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## Terms of Engagement: The 2013 PDC Annual Summer Conference, Experimenting with a New Approach

*Mary Gardner Burrelle and Elizabeth Foster-Nolan*



When the call went out in January for volunteers for the summer PDC conference, things were a bit quiet, the holidays were over, associate reviews were finished, and it finally felt like there was some extra time in the day. So we both volunteered enthusiastically—yes, of course, we would be glad to help! PDC Colleagues Anthony Grumbach, Kathleen Dunn, and Bronagh Hollywood also jumped into the planning frenzy.

As anyone who has helped plan a conference knows, the planning committee is always looking for something different, something to make the conference stand out and make the potential attendees get excited about coming to the conference. We were no different. We knew we had the great city of “Bahston” in summer as a draw, but we wanted something more.

### The Planning Process

After reviewing feedback from prior PDC conferences, it became evident to the conference planning committee (CPC) that conference attendees most enjoy engaging with each other in meaningful ways to build relationships, cultivate knowledge, and have constructive dialogue with other like-minded professionals. In planning this summer’s PDC conference, the CPC focused in on creating a space where conference

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participants could share information, experiences, and ideas in a way that could help us all build relationships and collective knowledge.

We started brainstorming and came up with the theme and title for the conference: “Terms of Engagement, Building Communication and Collaboration.” After much discussion and debate, we decided to step outside the comfort zone of the typical conference format and try two new ideas: “PDC Talks” in the style of the famous Ted Talks, short talks designed to engage and deliver ideas worth spreading (see [www.ted.com](http://www.ted.com) if you haven't yet watched a Ted Talk); and then something most of us had never heard of, but were intrigued by, the “World Café” methodology—PDC style, of course.

We asked for Ted Talk ideas in our request for proposals and were not surprised when our PD colleagues came up with some great ideas. We narrowed the field to 5 PDC talks.

To get the World Café methodology to work effectively at the PDC conference, we first had to understand the concept. The “World Café” is a tool for bringing large groups of

people together for thoughtful, targeted discussions and decision-making. The idea is to cultivate meaningful, powerful conversation about questions and issues that matter to participants.

World Café was one of several large-group methods of facilitation that emerged in the 1980s and 1990s when organizational development practitioners were working to bring together concerned groups of individuals within organizations—*i.e.*, “stakeholders”—for meaningful dialogue about organizational and systemic issues (Bunker & Alban 2006, 4). It was developed by Juanita Brown in 1995 and has since been used in corporate, nonprofit, and university settings (Brown & Isaacs 2005, 5 and 7; Bunker & Alban 2006, 28).

The magic of the World Café lies in the logistical set-up and targeted conversation topics. Participants come together around café-style tables that seat four to six people for two to three successive rounds of conversation. Each table has a facilitator who hosts a round of conversation regarding a well thought out, pre-selected question. Questions for discussion typically invite exploration, discovery, and inquiry rather than advocacy, argument, or advantage. All of the tables are covered with butcher paper and have markers and pens for taking notes, capturing key concepts, or simply drawing and doodling. The idea is that participants are able to visualize and build upon key learnings as they emerge by outlining, drawing, or diagramming them.

Each round of conversation typically lasts 20-30 minutes. After the first round of conversation, the participants all rotate to sit at a new table to discuss another question for 20-30 minutes. A typical World Café hosts three separate rounds of conversation set up in this rotational format. The table facilitators stay at their designated tables throughout the World Café, welcoming new participants in each successive round of conversation and briefly summarizing the key learnings from the initial conversation(s) for the new group of participants to their

table. The role of the table facilitator is to help the participants in successive rounds dig deeper into the conversation topic. After three rounds of conversation, interesting patterns start to arise; and ideas, questions, and themes start to link and connect.

At the end of the conversational piece of the World Café, a larger debriefing is held where a synthesis of the discoveries regarding each conversational topic is presented in a larger group conversation. Learn more about the World Café methodology at <http://theworldcafe.com/about.html>.

## The Conference

On the first day of the conference, after a very interesting Opening Keynote Session by Professor David B. Wilkins of Harvard Law School about professional development and inclusive leadership, we launched into the first-ever PDC Talks.

We were not quite sure how this was all going to work, nor were those presenting the PDC Talks. But the talks went off without a hitch, and each speaker successfully engaged the attendees:

Steve Armstrong gave the first PDC Talk, *“Thinking about Partners—What’s on the Horizon?”* He inspired us and made us think about where partner development is going and why we should care.

Diane Costigan took her passion for wellness and combined it with what we do every day in her talk, *Wellness and Legal Talent Development*. She described how wellness impacts us all and how we can encourage those we work with to look at wellness as an essential part of development.

Anthony Grumbach shared personal experiences to bring home the importance of communication in *Two Emergency Rooms and a Law Firm*. He

illustrated that how we communicate in certain situations can impact our learning and collaboration styles.

Milana Hogan explained that we can be more fully engaged in our work by understanding that we all do better when we are using our intellectual quotient (IQ), emotional quotient (EQ), and meaning quotient (MQ). The quotient analogy alphabet made more sense after listening to Milana’s *Can Lawyers Experience Flow in the Workplace?*

Kathy Morris wrapped up our talks and motivated us to think outside the box and challenge ourselves with her *Thinking Bigger, Thinking Newer, Thinking Fearless*.

