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Can Lawyers Have It All? Who Makes Partner AND Thrives in a Big Law Environment?

Heather Bock, Lori Berman, and Juliet Aiken

You have a lot of associates in your firm. Some will make it to partner. Some will make it to partner but dread their jobs and have dreams of becoming history professors (if not for the drastic pay cut). Some will love their jobs and get promoted with ease but spend way too much time coughing and sneezing in their offices. Who are the lucky ones that succeed in mind, body, and promotion? And is it luck or skill? Our research says it might be their mindset.

Traditionally, promotion to partner has been considered the Holy Grail for success as a law firm lawyer. We conducted research that took a more holistic approach to measuring law firm success. In addition to considering promotion, we studied lawyers' self-perceptions of flourishing in their careers (that is, feeling they are developing professionally and are satisfied in their jobs and careers) and reports of general physical health (that is, the frequency of minor ailments). To do this, we surveyed over 250 lawyers from various Am Law 200 firms (a sampling of lawyers from 75 different firms was invited to participate).

When trying to predict who will succeed in large law firms, prior academic success—GPA, for example, or law school attended—is traditionally the main indicator considered. More recently, the behaviors that lead to high performance, often called competencies, have received attention. Our research takes an additional step toward understanding who is successful; we not only looked at how successful lawyers tackle their own work and how they work with others, but we also analyzed how

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successful lawyers mentally approach their work. Our results were occasionally surprising and sometimes raised as many questions as they answered.

A complete overview of our findings would be challenging to provide in this space. The mindset and behaviors that characterize healthy attorneys are not always the same as the mindset and behaviors that characterize flourishing attorneys or attorneys who make partner in a timely manner. However, there are a few characteristics that underlie all three of these measures of success: health, flourishing, and promotion to partner. Those characteristics—which we will discuss in this article—describe attorneys who are “masters of their fate.”

What does it take to be the master of your fate? We found that healthy, flourishing partners shared two characteristics and behaviors in common: feeling in control and strategic career development.

When thrown into a tough situation, how much control do you feel you have over it? Can you make lemonade out of those lemons, or will you just complain about their

bitter taste? Lawyers who successfully traversed the partnership track, felt as if they were flourishing, and stayed healthy were more likely to set up lemonade stands; they were likely to say that they felt in control of what happens to them. As an example, 71% of partners said they felt in control of what happens to them, compared to only 57% of lawyers who were over 10 years in practice but still had not made partner. Additionally, these successful lawyers were more likely to say that they were in control of the surrounding environment, so they are not just in control of what happens to themselves but also have an impact on what happens to others. Being proactive—understanding that they have the central role to play in their own lives—helped these lawyers find success at greater rates than those who were passive in life.

These lawyers also said that they strategically developed their careers. They seized opportunities other lawyers may not have seen and deliberately invested in relationships that they believed were good for their career. Successful lawyers therefore not only feel in control of their lives but also have an eye on the horizon and do what they can today to position themselves for success tomorrow.

Together, the attributes that characterize healthy, flourishing partners depict lawyers who drive their own fates, proactively develop their careers, and deliberately position themselves to take advantage of the relationships and opportunities that their firms offer. In short, we found that how attorneys think about their environment—in addition to the so-called soft skills—really matters.

While this all sounds logical for flourishing at work and getting promoted to partner, we were surprised to find that the same variables correlate with whether an attorney gets colds and headaches! Those who believe they have more control of their environment are actually healthier! In the challenging law firm environment, proactivity may help you

carve out not only time for your career but also the time you need to take care of your health.

Naturally, this raises the question: How do we help lawyers cultivate this “master of fate” mindset? Most training offered in law schools and law firms focuses on developing skills, not a mindset. However, there is cognitive psychology research suggesting that people can change their mindset; but it takes understanding how they think now, realizing the implications of that thinking, and spending a lot of time practicing new behaviors and ways of thinking. Not easy work!

We have been incorporating tools for mindset change into leadership programs we deliver at both Georgetown Law Center and Hogan Lovells. Below are some strategies we have found useful.

1. Encourage self-awareness and self-reflection

Reflection is critical for development. You cannot be master of your fate if you don't know who the master is. That is, a lawyer cannot change her mindset if she does not know how she mentally approaches her work and relationships. Encouraging reflection—holding a theoretical mirror up to yourself and understanding how you think, as well as why you think a certain way—can take several different forms. We'll talk about two—the use of assessments and the use of prompts to guide reflection.

Assessments—questionnaires that evaluate someone's behaviors or characteristics—are useful tools for encouraging self-reflection. Not only do assessments allow you to figure out who you are, but they also encourage you to think about others' mindsets and approach to work.

For example, the Hogan Development Survey—a personality tool developed by psychologists and used globally—helps participants understand how they behave

under stress and the impact that can have on relationship building. Do you become aggressive and push against people with too much control? Do you become compliant and lose control?

