hours per attorney has risen significantly. And through the additional pro bono work, first years receive greater breadth of experience and level of responsibility than they could through work on larger, billable higher-stakes matters.

A NOTE FROM LARRY BROWN AND ORI PORTNOY

PDC Summer Conference Committee Co-Chairs

We want to say thank you again to the record number of you who were able to join us in San Francisco for this year's PDC Conference, and 25th Anniversary Celebration.

Our goal, along with the Planning Committee, was to emphasize and capitalize on the features that make our community of professionals so valuable – the amazing network of colleagues and friends, and an open forum in which we can all share ideas. We aimed, through both content and formatting, to provide opportunities to challenge each other to think outside the box and consider new and innovative approaches. And, in the spirit of the original PDC Conferences, our goal was also for members to walk away with highly practical takeaways that they could begin implementing the Monday morning after the conference.

The PDC thanks the Planning Committee for their dedication to a successful event! Debbie Atlas, Larry Brown, Lori Gauld, Emily Leeson, Jessica Natkin, Ori Portnoy, Linda Salem, Susan Tonking and Clarice Wahba.

We know we speak on behalf of the energetic, and highly dedicated Planning Committee when we say how privileged we were to put this conference together. This task was made much easier for a number of reasons: The PDC's executive team who took things to a new level in terms of making the conference professional and our collective experience so wonderful; the other PDC members who generously contributed in various ways and added their insights; the many exceptional presentation proposals (which made selection difficult, but finding great content easy); and the engaging presentations from PDC members, Trusted Advisors, and other supportive consultants whose collective enthusiasm, creativity, and willingness to share their expertise shaped the conference into a rich treasure trove from which we all drew with delight.

In the end, though, it was the open and supportive spirit of everyone who attended that made this year's conference truly successful and a very rewarding experience. Ideas were freely shared, and relationships with colleagues were deepened. Thank you all for giving freely to that environment! We look forward to reviewing your feedback, which will only serve to continue to improve future PDC conferences and our organization as a whole.

Thank you!
Larry and Ori


THE PDC SUMMER CONFERENCE IN PHOTOS

Annual PDC Walk

Burt Lipshie's Annual PDC Walk is a well loved tradition of the PDC Summer Conference. This year, Burt led conference attendees from the hotel to the Bay, visiting many sites, enjoying the scenery, and taking advantage of the morning to meet and connect with other professionals in the industry. To top it all off, many members rode the trolley back to the conference hotel.

25th Anniversary Luncheon and Panel

The PDC celebrated its 25th Anniversary at the conference with a luncheon and panel. Panel members reflected on the history of the PDC and celebrated its contributions to the field of legal PD. Current and Alumni PDC members participated in the panel discussion (Pictured here, left to right): Jane Eiselein, Amy Hancock, Burt Lipshie and Steve Armstrong.

Internationl Attendees

The PDC welcomed a number of international attendees to the conference this year, including two members from Japan and one from Australia. Pictured here (Left to Right): Taro Tsunoda, Anderson Mori & Tomotsune, Japan; PDC Trusted Advisor Terri Mottershead, Mottershead Consulting (Australia); and Maurice Rabb, Anderson Mori & Tomotsune, Japan

Welcome Reception

One of the most distinguishing characteristics of the PDC is in the relationships its members develop to support the growth of both individual careers and field as a whole. In keeping with this spirit of collaboration, the PDC Summer Conference offers an unparalleled opportunity to meet peers in the industry. In this photo, conference attendees enjoy networking and sweeping views of the City of San Francisco at the Welcome Reception sponsored by Fullbridge .

Past and Present

While the PDC Large Group Dinner is a highlight of the conference every year, this year was particularly memorable as Micron presented the PDC with a gavel in honor of its 25th Anniversary. In this photo, PDC Board Chair Amy Hancock (left) poses with past Chair Jim Lovelace (center) and Micron's Vice President of Global Sales & Marketing Derek Weihs (right), who presented the gavel at the Reception.

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