With a sigh of relief, we moved on to the World Café.

The session was hosted in a large ballroom, transformed into a PDC Café, complete with coffee, snacks, music, butcher paper for tablecloths and colored pens/pencils to record and generate creative conversation. The ballroom was divided into 3 separate zones: pink, blue, and green. Each colored zone was assigned one of the broad, thought-provoking questions listed below, and attendees began the session in a particular zone/question, rotating through the other zones/questions as progressive conversations occurred. In keeping with the overall theme of the conference, the pre-selected questions for conversation were:

- What would a culture of collaboration look like in the law firm context? How could that be created? (green zone)
- If you had the power to build the best PD Department in the world, what would it look like? How could you accomplish that? (pink zone)
- What does it mean to you to be fully engaged in your work? How do you stay engaged? (blue zone)

The session lasted three-and-a half hours; and, by the end of the conversational rounds, every attendee had the opportunity to discuss the three questions above with various PDC colleagues.

After the third round of conversation, each zone then synthesized and presented the key learnings from its particular zone/question to the larger group. Supplies were provided to encourage thinking outside the box and getting creative with the presentations (e.g., markers, posters, colored sticky notes, scissors, glue, etc.). Each question had very interesting takeaways.

1. **What would a culture of collaboration look like in the law firm context? How could that be created?**

This group identified key areas for collaboration in the law firm context, and shared examples of collaboration. At a high level, the key areas for collaboration included: implementation and facilitation (e.g., create a cross-departmental “think-tank” on certain priority projects), building relationships (e.g., host brown bag educational lunches across administrative groups), culture (e.g., work with management to lead/drive a culture of collaboration), and education (e.g., teach office heads and practice group heads about collaboration).

2. **If you had the power to build the best PD Department in the world, what would it look like? How could you accomplish that?**

This group identified five key concepts that the “best PD Department in the world” would have, which included: a seat at the table; a diverse, connected and engaged team; the right technology; strong leadership; and relevance to its constituents.

3. **What does it mean to you to be fully engaged in your work? How do you stay engaged?**

This group created a “wordle”—also known as a word cloud (see below)—to illustrate the themes regarding this question.



The PDC Talks and especially the PDC Café required quite a bit of logistical planning and execution. But watching colleagues interact with each other—and seeing the different ways people came together to present to the larger group—was in itself a great learning experience. More important, we were able to achieve what we set out to do back on that cold day (at least for those not on the West Coast) in January: to get people engaged, to facilitate collaboration, and to support genuine connection and communication.

Our hope is that these unique tools and the information shared at the conference might somehow be incorporated into other conferences, or even in our own home offices and in our local PDC regions.

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the practice areas to help associates attain the skills and experience needed to counsel their clients at an increasingly sophisticated level consistent with (a) the highest level of lawyering, (b) teamwork, and (c) civility towards and respect for all parties. She is also responsible for the Firm's Mentoring and Sibling Program which serves to integrate and assist associates in their development within the firm by matching every associate who joins the firm with a Director and an associate who can teach them about the firm from their perspectives.

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Elizabeth is an active member of the PDC and the Boston Legal Talent (BLT) group. She recently became certified in Myers-Briggs testing (Parts I and II). Active in her community, Elizabeth regularly moderates candidates' forums as a trained Massachusetts League of Women Voters moderator. She is also the Vice President of the Abigail Adams Historical Society, which recently completed a major renovation of Abigail Smith Adams Birthplace in Weymouth, MA.

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# A Practical Guide to Succession Planning for PD Professionals

*Dottie Palazzo*

**T**his article addresses the age-old questions: “Who replaces me if I am hit by a bus? Or if I decide to leave my firm?” While managers and their organizations recognize the potential problems and impact of these questions, they very often do little until a manager gives notice—when it is too late to begin thinking about a systematic and effective succession plan.

In the case of manager retirement, there is a little more time for planning and implementation. At the end of last year I retired after many years with the same firm. Looking back over my succession experiences, I have identified six phases of the process, which are described below.

## 1. Preparing your staff (and yourself!) for your departure

I had no intention of retiring at age 65 but realized that age triggered the necessity of preparing my staff and myself for the inevitable. We began talking openly within our department about the future.

When I retired I wanted my staff to be in a good position to stay or go on to a new position at the same or a higher level. I had always allowed them to be responsible for their own work, but at this point I promised to stick around for a few years and teach them everything I could. I began transferring responsibility for some of my duties to my staff. One was a detail-oriented person like me; the other was a big picture person. I kept those distinctions in mind and delegated duties accordingly.

I took time to teach them what to do and why, but then I let go. This was the hardest part: letting go and recognizing that my way wasn't the only way to do most things. What

really matters is the end result; so I stepped back, allowing them to be more autonomous and less dependent on me. This went on for several years and was important. It prepared me for the Big Let Go to come and allowed them to grow.

Over the years we had developed a robust homegrown CLE database. During this process we began adding information to this resource, such as how to calculate speaker credit, carryover credits, exemptions, etc., and permanently recording information I had in my head on administrative functions like contract renewal and reporting dates. We also began a push to get all bugs fixed and to make any necessary enhancements.

In other words, we did everything we could to get ready for my retirement other than to pick a date or announce it to the firm.