As another example, multi-rater assessments help you to understand how others see you. Are you approachable and affiliative, and do you build connectivity with the team? Or do you focus on the task to the detriment of relationships? Do you reward more junior attorneys for taking control and being innovative, or do you take away their autonomy (and some of their ability to be “masters of their fate”)?

Behavioral prompts pose questions that encourage self-reflection. For example, a prompt might ask you to think about three times in the past when you gave up doing something because something unexpected happened to derail your plans or goals. Questions about these events may ask you to think about how it felt, what the situations had in common, how you reacted, the result of your reaction, and so forth. Behavioral prompts such as these allow people to look into patterns in their past behavior and see what those patterns reveal about who they are and what makes them tick.

2. Make learning active

It is well established that skills training requires active learning. Lectures alone will not transform attorneys into outstanding lawyers, leaders, and business generators. Active learning can be encouraged both through individual and group activities. For example, journaling—an individual activity—allows people to find patterns in their behaviors and thoughts as they happen, correct negative thinking tendencies, and even figure out what pushes their buttons—and why!

Common group activities include critiquing case studies. Case studies are deep dives into a particular organization, firm, or event that detail the context, primary agents,

process, and results. Participants critiquing case studies have the opportunity to discuss and explore what actions enable positive outcomes, and when. It's easier to be master of your own fate if you have behavioral tools to help you take control. Another group activity is role-play. In role-play, participants are assigned parts and are asked to act out their part, given information about their "character." For example, negotiation skills are often taught through role-played negotiations.

While role-playing can be a useful way to try out new skills, we prefer to use simulations whenever possible. Simulations are immersive. In a law firm environment, they may involve a legal case or a team decision-making situation. In simulations, participants don't "play a role." Instead, they are asked just to be themselves and advocate for their position. For example, participants may take roles as outside or in-house counsel working together to resolve how to approach a case.

Simulations that include coach observers who facilitate feedback sessions to help participants understand their contribution and impact on others enable participants to see how they work and collaborate in real time. This helps them understand how to be proactive in controlling the impact they make on others and relationships.

3. Extend the learning

Finally, training programs should enable attorneys to continue applying their new skills in their day-to-day work. Often, unfortunately, new skills and ways of looking at work fade over time after the conclusion of a program. Tools such as journaling, action planning, and peer learning groups that extend beyond the classroom experience can be used to move learning forward after a program has concluded. Another excellent extension tool is coaching. Working one-on-one with a professional coach can enable you to apply your new skills in your day-to-day

work. We've found that coaches can challenge you in a way that you probably won't challenge yourself and give you critical feedback that others are hesitant to give you back at the office.

When seeking out or designing training programs, consider how the program engages the learner to hold a mirror to himself to first enhance awareness of his own mindset and then to consider how that mindset helps or hinders success. And, maybe, think a little more broadly about what success for your lawyers really means. Sure, we want associates to get promoted to partner, but more and more we know partnership is not the end all and be all of what today's associates want or need. They also want and need to be mentally and physically healthy; and we want them to flourish. That may just be more likely if they are masters of their own fate.



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Quote of the Quarter:

Computer scientists, engineers, entrepreneurs, academics—they are a self-selected group of individuals who have schooled themselves in a fast-changing field for which there is no settled syllabus, no well-established curriculum. In turn, their preferences and proclivities have shaped the educational technologies that the rest of us use, as well as the expectations we hold about what ed tech can and should do.

.... [T]here's no reason the rest of us can't cultivate the autodidact's virtues of persistence and passion. By the same token, the autodidacts who create and promote the educational technology used by the rest of us could keep in mind that the support of people and institutions is always integral to learning.

For most, that will mean the physical presence of teachers, of peers, of classrooms and schools. No human being learns in isolation; education is an inherently social enterprise. Even the autodidact is surrounded by social influences, guided by the voices of parents and past teachers, as he roams library stacks and Internet sites alone.

—Annie Murphy Paul, *The Brilliant Report* E-newsletter, July 23

Lateral Integration for Longevity

Julie M. Mulhern

In law firms, lateral integration is a marriage of many resources. I am sure many remember the famous quote “it takes a village.” In the case of lateral integration, this quote is spot on for law firms in a competitive market. Recruiting, marketing, professional development, and human resources all play a significant role in an effective onboarding program.

Onboarding Laterals

Onboarding the lateral should be a well-thought-out process. Before you bring any laterals through the door for their first day of work, consider discussing your current process and evaluating ways to improve and engage the prospective lateral immediately. Organize a meeting of all principal administrative department heads to discuss the onboarding and orientation process. The purpose of the meeting should be to assign tasks and accomplish as much as possible before each lateral’s first day of work. Discuss everything from file transfers, conflicts, business cards, technology needs, and the orientation schedule. Consider including the secretary assigned to your new lateral to assist the onboarding team. The secretary should be able to identify meetings and client obligations in advance to help minimize conflicting demands in the first week.

