



BANG FOR YOUR BUCK\$:
Getting the Most From Your Consultants

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1

What to Expect

- Your Role in Training
- Pros and Cons of External Consultants
- Considerations and Tips for Selection
- Bang for your Bucks: Fee Negotiation
- Looking for Lagniappe
- Confirming the Deal
- Ensuring Consultant (and Program) Success
- Final Tips

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2

Who We Are and Who Are You



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3

Types of Consultants

Presenters

Coaches

Curriculum designers

Evaluators of systems/processes

Survey takers, needs assessors

Focus group facilitators

Folks willing to do the projects you don't want to (or have time to) do!

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4

Recognizing Your Role in Training

More than sending invitations/reserving rooms, but designing and delivering top-notch programs

- Training should be:
 - Learner-centered (with elements of visual, audio, kinesthetic learning)
 - Fun, engaging, and interactive
 - Practical and relevant
 - CLE eligible when appropriate
 - As good as it can be!
 - Don't be afraid to change it up/Think outside the box

5

Internal v. External Presenters

	PROS	CONS
INTERNAL	Demonstrate/build support Are aware of firm culture/language Allow you to showcase talent	Costs lost time Subject to last-minute cancellations Can be intimidating Not always good presenters
EXTERNAL	Are specialists/experts Are prepared, experienced speakers Are not intimidating Provide perspective and fresh thinking	Can be expensive Are unaware of firm culture/language Need to be willing to customize

6

Selecting the Best Consultants

- Know your objectives . . . and your budget
- Utilize your resources to identify the best
 - Recommendations from peers
 - PDC list serve, NALPConnect, LinkedIn
 - Consider other sources and diversify:
 - Colleges, law school and b-school faculty, clients
- Do your due diligence
 - Ask to attend a program, watch a video
 - Ask for and check references
 - How was she received? What could Molly have done better?

7

Getting Bang for Your Bucks

- Hourly? Fixed or flat fee?
- Ask for a discount
- Confirm travel expenses
 - Can you share travel costs with another firm?
 - Should you set a per diem for meals?
 - Firm travel agent, travel policy
 - e.g., no first class

8



Looking for Lagniappe

LAGNIAPPE

noun [lan-yap]
1. a little something special.



- Ask to record the program for replay
- Videoconference to multiple locations
- Ask for other services like competency review/coaching
- Ask for take-aways like checklists, reading lists

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9

Confirming the Deal



- Know your organization
 - Do you need a contract? SOW? Approval?
- Confirm all details in writing (fee, travel, cancellation, recording, date, location, duration, deliverables, deadlines, learning objectives, etc.)
- Make sure consultant executes a confidentiality/nondisclosure agreement
 - Should not use firm name without permission

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10

Ensuring Success

What is the goal of the training or project?

- Increase professional competence/skills
- Assess existing programs/processes
- Design/implement new programs/processes
- Support recruiting efforts
- Minimize risk of malpractice
- Meet CLE requirements

Ensuring Success

- What are your learning objectives?
 - “Attendees will ...”
 - “Participants will learn ...”
 - “Key take-aways will be ...”
- Is it part of a larger curriculum (and aligned)?
- What does the consultant need to know about the firm?

Ensuring Success

Train (educate) the trainer (consultant):

- History/current events
- Evaluations of prior programs
- Competencies
- Firm culture
- Vocabulary
- Stakeholders and participants
 - Ask if consultant is willing to talk to attendees in advance



Final Tips

- Confirm all details with the consultant the week before
 - Location, start time, duration, learning objectives, materials, technology needs
- Ask the consultant to confirm arrival in town
- Ask consultant to arrive early to test tech
- What could go wrong? Be ready for it!
- Follow up and send feedback to consultant
- And get the most bang for your bucks!

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