## 2. Selecting a successor

There are three options for finding a successor: promoting from within the department, promoting from within the firm, or hiring from outside. I was promoted from within the firm twice so always favor that choice. At this point I still had not announced an intention to retire to the firm; but, anticipating that when I did I would be asked for a recommendation of my successor, I began looking for potential in-house people who might possess the necessary qualifications.

The first step here is to determine the qualifications necessary for the post you are filling. The nature of our work is very detailed, and the manager needs an intimate working knowledge of state and international rules—all of which are different and changing—in order to supervise and maintain the proper functioning of the

department. So we needed someone who was detail oriented, with a good memory and keen mental organizational skills. Other leadership qualifications—confidence, independence, and the ability to withstand criticism and say “no”—would also apply.

In the meantime, a part-time employee doing special projects contacted my boss requesting a move to full-time employment. She had previously been a successful manager in a position related to mine. She was well qualified, well known and respected by the lawyers, and well suited for the position. I agreed that she was the best candidate, and she became my successor.

### **3. Announcing your successor and managing the transition**

I announced to my staff that the firm had selected an experienced in-house manager in Atlanta to be my successor. Unfortunately, it was a surprise and they couldn't understand how their new boss could be located in another state. They didn't like it. What employees ever like big changes? I found myself in the position of being the middle person. I maintained an open door to them throughout the transition process, listened to their fears and concerns, and interceded for them when necessary and appropriate.

I was in no rush to retire and my boss wanted a seamless transition. She gave us two and a half years for training and transition. I agreed to retire at that time in fairness to my successor: having me stick around in any capacity would only dilute her effectiveness as the new manager. Two and a half years may seem like a long time, but we encountered some problems and in the end probably could have used another six months.

With one month from the date my successor accepted the position until her start date, I

immediately began preparing a manual for use in training and as a future reference. As I mentioned in item 1, we had already updated information and had materials such as checklists, sample forms, and standardized memos ready for this manual. I organized all that material into two huge loose-leaf notebooks, one for me and one for my successor: since we were in different offices, we each needed a copy so we would be looking at the same thing in training or when she had questions. We actually continued adding to this resource up to the last days before my retirement.

### **4. Integrating your successor**

My successor was located in another office in another state and was not moving to Cleveland. During our two-and-a-half-year transition period, she came to Cleveland one week every month or two and for a day or two on other occasions as needed. During her first week with us, she spent a day with each of my staff, so they could acquaint her with their duties. The balance of the week she spent with me, talking about what we do and who we interact with in the firm and in the outside legal environment. We went over the manual step by step to give her an overview; at the end of the week she took her manual back home and we began the process of working together.

At this point I was still the manager and she the trainee, so little changed for me other than copying her on everything I did and including an explanation of what we were doing and why.

Because it was also important that she meet every one of my professional contacts outside the firm, she and I went to ACLEA and PDC meetings. Having lunch and dinner with my colleagues-turned-friends was a fun part of the transition process.

## 5. Cooperating on a new organizational plan

I had been aware for some time that we needed to add services and resources and to reorganize our department. But, since we never had enough time or personnel, we had never gotten to that. Now—with two and a half years for transition, an extra set of hands, and the need to go over everything with my successor—we took the opportunity to review everything and to make decisions together on what services to add, how to redefine job descriptions, and to add resources to the firm's intranet.

Some of those decisions resulted in working with our IT staff on augmenting our database. Although we decided on the changes together, my successor did all the work. The result was that when I left she inherited an improved department that she understood and “owned.” This was hard, but nobody ever said giving away your baby would be easy.

In this process we re-evaluated our staffing and hired an additional assistant to work with the two experienced staff members in Cleveland. That new hire required training from each of us—but especially from me. We were now far enough along in the transition that I had become the extra set of hands.

As part of the reorganization and increase in staffing, we consulted my two existing staff members and allowed them to identify which of the new duties they wanted to do and what duties they wanted assigned to the new hire. We felt that this collaboration would help unify the new manager and her staff.

## 6. Managing the shift in power for a successful transition

The power shift began when we were about a year and a half into the transition. We hadn't calculated at the outset when this shift

would occur; we simply paid attention to when it made sense as my successor grew into the job. While I knew it was coming and that it had to happen, it was difficult watching people who were loyal to me for so many years begin taking orders from someone else and shifting their loyalty to her.

**Responsibilities of the successor for a successful transition.** The successor needs to pay close attention to the reactions of her new employees to her leadership style and to flex her personality and attitudes in ways that make them feel comfortable. Earning their loyalty and respect is imperative to her success. They already know more about the work and how the department runs and may feel resentment at having to teach her. She may have her own ideas and plans for how things should work, but she needs to be sensitive to the personalities and attitudes of her new employees because she needs their help.

**Responsibilities of the outgoing manager for a successful transition.** The outgoing manager must listen to the concerns and complaints of her employees and try to reassure them and answer their questions. While alerting the successor to the temperature of the staff and areas of concern that need to be addressed, she must also keep the confidences of her former staff members. However she might have done things differently, the outgoing manager needs to respect the decisions made by the successor. And, as I've said before, letting go is the hardest part: she needs to know when to leave and then to stay away once she does.

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While the transition to a successor is a business matter, it is also very personal. Aside from the practical considerations, it elicits emotional reactions from all parties involved which can't be ignored if you want a successful transition.