Prior to finalizing the orientation schedule, consider inviting the lateral (via a conference call) to help review the schedule and meet the onboarding team. Ask the lateral what she would like to accomplish in the first days on the job. Inviting the lateral to participate in the onboarding process reflects the firm’s regard for the lateral and her work while reaffirming her clients as a top priority.

Another way to determine the lateral’s needs is by conducting a pre-hire survey. Determine the level of her technology experience¹ and plan accordingly for any additional hardware or software needs. All of this information should be utilized to streamline the actual orientation schedule.

Integrating Laterals

Once the orientation phase is complete and the hoopla of joining the firm has settled, the real work begins. Again with the “it takes a village” concept in mind, integrate your partners, associates, and administrators into the lateral’s progress. Consider engaging your associates to act as ambassadors during this period. At Benesch we utilize practice group ambassadors to ensure that laterals are invited to a monthly practice group business lunch. New laterals are introduced at the meeting and learn of practice activity as well as how they can act as an immediate resource. An added bonus: the lateral may also be able to assist with building or increasing prospective client opportunities based on their existing contacts.

Professional Development takes over after the onboarding and orientation process via monthly meetings over the lateral’s first year. These meetings are brief and straightforward to keep from overwhelming an already busy schedule. Use a checklist to steer the conversations, answer questions, and identify additional resources needed by the lateral.

Similarly, Marketing/Business Development meets with the lateral on a regular basis in

¹ See the July 17, 2013 *ABA Journal* post by D. Casey Flaherty, Corporate Counsel of Kia Motors America, “Could you pass this in-house counsel’s tech test?” www.abajournal.com/legalrebels/article/could_you_pass_this_in-house_counsels_tech_test

the first year to develop work profiles, business plans, and conference plans and to identify training and/or coaching opportunities. These monthly conversations reveal what the lateral is discovering about the firm (the good, the bad, or the ugly) and provide an opportunity to discuss his understanding of the firm. These meetings should also be used to watch for red flags. Is the lateral participating in training, and firm events? What are his experiences with work flow, feedback, participation in pitches, and so on?

Additionally, consider peer mentoring for more senior laterals and partners. Mentoring is an effective tool in educating the lateral on firm politics and business protocols.

Helping Laterals Contribute to the Firm

As with any business investment, you must monitor the analytics and look beyond billable hours. Firms should review business/client development activity and expenses, new matter in-take activity, fee collection averages, write-offs, and the like to establish performance expectations for the lateral. If the lateral is bringing a book of business with her, discuss realistic expectations on when those numbers will show up. We found that it takes a lateral approximately three years to be profitable. Knowing this kind of time frame will allow for an honest, fair, and frank discussion about performance metrics and evaluations at the appropriate time. Do not keep laterals in the dark. Walk them through the timeline of these events, forms, and supporting written materials to help them understand your process and procedures.

Last but not least, report all of this information to the leadership of each lateral's practice group. We use a quarterly reporting system that includes commentary, requests, and issues identified during the monthly P.D. meetings. The reports provide department leadership with opportunities to engage the lateral on direct issues. They are also valuable in spotting potential issues and avoiding frustration for all involved.

The process we have created at Benesch allows us to engage our laterals in the earliest phase of employment. The process also conveys our commitment to both their success and the success of our firm. We want our laterals not only to understand but also to participate in "My Benesch, My Team"!



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Managing as an Introvert in an Extrovert World

Dottie Palazzo

Several years ago the Director of Administration at my firm conducted a two-day retreat for his senior managers. Included on that agenda was a session by Larry Richard, at that time a Ph.D. candidate certified to administer the Myers-Briggs Type Indicator (MBTI) and now Dr. Larry Richard. The MBTI is an instrument used to measure personality styles based on psychologist Carl Jung's theory of personality.

We each did the test, which was scored by Larry Richard. After discussion, we were asked to line up numerically based on our personality type scores on each side of the room, Introverts on one side of the room and Extroverts on the other side. When I looked across the room from my extreme Introvert position there was my "arch enemy" at the extreme Extrovert position. Same was true for the other three MBTI measures. That arch enemy was a colleague who had recently transferred into my working team and who I was convinced was out to get my job.

In 1921 Carl Jung published *Psychological Types*, in which he identified Introvert and Extrovert (the MBTI spells it "Extravert") as "Central Building Blocks" of personality. Introverts prefer the inner world of thoughts and feelings, needing to retreat to solitude to recharge their batteries. Extroverts are drawn to an external life of people and activities and are not comfortable in solitude. Introverts listen more than they talk and think before they speak. Extroverts think out loud, prefer talking to listening and are never at a loss for words. Introverts have social skills and enjoy parties and meetings, but after a while they wish they were at home drinking tea and reading a book.

