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Want A Competitive Edge? Invest in Your Training

developers · Monday, September 21st, 2020

Training is one of the leading factors that creates the largest gap between buying and utilizing technology.

For many people, even the word “training” triggers a whole host of negative feelings from angst, stress, and even dread.

But training doesn't have to be such a pain point. At its core, the key is to look at technology training as an investment rather than a cost. To foster a mindset that training is a piece of a holistic project versus an unavoidable burden.

Let's take a look at 5 key questions that can help you get the most out of your tech investment.

1. What are the elements of an effective, successful training program?

Leadership Buy-In

First and foremost, the leaders in a firm need to be the advocates for the training. Partners and firm administrators know exactly what they want to achieve with the software, and that information should always travel from the top down. Overall success can largely be controlled by the expectations that upper management sets early on. Clearly defined goals and objectives will naturally promote a sense of direction and purpose for the training.

Micro-Learning

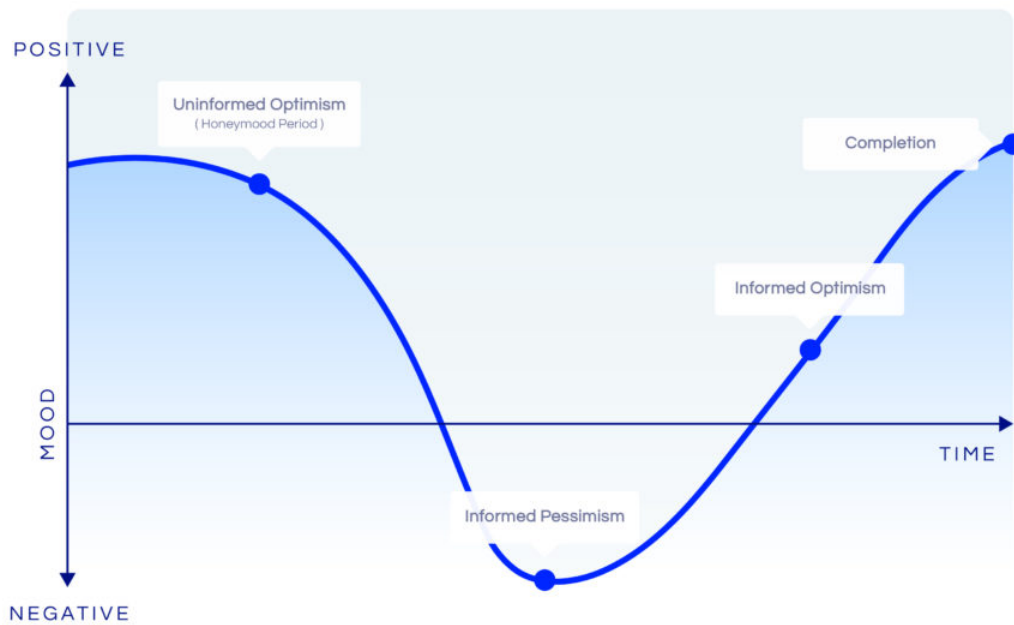
The hope of any training is that your staff retains what they learn. [Studies today show](#) that our retention rate for audio/visual material is about 20% in any given session. And if that training surpasses one hour, we retain less than half of the total information presented. Crazy, right? So, how do we combat this? You guessed it, with micro-learning. The key is to break your training into sessions. Never do everything all at once or you can guarantee that your staff's retention will be less than noteworthy. A common complaint is that training takes time away from completing day-to-day work. With micro-learning, you can not only prevent mind drifting, but also reduce the stress associated with not finishing work or meeting specific deadlines.