It has been almost a year since I left, and I have not had even one urgent call asking, “What do I do next?” Our success involved many factors, including firm support to allow sufficient time for the transition and no hurry on my part to move on. This isn’t always the case, but the steps and phases reported here can be adapted to smooth the succession process in other situations as well.



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are those of the author and do not reflect the opinions or views of her former employer.

### **Quote of the Quarter:**

“In what has become a race for speed, people have lost sight of what’s required to make effective learning experiences. Faster isn’t better if the end product doesn’t help people develop transferable skills.... Hastily built courses with superficial instructional design have really discredited our profession and industry.”

— E-learning designer Michael W. Allen in August *T+D*

## My Favorite Models: Part 1 of a Series

# The Nine Performance Factors

I was meeting with a highly successful IP lawyer, a “star” performer in his practice group, to collect tips and best practices for training. We strayed into a discussion of the instructional design process, which I sketched out for him; and he hooted, “Oh, you’re doing that consultant thing with the boxes and arrows!” I was using a model.

Models have always been valuable tools for me, both in-house and out. They provide a clear, complete, and simple visualization of a subject or process that helps to organize my thinking and guide my actions. A good model is also intuitive enough that it can be used to communicate our thinking to others, even if they’re not familiar with the subject matter. And the best models provide an “aha!” experience on first exposure, when a lot of disparate observations that had been rattling around in our heads suddenly fuse together into a pattern that makes sense.

In this and future columns I would like to share with you my favorite, “aha!” models, what I know of their history, and how I’ve used them.

### Model 1: Factors in Job Performance

The model I chose for this column is one I (and perhaps others) call “The Nine Performance Factors.” It has evolved from Tom Gilbert’s Behavior Engineering Model, published in 1978, which contained six of the factors in slightly different words.<sup>1</sup> The genius of Gilbert’s insight was that it gave us an organized way of thinking about what goes into job performance—the internal and external factors that can either support or impede people from doing their best work. Various others since Gilbert have tinkered

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<sup>1</sup> Gilbert, T.F. (1978). *Human competence: engineering worthy performance*. New York: McGraw-Hill, 73-105.

with his model.<sup>2</sup> And, as you will see, so have I.

My first acquaintance with Gilbert’s model was at a 1994 meeting of the International Society for Performance Improvement (ISPI). It was “aha!” at first sight.

I had been working in PD for quite a few years at that point and, perhaps like you, was vaguely aware that my real mission was not to fill seats at training sessions but to help people do their jobs as well as possible. And the developmental programs for which I was responsible did not seem to be the only way, or even always the best way, to help because I could see that sometimes performance was being held back by problems on the job—poor supervision, insufficient time or information, etc.—that my programs could not solve.

So I took Gilbert’s model and used it to help me (1) think about which of those problems I could address and what to do about them, and (2) communicate and work with others who could address the problems I couldn’t.

What ultimately came out of several years of sharing versions of the model with ISPI colleagues and working with, revising, and expanding it was the following schematic of the innards of the “black box” that produces job performance:<sup>3</sup>

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<sup>2</sup> See, for example, Binder, C. (1998), “The Six Boxes™: A Descendent of Gilbert’s Behavior Engineering Model.” *Performance Improvement*, 37 (6), 48-52. Chevalier, R. (2003). “Updating the Behavior Engineering Model.” *Performance Improvement*, 42 (5), 8-14.

<sup>3</sup> The two right-hand columns in the grid are adapted from Gilbert’s model. (His terms for “Worker” and “Workplace,” for example, were *Behavior* and *Environment*, respectively.) The left-hand column is added. And the terms *Work*, *Worker*, and *Workplace* were coined by ISPI colleagues.

## The Nine Performance Factors

Work	Worker	Workplace
<b>Load.</b> The amount of work to be performed.	<b>Capacity.</b> The mental, emotional, and physical capabilities the worker brings to the job.	<b>Resources.</b> The systems, tools, staff, time, funds, and other resources available to support the work.
<b>Level.</b> The difficulty and/or complexity of the work to be performed.	<b>Competence.</b> The worker's level of knowledge, understanding, and skill.	<b>Information.</b> The data, guidance, and feedback available to the worker.
<b>Meaning.</b> The purpose and results of the work.	<b>Motivation.</b> The worker's attitudes, values, and commitment to the work and the organization.	<b>Incentives.</b> The rewards, penalties, and other consequences experienced or expected by the worker.

The three columns in the model correspond to the three centers of influence on performance: the work itself, the person doing the work, and the environment within which the work is being done.

The three rows represent the three levels on which we think about work: The first row is the practical level (work load, worker capacity, and workplace resources). Second is the intellectual level (work difficulty, worker competence, and workplace information). And third is the level of emotion and values (meaning of the work, worker motivation, and workplace incentives).

The typical PD function is focused primarily on the middle box in the grid—worker competence—and does a good job of

improving it. But the other eight factors have just as much impact and must be attended to if we are serious about quality of performance. We unfortunately have a tendency to turn to training (*i.e.*, to assuming a deficit of competence) as the solution to every performance problem. Sometimes that's a polite way of blaming the victim while letting the organization off the hook.

