Everyone's Invited

Use a Project Management Approach to Create a Professional Development Program

by Kristin Linoski

When it comes to generating and managing a new professional development program, success (or failure) can depend on taking care of the smallest details. Targeted upfront planning and organization in the context of project management can increase the likelihood of a successful launch and enthusiastic word of mouth about your new program. The suggested steps in this article are based on successes as well as lessons learned from a classroom-based Paralegal Professional Development series implemented at Fulbright & Jaworski L.L.P. and coordinated by the firm's Project Management Office.

Form the Professional Development Program Project Team

Identify the stakeholders who need to participate as project team members to plan the professional development program. Consider representation from the following areas of the firm organization and across offices:

• **Project Management**
A neutral party to manage team meetings and be responsible primarily for coordination of logistics so that other team members can focus on their assignments

• **Professional Development and Training**
The authority on instructional design, learning paths and related metrics

• **Human Resources**
The authority on policies, performance evaluations and human relations topics

• **IT**
Experts on technology-centric topics and applications

• **Audio and Visual Technicians**
Specialists on "staging" the events with sound, lighting and media production

• **Target Audience Representatives**
One or two top performing members of the target audience who can provide input and real world perspective on the content and schedule

• **Third Parties**
External content providers and presenters

It is also important to identify the department that will own the ongoing, day-to-day operational support for the program after the project team adjourns. There might be overlap with the project team, or this could become the responsibility of other departmental resources. Getting these leaders involved early is advantageous in ensuring continuity from the initial design through ongoing implementation.

Determine the Program's Objectives and Audience

Highlighting the intended benefits at the firm or practice level is a good place to start, but remember to spell out the clear benefits for the individual members of your target audience. Marketing these relevant program benefits will help motivate target audience members who could otherwise be neutral, or even resistant, to professional development participation. The project team should associate metrics with each program objective and track these metrics as the program progresses (and make adjustments to the program as appropriate).

Some program objectives might include:

• **Fostering relationships between certain staff groups that might otherwise have few opportunities to meet or interact.**
Measure the objective by the rise in general morale; the number of requests for assistance with, and participation in, each other's work assignments; and the establishment of informal and formal mentor pairings.

• **Providing cross-training and exposure to concepts and systems outside the norms of routine assignment areas.**
Measure by reviewing pre- and post-training work allocation diversity and performance evaluation information.

• **Educating a certain segment of the firm population to be more technically or business savvy.**
Measure by reviewing pre- and post-training system licensing, usage rates, access frequency, data error rates or support call volumes, or by conducting pre- and post-training student assessments.

• **Providing a specific career-advancement path.**
Measure by reviewing the retention and promotion rates among the target audience before, during and after the program rollout, and by looking for correlations.

• **Boosting process efficiencies.**
Measure by the retirement rate of less efficient processes and tools, by budget savings or by more effective billing.

Once you've defined your objectives and target audience, double-check that all the right stakeholder groups are represented on the project team.

Get Adequate Management Sponsorship for the Program

After the project team has defined the program's "who" and "why," it is critical to ensure firm management understands and supports the program before proceeding. Who you choose as program sponsor might be based on the nature of the program and the target audience, but involving the executive director and an attorney member of the firm's professional development committee is recommended. The executive sponsor(s) can assist in many ways and can:

• **Affirm the program objectives and associated metrics.**

• **Set governing rules.**
This could include determining the timeline for the program, whether the program will be introduced firmwide or will start at a single office, and what matter can be billed for time spent attending the program.

• **Send communications to their peers about the program for a top-down communication plan.**

• **Introduce the program by speaking at the kickoff session.**

• **Approve the program budget.**
The budget might include one or more of the following: printed materials, door prizes, fees and travel expenses for outside parties, access fees for third party programs, DVD/CD production, facility reservations, refreshments and telephone or video conferencing fees. Keep in mind that one result of your program could be an increased interest in membership and certification with associated professional organizations, and firm reimbursement of these fees might be requested.

The project manager should establish a go-forward communication plan with the sponsor(s) to share updates on each of the above points. Communication style and frequency can be decided by the project manager based on the sponsor's preferences.

Develop the Program Framework

Once your executive sponsor is on board, the project team should dive into the more detailed logistics of the program and

Going Forward Without Moving Up

by Tony Hartsfield, Bryan Cave, LLP

I've been at my firm for nearly 12 years — all of them in the same department. During that time, some of my colleagues have moved up in their profession, from entry level specialists to engineers or managers. For most of those years, I've held the same title. That doesn't exactly sound like a glowing example of career development. Shouldn't I be more concerned about moving up?