They also work differently. Extroverts jump into assignments quickly and make fast decisions. Introverts work more slowly and

deliberately with impressive powers of concentration. When they finally make a decision, it is deliberate and well thought out.

I realized that day that my colleague wasn't my arch enemy. We just thought differently, worked differently, and saw the world differently. I was probably driving her as crazy as she was driving me.

One of the resources for this article is a book, *Quiet: the Power of Introverts in a World That Can't Stop Talking*, by Susan Cain. I read it in conjunction with a six-hour Case Western Reserve University (CWRU) Siegal LifeLong Learning discussion group led by Barbara Parr, a retired high school literature teacher. I recommend that you each read that book as it is full of valuable and interesting information. In addition to discussing the frustrations Introverts often feel in our extroverted society and offering ways to overcome these, *Quiet* provides an interesting background on how the U.S. came to value extroversion above introversion. Here is a quick overview before I move on.

In *Quiet* Susan Cain gives information on how the U.S. developed a "Culture of Personality." When the country was an agricultural society, it had a "Culture of Character." The ideal self was serious, disciplined, and honorable. When the country became an industrial society and people moved from farms into the cities, they moved from farming to jobs selling products. Their new "Culture of Personality" required people to be able to sell themselves as well as their products.

During this time, Dale Carnegie, son of a Missouri pig farmer, observed that college students who entered and won speaking contests were considered leaders and

excelled in business. In 1913 he published his book, *Public Speaking and Influencing Men in Business*, and began teaching public speaking. From there we have just raced on to what Susan Cain calls the Extrovert Ideal, under which talkative people are considered smarter, better looking, and more interesting. Introversion is considered a second-class personality trait. Despite the fact that one-third to one-half of Americans are Introverts, the U.S. is among the most extroverted nations in the world.

Challenges and Coping Strategies for Introverts

My original reason for writing this article was to examine situations where my Introvert personality type conflicted with the “Extrovert Ideal.” Here is a list of those situations I found most challenging in the work setting, followed by the strategies I devised or read about to ease the conflict:

- Brainstorming Sessions;
- Group Discussions, both professional and social;
- Leading Meetings;
- Standing Up to Talkers;
- Asserting Yourself or “Tooting Your Own Horn”;
- Playing the Game, *i.e.*, Organizational Politics; and
- Flexing to Extrovert but Maintaining Your Sanity.

Brainstorming Sessions: As a senior manager I was often called into an *ad hoc* committee to discuss and brainstorm a solution to a problem that had nothing to do with my job. So I would go into the meeting with no prior information or experience to draw on. As an Introvert I needed to get information and retreat to my office to think about it before I had any wisdom to impart. Needless to say I sat quietly and listened as others talked. Invariably the discussion leader, my boss, would say, “Dottie, you have been pretty quiet. What are your ideas?” If I had a

thought, it flew out of my head and I just wanted to dive under the table. (Frankly, I would never have admitted this if not for the fact that all members at the CWRU discussion group repeatedly admitted this exact reaction when discussing situations in which they didn’t fit. So, if you are thinking “That never happens to me,” you are probably not an Introvert.)

Eventually I was no longer invited to those meetings. Which was a relief. I didn’t want to be there anyway. But it was also a disaster because it signaled that I was no longer “in the loop.” How could I have avoided that situation?

- I should have taken some time to research the topic identified in the invitation;
- I could have contacted the discussion leader to inquire about the topic;
- I could have asked the discussion leader if he needed help with research on the topic;
- I could have asked questions about comments of other participants;
- I could have expanded on comments already made; and
- I could have offered to take notes and email a summary to all attendees.

In other words I could have prepared for that meeting. Preparation seems to me to be the key to participating in these kinds of events. You may think your workload doesn’t allow you to take that time, but your duty to yourself demands that you take whatever time necessary to prepare. Did I do that? Of course not, but in hindsight my responsibility to the committee required that I take time to be prepared to participate.

Group Discussions: In any group discussion, at work, around the holiday dinner table, or at any gathering of friends, have you noticed that the speaking parts are filled early on and once they are established it is very hard to get a word in? After a while you become invisible. You could leave the table and no one would even notice. One of Mary Ellen

Slyater's "10 Tips to Help Introverts Win at Work" advises that we say something within the first five minutes of the conversation. Anything, even just a recap or affirmation of someone else's comment. Anything to establish yourself as a participant.

Susan Cain's book suggests that you raise your hand, signal "time out," and state that you have something to say. That sounds kind of rude but not as rude as what I have resorted to—just talking over someone else until they stop talking. It gets their attention but not in a good way. If you use either of these methods to get in, you better have something good to say.