The real world, of course, is messier than the model; the issues don't necessarily fit so neatly into categories. But I always found this model a good reminder of the kinds of things I needed to address if my programs were to have a real impact on job performance.

— Gaye Mara

### Classic Quote:

“Any fool can make something complicated. It takes a genius to make it simple.”

— Woody Guthrie

# Reverse Mentoring on Social Media

The Hartford conducted a reverse mentoring project (juniors coaching seniors) on using social media that would translate well to the law office setting. The Sloan Center on Aging & Work at Boston College learned about the project and posted a report about it on BC's web site.<sup>4</sup>

The report contains sample documents and describes the project; how the company designed, conducted, and fine-tuned it; and the learning and other benefits that came out of it. We summarize the highlights below and recommend downloading the full report if they interest you.

## How the project began

The birth of the project was pure serendipity. The Hartford's executives had started discussing three concerns:

- First, to reach new customers, they needed to use social media "to get ahead of conversations already well under way across the Internet about insurance and financial products." But their understanding of social media was too limited to proceed on their own.
- They also wanted to be able to satisfy the needs of the growing cohort of Millennials (born from the early 1980s to the early 2000s) in their workforce. They saw electronic communication technologies as an important key to meeting Millennials' desires for greater workplace flexibility and for better accommodation of dual-career households.

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<sup>4</sup> DeAngelis, K.L., (2013) *Reverse mentoring at The Hartford: cross-generational transfer of knowledge about social media*. Chestnut Hill, MA: Sloan Center on Aging & Work, Boston College. Downloadable at [http://www.bc.edu/content/dam/files/research\\_sites/agingandwork/pdf/publications/hartford.pdf](http://www.bc.edu/content/dam/files/research_sites/agingandwork/pdf/publications/hartford.pdf) (last accessed October 10, 2013).

- Finally, recent slippage in the company's bottom line further encouraged them to consider some new approaches.

At the same time, a small group of company Millennials who were passionate about technology in general and social media in particular had begun holding informal technology roundtables in the company cafeteria after work, exchanging ideas about how technology could help them on the job. "They were ... frustrated that The Hartford was not keeping up" and "[e]ventually ... decided to broach the subject with The Hartford's leadership."

And "[o]nce the two groups came together, an obvious strategy emerged: the young, technologically savvy staff would share their knowledge of social media with The Hartford's senior staff."

## How the project was designed and implemented

Executives at The Hartford had been favorably impressed by the reverse mentoring programs innovated by Jack Welch at GE, and they saw social media as the perfect subject for such a program. The company assembled a "core team" of junior and senior people who then:

- Defined the goals of the program;
- Established recruiting criteria, a selection process, and guidelines for mentors;
- Set up a master schedule for project completion (in two waves, with a pause after the first wave to evaluate and make any needed adjustments before the second); and
- Guided the technology support for the project, including
  - advance posting of meetings and deadlines to individual calendars and

- a SharePoint site for information resources, interim communications between meetings, and activity tracking (the latter generated some friendly competition among the mentoring pairs).

The mentees were The Hartford’s Chairman, President, and CEO—who doubled as a powerful champion for the project—and the leaders of various business units in the company.

The mentors were chosen based on:

- Having “strong technical and communication skills”
- Being “early in their careers, top performers in their positions, and at ease with social media”
- Being “trustworthy and [having] a reputation for keeping information confidential”
- Being able to “give the project several hours a month during their regular work schedules”
- Being “multiple levels below their assigned mentees in the corporate hierarchy and in a different line of business or function,” so as to avoid conflicts of interest

In matching mentors with mentees, the core team looked for shared personal interests that would facilitate rapport.

## Results of the project

The project was a win-win-win—for the mentees, the mentors, and the company.

The executive mentees learned how the technology could be used to promote their particular lines of business and also “got to know representatives of a new generation of customers.”

The mentors got “the chance to make a difference” at the company and “to have direct, working relationships with people in the company’s top echelons.” They also “acquired some fundamental training in professional comportment” based on the guidelines they had been given (the guidelines are excerpted in the report). And they “benefited from a significant amount of exposure, sponsorship, and stretch development” during the project: 11 of the 12 mentors in the first wave were promoted within a year.

For the company, the discussions during the project ultimately led to two patents being filed. Some internal policy and operational improvements also came out of the project:

- Updating of the company’s Electronic Usage policy to support employees’ use of social media on the job
- Fewer, more productive meetings and more online collaboration
- Ideas for new reverse mentoring topics such as diversity and sustainability that were expected to produce a “Wave III” project

But perhaps the most valuable benefits were the intangible ones: the cross-generational relationships that have continued beyond the end of the project and that have strengthened morale, loyalty, and mutual understanding across the company.

— Gaye Mara



**Editor's Note:** This column highlights best practices and new approaches to common challenges of in-house training managers. We invite your comments and your suggestions for future articles. You can reach us at (302) 249-6229 or [maraeg@profdev.com](mailto:maraeg@profdev.com).

### Hitting the Bull's Eye with Training

A common problem in developing a training session is limiting the content to what will be genuinely valuable to the participants.

Some lawyers and other subject matter experts (hereinafter "SMEs") with deep knowledge of their fields want to convey all of it, no matter the limits on time, interest, or relevance to the participants' needs. If these SMEs are the ones delivering the content and we don't rein them in, we'll end up with frustration all around as both presenter and attendees lose patience with each other.