While some need to climb the corporate ladder in order to make professional progress, others — like me — are suited to move forward without having to move up.

IT training wasn't my first career choice, but by the time I got a position at my firm, I knew what I wanted to do. My skill set and my passion have always been about teaching. I found this passion in the classroom 12 years ago, and I thrived.

But as the legal field entered the new millennium, so did our thoughts on training. Our team was challenged to standardize content and find new ways to deliver it to our community. Technology for development was becoming less expensive and easier to use, which provided exciting opportunities. We were still in the classroom, but we also moved into the studio to create online learning content. This new delivery method required a different approach to training, but it still appealed to my core desire to help people choose to learn. It was a natural progression, as we matured in our processes and product options, for our team to be involved in firm projects that required training.

End user training is no longer the last item on the project plan. Instead, we consult with project teams in early planning stages and continue consulting them through to deployment. This interaction has given us opportunities to assist other IT members in documenting their processes and building their firm communication skills.

ILTA has also provided me an opportunity to grow. The organization gives me direct access to the brightest and most influential people in my field. I have interacted with, learned from, been challenged by, and shared with them on a regular basis. It is deeply satisfying to me.

The past 12 years of my career are marked by forward progress. A few key factors contribute:

• **Personal discovery of where my interests and abilities fit into the work environment**

• **Changes in technology that open new avenues for exploration**

• **Managers who recognize my strengths and provide opportunities for expansion of my contribution and influence in the department**

• **Like-minded colleagues who enjoy working as a team**

• **Professional organizations, like ILTA, that provide stimulating interaction with others in my field**

I respect those that still desire to move up in their careers. Organizations need some to aspire to climb the ladder. But while you're waiting for the next upward step, be sure and keep moving forward where you are. **ILTA** establish administrative procedures. Consider developing a standard process or template for each of the following:

- **A questionnaire to gauge the interest and readiness of the target audience**
- **Program communications (memoranda to attorneys and target audience)**
- **Facility reservation and setup**
- **Registration and sign-in tracking**
- **Post-training evaluations and skill assessments**
- **Participation enforcement and rewards (perhaps something special for perfect attendance)**
- **Storage of presentation materials (in the document management system, for example)**
- **Audio and/or video recording**
- **Accreditation documentation (CLE or other)**
- **Make-up classes (for new hires, missed classes)**
- **Logging requests and ideas for future classes or topics**

All of these materials can be packaged for distribution to program coordinators at other offices so that the rollout process is consistent across the firm.

Avoid the "Gotchas"

As challenging as it might seem, it is possible, even critical, to deliver a polished professional development program that is also engaging and interactive. To achieve this balance, the project team should look for hidden "gotchas" or potential pitfalls during planning and implementation:

• Bypass conflicts.
Allow for some scheduling flexibility to accommodate other activities that might compete with your program, such as existing professional development programs, holiday seasons, office events and client demands.

• Nominate a moderator.
Coach speakers and audience members on the importance of brevity, clarity and volume, especially for recording purposes. A moderator might need to repeat questions from the audience or provide a microphone to audience members so their questions can be heard and recorded.

• Make it interactive, but not too interactive.
The moderator should facilitate the interactive sessions and group activities to ensure they do not turn into unstructured feedback or complaint sessions that derail the class agenda.

• Solicit volunteers.
Invite members of the firm and the target audience to volunteer to present topics to their peers. Real-world case studies can be very informative and these presentations could help develop the public speaking skills of individuals who don't often get the chance to present. Packaged materials provided by third parties might not be relevant to your firm culture or jurisdiction.

• Keep it fresh.
Topics pertaining to new technology or emerging areas of law can have a relatively short shelf life, so a disclaimer regarding the content's "expiration date" might be warranted.

• Consider privacy issues.
If any of your class topics are of a sensitive nature, allocate some unrecorded time to allow participants to speak freely. Some students prefer online course evaluation forms, and some prefer hard copy. Provide both to ensure that you get feedback on the effectiveness of each course.

Are there other constraints that have had a negative impact on your firm's professional development programs in the past? Apply those lessons learned this time around!

It might seem unusual to approach the development and implementation of a new professional development program as a formal project. However, the common project life cycle components of planning (objectives and audience), communicating (with sponsors and other stakeholders), governance (standards and procedures), scheduling and execution (program logistics and managing issues) can certainly be scalable and adaptable enough to benefit many areas of the law firm, including professional development. ILTA

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