Leading Meetings: I attended a dinner of a women's social club of which a friend of mine is president. She mentioned that before she became president another woman was to move up to that position but did not because she claimed she could not lead the organization's meetings. That reminded me that I avoided accepting a president's position for the same reason. This is another challenge that I believe advance preparation makes possible for an Introvert; see my earlier article on that subject (Palazzo 2009).

Standing up to Talkers: One of the comments submitted to the "10 Tips" article came from an Extrovert who reported that, when she is "yamming on," her Introvert colleagues will ask "Is that really your position on that or are you just thinking your position through out loud?" She wrote that she appreciated this reminder that meetings are not necessarily the best place to think out loud. This indicates an open rapport between Introverts and Extroverts. That thought is encouraging.

Asserting Yourself or "Tooting Your Own Horn": Introverts tend to become overwhelmed by highly stimulating environments and may choose to work in behind-the-scenes settings. This doesn't mean their work is unimportant. It merely refers to their work environment preference.

That is what I did. I had a position that grew and grew over time because of changes in the composition of our lawyers; more states adopting continuing legal education requirements both in the U.S. and internationally; and the expanded scope of requirements, such as credit for *pro bono* work, mentoring, and new admittee requirements that are very different from the veteran requirements. The approval of online programs added another level of complexity.

My team and I found ways through "quiet competence," an Introvert quality, to get it all done without asking for help or "tooting our own horn." We were proud, but unfortunately no one—not even our boss—knew all that we were doing.

Lesson learned: Don't fail to brag about yourself and your staff just because it is uncomfortable for an Introvert to do so. Staying in your comfort zone does a disservice to yourself and your staff. I realized that in the succession planning² when my boss said she had no idea of everything we were doing and asked how on earth we could accomplish so much.

Playing the Game—Organizational Politics: Introverts dislike organizational politics. It takes a lot of small talk and socializing to remain in the clique. It takes a lot of meeting attendance and being in the limelight. It can be overwhelming even to an Extrovert. Introverts choose to avoid those activities or may try to participate by email. Or they may just drop out of organizational politics entirely.

But then they find that the position they always dreamed of was created without them knowing about it, and—worse yet—someone else got it. I totally ignored organizational politics, but in this day and age an employee can't afford that luxury. You need to use all the tips and suggestions in this article to

² See "A Practical Guide to Succession Planning for PD Professionals" in the November 2013 *PDQ*, at pages 6-9.

help yourself stay noticed by the powers that be in your firm.

Flexing to Extrovert but Maintaining Your Sanity: This topic is covered by Susan Cain in Chapter 9, “When should you act more Extroverted than you really are?” She tells the story of Professor Brian Little, a former Harvard University psychology lecturer and winner of the 3M Training Fellowship. Professor Little is described as a cross between Robin Williams and Albert Einstein. His students loved him. During his lectures he might sing and twirl around on stage. He had a booming voice and enjoyed his own jokes as much as his audience did. His classes often ended in standing ovations. He was a real life of the party.

But in his private life he lives with his wife on a large piece of land in a remote Canadian wooded area, visited only by his family. He spends his time reading, writing books, and sending email notes he calls “e-pistles” to his friends. At parties he pairs off with close friends in quiet conversation. Professor Little is an Introvert.

The good news is that people are flexible. Introverts can act like Extroverts for work or for people they love. For anything they consider important. “Free Trait Theory” is a term created by Professor Little for his belief that “fixed traits”—personality traits one is born with or culturally endowed with, such as Introversion—can co-exist with “free traits”—that we can and do act out of character for causes we care about. Free Trait Theory explains how an Extrovert lawyer can behave with reserve in her office or how Professor Little, an Introvert, can behave as the life of the party to serve the students he loves. (Cain 208-211). People can flex at will—but not permanently. Introverts must recognize their need to retreat and recharge.

Many leaders engage in pretend-Extroversion. Some of you who have seen me active in ACLEA may not realize that my MBTI scores register me as an extreme

Introvert. For years I acted like an Extrovert for causes I care about, like chairing ACLEA’s in-house special interest group. For me that is best done when I have a job to do. Chair the meeting or host the party. I can prepare for that and follow the script. As my daughter says, when you are playing a part, as an actor, committee chair, or hostess, “you are someone else.” That someone else may be an Extrovert, and so are you for the duration of the script.

Extroverts never tire of stimulation and often follow a busy day of conferencing or training with group dinners or other after-hours activities. Introverts not so much. Never joining the after party makes one appear standoffish and excludes you from the camaraderie. Sometimes you want to or need to join the revelers. Judiciously decide what you can or need to do and plan accordingly. Plan some time to recharge before you join the after party.

Final Thoughts—for Both Introverts and Extroverts

How can you tell which preference applies to you—Introvert or Extrovert? There is a short survey on pages 13-14 of Susan Cain’s *Quiet*. There is also a free 28-question Personality Type Test based on Myers-Briggs and Carl Jung’s teachings at www.CelebrityTypes.com or www.16personalities.com. They take less than 12 minutes. Comments on each of these sites indicate that the results agree with the results of the full Myers-Briggs test.