I've seen presenters egregiously violate time limits, sometimes at the expense of fellow presenters. When they honor the time limit, their strategy is then to go *really-really-really fast* to get it all in, leaving the participants choking on their exhaust.

A nice tool for narrowing training content was recently served up to me by a co-participant in an ASTD webinar. The subject was "Working Successfully with SMEs."<sup>5</sup> We had just reached the issue of what I call Information Dump Disorder ("IDD"), and a comment popped up in the chat pane that inspired immediate positive responses from the rest of us.

That creative instructional designer uses a bull's-eye poster in working with SMEs. The center circle is labeled "Must Know," the next circle "Good to Know," and the outermost circle "Nice to Know." As or after the training content is generated, they assign it together to one of the three circles.

One thing I especially like about the bull's-eye approach is how small that center circle is, which intuitively suggests a limit on what can be included there. That limit can be made explicit with a limit on the time allotted, the number of slides or points to be covered, etc. ("We have X amount of time for this session, and within that time about Y major points can be covered effectively.")

Another thing I like about it is that, for the items that end up in the outer rings, we can open up consideration of how they might be conveyed outside the group session, such as in further readings or follow-up online discussions. This will help the IDD sufferers let go; they really do want to give people everything, and it will reassure them that there will indeed be access to all of it in some form.

And, if we ourselves are the ones who suffer from IDD, the bull's eye can help us, too.

— Gaye Mara

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<sup>5</sup> Chuck Hodell, *Working Successfully with SMEs: The Dos and Don'ts*. October 3, 2013 webcast from the American Society for Training & Development. (Archived at [www.astd.org](http://www.astd.org) and free to members.)

# Professional Developments

## News and Press Clips

### Career Transition

Scott A. Westfahl, former PD Director at Goodwin Procter LLP, is the new Director of Executive Education at Harvard Law School. He is a 1988 graduate of HLS. While still at Goodwin Procter, Scott co-taught HLS's new Problem Solving Workshop for first-year students with Professor David Wilkins.

Scott has made significant, original contributions to our field. Just a few of them: At Goodwin he developed iStaff, an assignment system and database linking attorney assignments with developmental goals. He chaired the Professional Development Consortium for two years. He wrote *You Get What You Measure: Lawyer Development Frameworks & Effective Performance Evaluations* (NALP, 2008) (reviewed in our May 2009 issue).

An HLS press release announces Scott's appointment and accomplishments:  
[http://www.law.harvard.edu/news/2013/08/14\\_scott-westfahl-will-lead-exec-ed-at-hls.html](http://www.law.harvard.edu/news/2013/08/14_scott-westfahl-will-lead-exec-ed-at-hls.html) - !

### Law School Innovations

*preLaw* magazine's Back to School 2013 issue profiles its selection of the "25 most innovative ideas" that law schools have implemented in the past year. Most of them "are designed to bring practical training into the curriculum." The five categories of innovation recognized in the article are

- *Experiential opportunities and clinics* (6 new programs),
- *Classes* (9 new courses, all including a skill-building and/or experiential component),
- *Orientation programs* (2 new programs to facilitate the transition to law school),

- *Off site campuses* (3 new locations to expand student opportunities), and
- *Initiatives* (a 5-item grab bag of new programs, positions, and online offerings that don't fit into the other categories).

Online (may require registration) at [http://www.nxtbook.com/nxtbooks/cypress/prelaw\\_2013backtoschool/](http://www.nxtbook.com/nxtbooks/cypress/prelaw_2013backtoschool/) - /30

### Visualizing Data

This issue's lead article reproduces a "wordle" created at PDC's 2013 summer conference (see above, p. 4). Turns out there's a YouTube tutorial on creating wordles—as well as tutorials on creating other types of infographics that may be more useful to lawyers in presenting an argument, a client pitch, or a CLE course. Patricia Kutza of *Law Technology News* has written about them as part of a useful series of articles on YouTube tutorials and other easily accessible Web-based resources for technology training; check out the rest while you're looking up this one.

Kutza, P., "The Wow Factor: YouTube Helps Lawyers Create Infographics." *Law Technology News*, September 30, 2013.  
<http://www.law.com/jsp/lawtechnologynews/PubArticleLTN.jsp?id=1202621374225>

### Blogging About Learning and Intelligence

Annie Murphy Paul writes The Brilliant Blog to share research findings about how people learn and get smarter. Paul is a free-lance writer whose work has been published in *Time*, *The New York Times*, and *Slate*. Her subject matter is relevant, and her writing is terrific. And her site links to her excellent published articles, which include "Can You Learn Everything 'On the Job?'" and "The Power of Smart Listening."  
<http://anniemurphypaul.com>