Relevance of Information

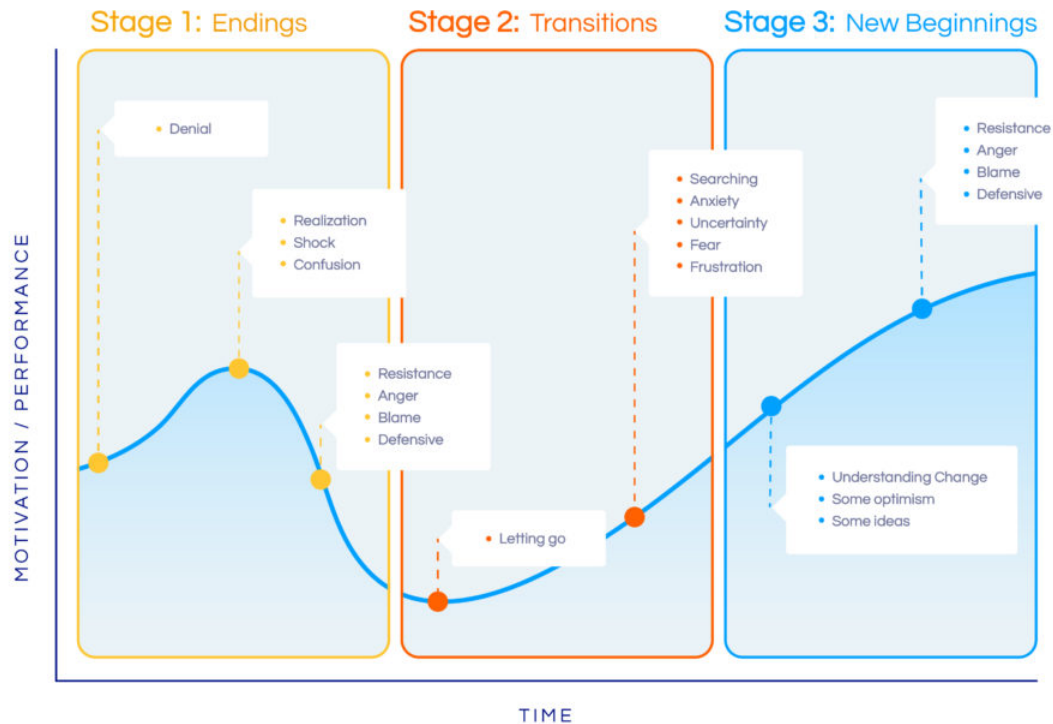
Break your training out by content and who it specifically pertains to. The best way to maximize engagement is to provide training material that is relevant to the work each person has to produce. Matching training content with staff roles will also encourage specific questions that will allow for deeper discussions on pointed topics within the training. Everyone's work and expectations of producing that work are all different. Keeping that in mind throughout your training sessions will lead to a happier, more attentive team. Another key to utilizing relevant information in your training is to import your firm's own data into the system prior to the training. You can combat the foreign nature of a new software with the familiarity of known data. When people see information they know, they will not only grasp the concepts you're teaching faster, but they will naturally be more inclined to learn.

Reinforce

Now that you have gotten through your initial steps of training, you may think the most important part is over, but don't be fooled! Reinforcing that information is just as crucial to ensuring you are implementing it correctly, avoiding bad habits, and maximizing the potential of your investment! Simple steps like hosting a Q&A session once a week or providing a resource library with videos and guides will go a long way in making sure your team is less reactive if issues appear down the road. Most importantly, make it fun! Training and review sessions don't have to be as awful as they sound. Bring food, have giveaways, create an atmosphere that makes it easier to learn the new material. If you are constantly reviewing best practices and streamlining your sessions to focus on specific questions, you will see an overall faster adoption time and run into less user error in the future.



The Positive Change chart above shows the emotional cycle of new users and the effect the technology adoption has on their mood as they go through the training process. Reinforcing relevant material will help reduce that drop between Uninformed Optimism and Informed Pessimism.



The Staff Emotional Cycle of Change chart gives a high-level view of the unavoidable stages a team will typically go through in the period of a new technology adoption. The pit between stages one and two can be minimized with effective training.

2. What are a few different types of training and which is the best for law firms?

Instructor-Led and Group Discussion

There are a variety of ways a firm could structure how they train their team. From hand's on individual coaching, group lecturing, and instructor-led training, the style you choose is entirely up to your discretion. However, for law firms looking to adopt the best practice of a new cloud management system, instructor-led training and group discussion are the two most ideal types of training. Instructor-led is the most beneficial if you're in a remote environment. If everyone is on Zoom together, it is important to have one leader who can direct the group, answer questions, and have a specific roadmap for that session. This style of training is also great for efficient micro-trainings on specialized material. Group discussion is also a preferred method of training because you will be able to break your team out into a variety of segments based on attendance size, relevant content, and personality of the group. Group discussions tend to boost participant engagement and foster an environment that is better suited for questions and suggestions.