Some readers of the “10 Tips to Help Introverts Win at Work” complained that the author was asking Introverts to become Extroverts. That is not possible, and it is not what this article is about. This is merely intended to encourage Introverts to find ways to participate and succeed in the Extrovert workplace while still exercising their Introvert preferences.

In my firm's administrative conference, Dr. Richard reported on his research showing that 57% of lawyers are Introverts. That means that more than half of your lawyers are struggling with the same challenges covered in this article.

If you are an Introvert, I hope the information here helps you. And, whether you are an Introvert or an Extrovert, use these tips and strategies to help your lawyers succeed.

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NALP Invites Article Proposals for Future Issues of *PD Quarterly*

Janet Smith, NALP Director of Communications



The next issue of *PD Quarterly* you receive—the November 2014 issue—will be the first issue to be published by NALP. The NALP staff and the advisory group of PD professionals who are overseeing editorial planning for future issues are excited about the opportunity to build upon the strong foundation Gaye Mara has established. But it is clear that the future success of *PD Quarterly* will depend upon the involvement of a broader lawyer PD community.

Whether you are a past contributor to *PD Quarterly* or are an aspiring writer who has not yet contributed to these pages, we invite you to submit one or more proposals for articles for future issues of *PD Quarterly*.

Proposals should be guided by the editorial mission of *PD Quarterly*: *PD Quarterly* offers thoughtful, in-depth explorations of lawyer professional development and talent management topics by PD people for PD people. In every issue, leading experts in lawyer professional development, career development, and talent management present advanced-level content in core areas of lawyer PD—sharing research, best practices, lessons learned, and new developments in the field.

Proposals should include:

- A brief description of the proposed content of the article.
- A brief article outline.
- An estimate of article length. (Note that *PD Quarterly* presents articles that explore topics in depth and should most typically be between 2,000 and 5,000 words in length.)
- Your name, title, and organizational affiliation, and a brief bio of two to four sentences outlining your credentials to write on the topic.

For additional background on the editorial mission of *PD Quarterly*, typical topics, and guidelines for authors whose articles are selected, see <http://www.profdev.com/authors.html>. And please do share this request for article proposals with anyone you think would be interested.

All proposals should be submitted to me at jsmith@nalp.org. The NALP *PD Quarterly* Advisory Group will assist in the review of proposals. Questions? Feel free to contact me at either jsmith@nalp.org or 202-835-2614.

Your Feedback Is Also Invited

As NALP begins publication of *PD Quarterly*, we also invite your feedback. Whether or not you plan to submit an article proposal, we invite your comments on what you value most in *PD Quarterly* and what topics you would most like to see addressed in future issues. And, as you begin to see issues that NALP has published, let us know what you do and don't like. Feedback can be shared at any time with me (jsmith@nalp.org) or with NALP Executive Director James Leipold (jleipold@nalp.org).

August 2014

Dear friends and colleagues,

It has been 20 years since I put together the first issue of the journal that evolved into *PD Quarterly*. My goal was to provide an education and information resource for the lawyer PD community, one that would support our own professional development as well as that of our lawyers.

At the time, lawyers had largely walled themselves off from the expertise of other fields, seeing it as irrelevant. One consequence of that isolation was that legal PD professionals were unnecessarily reinventing the wheel. So, in addition to highlighting successful programs for lawyers, I wanted to publicize proven PD principles and practices from business and academia and show their applicability to the legal setting.

I continued *PDQ* as a part-time venture after closing my consulting practice in 2009, both because I still enjoyed it and because there was nothing in the market to replace it. But, after I turned seventy in 2012, it seemed a good idea to start letting go of the reins. Since there was still no comparable publication available to the lawyer PD community, in 2013 I started looking for someone to continue *PDQ* so that I could retire.

As you know, the result of that quest is that NALP will carry *PDQ* forward beginning with the November 2014 issue. I hope that many of you will respond to NALP's invitation in this issue to contribute articles and to provide suggestions and feedback.

True to the proclivities of my generation, I won't truly retire but will just shift my focus to new adventures. I gained certification as a Master Gardener in Virginia in 2005, and in Delaware in 2012 after moving here. That lets me put my PD skills to work educating the public about best practices of a different kind. There's a new botanic garden breaking ground this fall in southern Delaware, half an hour from my house; I've already signed on as a member and donor and hope to become more involved as a volunteer.

In one's seventies the dominant feelings about one's past career are appreciation and regret: regret for poor decisions and missed opportunities, and appreciation for all the support, friendship, and plain good luck that made any successes possible.