## Conferences

### Legal Profession:

- 12/5-6/13, Toronto, ON. *NALP End of Year Canadian Section Meeting/Diversity Conference*. Association for Legal Career Professionals, <http://www.nalp.org/events>.
- 12/11/13, Washington, DC. *2013 PDC Winter Meeting*. Professional Development Consortium, <http://www.pdclegal.org>.
- 12/12-13/13, Washington, DC. *2013 Professional Development Institute*. Association for Legal Career Professionals, <http://www.nalp.org/events>.
- 1/18-21/14, Austin, TX. *ACLEA's 50<sup>th</sup> Mid-Year Meeting*. Association for Continuing Legal Education, <http://www.aclea.org>
- 2/6-8/14, Chicago, IL. *ABA Law Practice Division Midyear Meeting*. American Bar Association, [http://www.americanbar.org/groups/law\\_practice/events\\_cle.html](http://www.americanbar.org/groups/law_practice/events_cle.html)
- 2/20-22/14, Long Beach, CA. *2014 Newer Professionals' Forum*. Association for Legal Career Professionals, <http://www.nalp.org/events>.
- 3/27-29/14, Chicago, IL. *ABA TechShow*. ABA Law Practice Management Section, <http://www.techshow.com>
- 4/9-12/14, Seattle, WA. *2014 Annual Education Conference*. Association for Legal Career Professionals, <http://www.nalp.org/events>.
- 4/30- 5/3/14, St. Louis, MO. *ABA Law Practice Division Spring Meeting*. American Bar Association, [http://www.americanbar.org/groups/law\\_practice/events\\_cle.html](http://www.americanbar.org/groups/law_practice/events_cle.html)

### General Audience:

- 11/3-6/13, Orlando, FL. *Elliott Masie's Learning 2013*. The MASIE Center, <http://masie.com>
- 11/12-13/13, Austin, TX. *ASTD Learn Now! Integrating Informal, Social, and Mobile into Your Learning Strategy*. American Society for Training & Development, <http://www.astd.org/Events/LearnNow>
- 12/4-5/13, Atlanta, GA. *Telling Ain't Training*. American Society for Training & Development, <http://www.astd.org/Events/Telling-Aint-Training>.
- 1/22-24/14, Las Vegas, NV. *ASTD 2014 TechKnowledge*. American Society for Training & Development, <http://www.astd.org/Events/Techknowledge-Conference>.
- 2/20-21/14, San Diego, CA. *Telling Ain't Training*. American Society for Training & Development, <http://www.astd.org/Events/Telling-Aint-Training>.

- 3/26-27/14, Nashville, TN. *Telling Ain't Training*. American Society for Training & Development, <http://www.astd.org/Events/Telling-Aint-Training>.
- 4/11-16/14, Indianapolis, IN. *THE Performance Improvement Conference 2014*. International Society for Performance Improvement, <http://www.ispi.org/content.aspx?id=86>
- 5/4-7/14, Washington, DC. *ASTD International Conference & Exposition*. American Society for Training & Development, <http://www.astdconference.org>.

## Courses and Certificate Programs

### American Management Association,

<http://www.amacourses.com>. AMA offers an extensive selection of online, on-site, and in-house courses in 23 subject areas, including:

- Business Analysis
- Communication Skills
- Human Resource Management
- Interpersonal Skills
- Leadership
- Management and Supervisory Skills
- Myers-Briggs Type Indicator® (MBTI®) Certification
- Presentation Skills
- Project Management
- Strategic Planning
- Thinking and Innovation
- Time Management
- Training and Development.

### American Society for Training & Development, Certificate Programs,

<http://www.astd.org> (see the website for online and/or on-site dates and locations for each topic):

*CPLP Certification: Certified Professional in Learning & Performance*

This is a comprehensive program consisting of approximately 10 weeks of coursework, a knowledge-based examination, and submission of a qualifying work product. It addresses the nine areas of expertise identified in the ASTD Competency Model for workplace learning & performance professionals:

- Designing Learning
- Delivering Training
- Improving Human Performance
- Measuring and Evaluating Learning
- Facilitating Organizational Change
- Coaching
- Career Planning and Talent Management
- Managing the Learning Function
- Managing Organizational Knowledge

<http://www.astd.org/Certification>

#### *ASTD Master Trainer Certificate Program*

A three-part blended learning program intended to develop mastery of all aspects of training delivery, consisting of an initial online orientation, a 4-day in-person workshop with practice and feedback, and an elective online course.

<http://www.ASTDMasterTrainer.org>.

*Other ASTD courses and certificate programs are offered in the following subject areas, online or face-to-face:*

- Business Partnering
- Delivering Training
- Designing Learning
- E-Learning/Online Learning
- Human Performance Improvement
- Management and Leadership Development
- Measuring and Evaluating Learning
- New Approaches to Learning
- Organizational Development
- Presentation and Facilitation Skills
- Project Management
- Sales Enablement

<http://www.astd.org/Education.aspx>

#### **Cornell University Human Capital Development Program.** <http://www.ilr.cornell.edu/hcd/>

- Cornell's ILR School offers 1- to 3-day workshops, which may be taken individually or in a certificate series, in the following subject areas:

#### Diversity and Inclusion

- Equal Employment Opportunity
- Human Resources
- Labor Relations
- Legal and Internal Investigations
- Management Development

Workshops may be attended at the New York City facility or delivered at your site. The School also offers a calendar of online courses, which again may be taken individually or in a certificate series.