Superuser

Superusers are composed of individuals from different departments within a firm who have the strongest grasp of the new software. The goal of these users is to be prepared and make sure that the objectives of each training session are being met and discussed. These superusers, whether they're partner's, firm admin's, or tech-savvy paralegal's, need to prioritize discussions around various decisions, procedures, and facilitate the overall configuration of each training. All training decisions will be made by this group of superusers prior to attorneys and other staff members getting involved. Superusers provide a unified voice to the rest of the team and offer immediate support for the staff on go live. Superusers are critical to helping keep the internal environment calm and minimize that emotional dip of informed pessimism.

The Timeline for a Training Roll-Out

Superusers should be involved in the training process from day one all the way up to go live. Typically, attorneys can be up and running with the software after an hour and a half of initial training, however, paralegals, secretaries and firm admins may need more time. Training time largely depends on whether utilization is streamlined or more manual, and how active leadership is in encouraging their staff to view training as more of a benefit than a hindrance.

3. How do I evaluate a trainer?

Successful adoption of a new technology will largely be determined by training. A great trainer is someone who is empathetic, patient, and can adjust their teaching methods to best suit the learning styles in the room. It is important that your trainer is someone who will go through all the ups and downs with you throughout the process. You can ask your technology vendor who will be training you and ask them to come to the office as soon as possible for initial discussions. Don't be afraid to interview the trainer, make sure their skill set is at a level you need it to be, and make sure they understand the preferences and personalities of the people they are going to train. Some software vendors offer free training, but don't let the word free deceive you. With free training, you will simply get what you get. You won't have much control over when the trainer comes in, nor will you have much flexibility to select a different trainer if the one given to you doesn't meet your needs. Getting the right trainer is half the battle in ensuring you're getting the most out of your technology investment. If the person isn't the right fit, it could lead to poor adoption of the material.

4. How do I evaluate the success and effectiveness of a training program?

This question largely depends on how deeply you want to analyze the training. You have to decide whether you're going to do a general cost-benefit analysis or a long-detailed cost-benefit analysis to determine if the training is meeting your ROIs. Prior to the start of your training, ask yourself what you're trying to measure. Are you looking for more billable hours? Trying to create an environment more appealing to younger attorneys? Attract new talent? These goals will help measure what you're looking for. The easiest way to evaluate the training is by getting your staff involved. Create surveys, have pre and post-training assessments, and self-evaluations. Giving your staff a voice will not only decrease inefficiencies but will allow you to change strategies and pivot approaches when need be.

5. Why should I measure the effectiveness of my training program?

There are so many metrics to gauge performance, from marketing reports, KPI's, and applications with metric dashboards at a glance, a firm can measure their performance on many levels, but what we aren't measuring is how teams are really doing with their software. Could they be doing better? Are they using the most effective strategies? Are they streamlining the process? Additionally, users are now working remotely, so how can we measure performance in a way we've never had to measure it before? All of those answers will point to the areas where you need more training. If you can measure your learning objectives, you will be able to measure your efficiency metrics a little better. Everything is being broken down and analyzed these days and training shouldn't be an exception. At the end of the day, if you can locate your efficiencies, you can increase your competitive advantage. For example, let's set a goal of increasing your billable hours. What do you do next? Well, you can invest in technology that gives you features like [Automated Time Capture \(ATC\)](#). ATC functions solely to help you bill more hours. But what if you don't know how to use the tool? Looks like you won't be reaching your goal.

If you have the tools but they are never used, you're not going to gain the efficiency and you might as well not pay to have the tool in the first place.

Training is essential. Proper training that fits your firm's needs is crucial. You will get the most out of your technology investment by embracing training, tailoring it to your firm's needs, and evaluating its overall effectiveness.

We want to thank Laura Kennedy, Co-Founder of Circle Management Group, for providing the Positive Change and the Staff Emotional Cycle of Change charts. Laura was also pivotal in conducting the webinar, [How To Get the Most Out of Your Tech Investment](#), hosted alongside

Centerbase's own, Rob Joyner, VP of Sales and Marketing. This blog was written based off their discussion on how proper training can make or break the successful adoption of any technology investment.

Laura has over thirty years of specialized technology training and change management experience. Her approach to training has helped thousands of professionals adopt new systems and processes.

This entry was posted on Monday, September 21st, 2020 at 12:00 am and is filed under [Growth & Strategy](#). You can follow any responses to this entry through the [Comments \(RSS\)](#) feed. Both comments and pings are currently closed.