Pre-eminent in the support and friendship categories are those who helped me in thinking through the startup and various stages of evolution of *PDQ*: Jeanne Svihart, Nora Mara, Jill Ramsfield, Katie White, Ellen Callinan, and Heather Edes (all but the first are contributing authors as well). You have my gratitude forever.

Next come the authors whose fine writing and valuable ideas and experiences have graced these pages, some of them generously contributing long before we had enough of a reputation to benefit their own careers. Our very first "guest author," in August 1997, was Sue Manch (then with White Svihart Shannon & Manch and now with Bingham McCutchen);

before that all the writing was done by me. The “repeat” authors to whom I owe special thanks are Dottie Palazzo, Heather Bock, and Lori Berman (all contributing again in this issue), Ida Abbott, Steve Armstrong, Lynn Baronas, Michele Bendekovic, Ellen Callinan, Steve Chitwood, Randy Christison, Heather Edes, Steve Gluckman, Ross Guberman, Jim Lovelace, Sue Manch, Nora Mara, Terri Mottershead, Steve Nelson and Andi Cullins, Jill Ramsfield, Peter Sloan, Chris White, and Katie White. They have been a delight to work with and have helped to advance the state of the art.

It has always struck me how fortunate I am as an editor and publisher that law is such a supremely literate profession. Almost without exception our writers, whether or not they are lawyers themselves, have given us articulate, thoughtful, well-organized pieces that required little or no editing. And Nora and I were happy to work with those few whose writing needed more, hoping that our collaboration might help some fledgling authors find their wings.

I have to thank Nora, my associate editor, one more time. Had she been able to refuse her mother, I believe she would never have agreed to work on *PDQ*. But having made the commitment, four times a year she put her considerable editing, writing, and teaching gifts at my disposal and, I believe, immeasurably improved the quality of *PDQ* as well as authors’ experience with us. The first author she worked with—one of those few whose writing needed considerable improvement—thanked us afterward for making his article a better product and him a better writer. Those thanks were earned entirely by Nora. Nora has also ably represented *PDQ* at the annual PD Institute; perhaps you had the chance to meet her there.

I would also like to thank Janet Smith of NALP, whom I have known for decades as a superb editor and layout designer. Since beginning the ownership transition to NALP, I have learned to appreciate her good judgment, dependability, and kindness as well. In her role as liaison for the transition, Janet has made letting go of *PDQ* much easier for me and inspired my confidence in its future.

Finally, let me thank you, our readers, for your continuing support and encouragement. Some of you have stayed with us from the beginning, through our first amateurish steps and many missteps, which amazes me. We have never advertised, so it also mystifies me how so many of you found your way to us, including even firms in Canada, England, and Australia. Thank you all.

I wish you the best in your future careers, and I hope that in some small way we have assisted your progress.

With appreciation and warmest regards,



Evelyn Gaye Mara
Publisher and Managing Editor

P.S. Beginning September 1, NALP will take over the *profdev.com* domain, and my personal email address will be gayemara@icloud.com.

August 2014

Dear Colleagues in the PD Community,

I feel like I've had the luxury of being an interested bystander, witnessing the evolution of lawyer professional development at a comfortable distance. From my childhood watching my mom develop her firm's first recruiting program and then other firms' lawyer training programs, to my days at NALP (when it had a total staff of four people and focused primarily on the "Law Placement" of its name), to my many years with *PD Quarterly*, I've witnessed the slow but steady—and generally thoughtful—integration of recruiting, hiring, training, evaluation, and coaching into the current overarching (and usually overworked!) world of lawyer PD.

My sincere appreciation and admiration go to all the contributing authors who were willing to share their own and their organization's learning, expertise, and even mistakes with others in what is, without doubt, a very competitive environment. You yourselves are models of professional development—always examining, learning, improving, and teaching. Thanks, too, for your willingness to consider the two cents of someone without your extensive PD knowledge!

I have truly enjoyed my time at *PD Quarterly*. Those of you who have had the opportunity to collaborate with my mom know what a rewarding experience it is to work with someone so engaged, curious, and knowledgeable. I've learned a great deal from her and from all of you.

My best to you all as you continue to learn and grow—and as you help others do the same.



Honora Mara
Associate Editor

The Z Model of Problem Solving

Gaye Mara

Close this series with a problem-solving model developed by the Myers-Briggs people for use in team-building sessions. It shows the four cognitive functions identified by Swiss psychiatrist Carl Jung (sensing, intuition, thinking, and feeling) used in sequence to solve a problem—and coincidentally shows the essential contribution of each of those functions to arriving at a solution that is truly sound.

The model is typically used with participants who have completed the Myers-Briggs Type Indicator assessment and know their own MBTI types, often as a team-building add-on to a basic MBTI workshop to show the value of the differing preferences in a collaborative effort. That is how I used it.