<http://www.ecornell.com/individual-course-list/human-resources-management-courses/fam/hr>

#### **George Mason University Leadership Coaching for Organizational Performance Certificate Program,**

Fairfax, VA. A one-semester program certified by the International Coach Federation and consisting of 5 in-person course modules of 2-3 days each approximately once a month, supplemented by distance learning and independent work between modules. It includes:

- Course Module I, Leadership Coaching Foundation
- Course Module II, Creating Awareness
- Course Module III, Coaching Skills
- Course Module IV, Coaching Skills in Action
- Course Module V, The Process and Business of Coaching

[http://www.ocpe.gmu.edu/programs/org\\_dev/leadership\\_coaching.php](http://www.ocpe.gmu.edu/programs/org_dev/leadership_coaching.php).

#### **Harvard Law School Program on Negotiation,**

Cambridge, MA. All courses held in Cambridge.

<http://www.pon.harvard.edu>.

Spring 2014 Executive Education Seminars:

- 1-day courses:  
4/10/14. *The Odd Couple: Capturing the Power of Reason and Emotion in Your Negotiations*  
5/22/14. *Practical Lessons from the Great Negotiators*  
6/19/14. *Women and Career Negotiations*

- 3-day course:  
4/7-9/14. *Negotiation and Leadership: Dealing with Difficult People and Problems*. (Repeated 5/19-21 and 6/16-18)

Harvard Negotiation Institute: 5-day courses held during June 2-6 and 9-13, 2014:

- *Negotiation Workshop: Strategies, Tools, and Skills for Success*
- *Mediating Disputes*
- *Negotiation Workshop: Improving Your Negotiating Effectiveness*
- *Intensive Negotiations for Lawyers and Executives*
- *Dealing with Difficult Conversations*
- *Deal Set-Up, Design, and Implementation*

### **Ithaca College Online Professional Development and Certificate Programs,**

<http://www.ithaca.edu/gps/professional/devcert/>. Two-week online sessions in:

- Performance Improvement Management
- Strategic Communication Management
- Sustainability Leadership

### **NALP/ALI-CLE Online Programs for PD**

**Professionals** (archived video webcasts, available at <http://www.ali-cle.org>):

- Coaching Your Lawyers in Business Development
- Leadership in Practice: How Law Firms Can Help Partners Develop Leadership Skills
- Leaving Lockstep: Moving Toward Competency-Based Compensation
- LPM Update: Lessons Learned in Implementing Legal Project Management
- Meeting the Challenges of Lateral Integration
- Partners in Transition: Best Practices for Recruiting, Integrating, and Retaining Lateral Partners
- Professional Development 101-102
- Strategic Outplacement for Associates and Partners

**Note:** These courses are not easy to find on the ALI-CLE site. What worked for us was putting the course title in the "Search" box on the home page.

### **Training Live+Online Certificate Programs.**

<http://www.TrainingLiveAndOnline.com>. Online courses; check the web site for dates:

- *Advanced Articulate Storyline for eLearning*
- *Creating Engaging eLearning with Articulate Storyline*
- *Designing eLearning with Captivate*
- *Developing Short and Instant Learning*
- *Instructional Design*
- *Leading Effective Live Online Events*
- *Project Management for Learning Professionals*
- *Producing Great Podcasts*
- *Social Media for Trainers*
- *Training Coordinator Certificate*
- *Training Manager Certificate*

## **Degree Programs**

### **George Washington University/Hildebrandt Institute Master of Professional Studies and Graduate Certificate in Law Firm Management.**

The Master's curriculum is a two-year, 30-credit, blended learning program consisting of two 12-credit segments (Law Firm Management and Law Firm Leadership), and a 6-credit Independent Research Project. Each 12-credit segment begins and ends with an on-campus residency period in Alexandria, VA, with 4 months of online distance learning in between. The 12-credit segment in Law Firm Management may stand alone as a Graduate Certificate.

<http://nearyou.gwu.edu/sfm/index1.html>. (See article about this program in our February 2011 issue.)

### **University of Pennsylvania Executive Education for Chief Learning Officers.**

Penn's Wharton School and Graduate School of Education, in consultation with the training industry, teamed in 2006 to create an executive education program for Chief Learning Officers. In December 2010 the program was retitled *PennCLO* and draws faculty

from across the University. The program “meets for two separate weeks each semester, allowing students to continue working while they study” and offers “a blend of on-site classes, distance learning, and ‘field’-based projects” in six course blocks:

1. Strategic Leadership
2. Workplace Learning
3. Business Acumen
4. Evidence-Based Decision Making
5. Technology for Work-Based Learning
6. Dissertation (for EdD candidates)

Students in the program may pursue a master’s or doctoral degree from Penn’s Graduate School of Education. Application deadline for the Summer 2014 Cohort is February 1, 2014.

<http://pennclo.com>

**Saint Joseph’s College Online—Master of Science in Education: Adult Education & Training Concentration.** 33 credits

“Learners choose a major project in adult education or human resource training that is useful in their workplace.

This master’s degree concentration project evolves through a succession of courses in this program based on the students’ personal interests and needs at their workplace in consultation with their faculty mentors.”

<http://online.sjcme.edu/adult-education-and-training-concentration.php>

**Villanova University Master of Science in Human Resource Development.** A two-year online master’s program, offering courses in:

- Introduction to Human Resources
- Organizational Change Management
- Human Resource Metrics and Statistical Research
- Human Resource Technology Solutions
- Compensation and Benefits
- Employment Law
- Organizational Training
- Financial Management for Profit
- Workforce Planning

<http://www.villanovau.com/hr-masters-degree/>