The Z model shows a four-step sequence for solving any type of problem:

1. **Sensing** to get complete and accurate facts about the problem
2. **iNtuition** to see the implications of the facts and to generate possible solutions
3. **Thinking** to analyze and evaluate the solutions
4. **Feeling** to make sure the solutions satisfy important values and the needs of everyone involved

Hence:



It's been said that the classic business model of problem-solving cuts off the bottom leg of the "Z"—the Feeling step that factors people and values into the final solution.

I developed an expanded Z model (Figure 1 on the next page) which adds the contributions of the four MBTI "attitudes" (extraversion, introversion, judging, and perceiving) to team undertakings.

The real-world process of solving problems is not as linear as the model suggests; there is often considerable back and forth between the four functions. Even so, the Z model provides a useful way of thinking about the problem-solving process and of making sure it touches all the necessary bases.

For those who may not be acquainted with Myers-Briggs concepts, here's a synopsis.

MBTI theory posits that each of us has an innate preference on four dimensions of cognitive functioning – that is, in the way we make sense of the world and decide how to operate within it:

1. *Extraversion (E) vs. Introversion (I)*. Extraverts are oriented to the outer world of activity and interaction; Introverts, the inner world of thoughts and reflection.
2. *Sensing (S) vs. iNtuition (N)*. Sensors are practical thinkers attuned to present reality and the evidence of their five senses; iNtuitives are conceptual thinkers attuned to the underlying meaning of reality and its future possibilities.
3. *Thinking (T) vs. Feeling (F)*. Thinkers decide using objective analysis and logic; Feelers based on empathy and deeply held values.
4. *Judging (J) vs. Perceiving (P)*. Judgers are orderly and decisive, want to control reality and achieve closure. Perceivers are spontaneous and flexible, want to experience reality and defer closure.

The MBTI, through a series of forced-choice questions, charts one's preferences on each of the four dimensions; the result is a four-letter type showing those preferences. My type, for example, is ENTJ (Extraversion-iNtuition-Thinking-Judging).

—GM

Figure 1. Expanded Z Model of Problem-Solving

SOLVING PROBLEMS: THE "Z" MODEL

EXTRAVERSION

Communicate openly and spontaneously
Energize group interaction
Add variety and breadth of interests

INTROVERSION

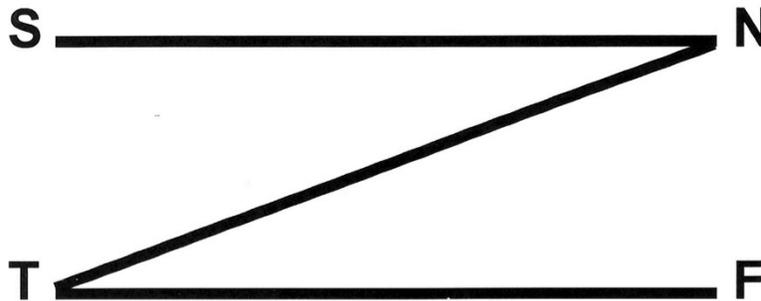
Think things through
Maintain calm and reserve
Add concentration and depth of focus

SENSING

Identify relevant facts
Determine realistic constraints
Implement ideas
Devise incremental solutions
Resist radical new approaches

INTUITION

Consider all possibilities
Brainstorm alternatives
Solve multiple problems at once
Consider the future
Look at trends and patterns



THINKING

Analyze
Dissect
Debate
Create or apply a model
Question fundamental assumptions

FEELING

Involve all parties
Consider effects of decisions on others
Get buy-in from stakeholders
Work to keep harmony on the team

JUDGING

Plan and schedule
Meet deadlines and goals
Bring to closure

PERCEIVING

Adapt plans to new developments
Respond to objections and obstacles
Stay receptive to new information



Editor's Note: This column highlights best practices and new approaches to common challenges of in-house training managers. If you have comments and suggestions for future articles, please communicate them to Janet Smith at NALP, jsmith@nalp.org.

Get People Moving

One of the downsides of all our whiz-bang meeting technology is that it keeps people sitting still for long periods of time. After a while, the body's unfortunate response to that is to power down and put everything, the brain included, on "Snooze." How often have you had to fight to stay awake through a lengthy slide presentation, even though the subject interested you? And, if the presentation follows a hearty lunch or dinner, you might as well just go take a nap.

Some presenters will blessedly take periodic stretch breaks just to get the juices flowing again. That definitely helps. But my preference is to integrate into the agenda a "twofer," an activity that gets people out of their seats while also accomplishing a learning or decision-making purpose.

Here are two such activities that have worked well for me:

1. The Line Up: An Awareness-Raising Exercise

You are leading a group session to which the participants bring differing views on the subject to be discussed. After providing the necessary background on the topic, you want to highlight those differences in a nonjudgmental way before opening the group discussion. So you draw an imaginary line

(or lay down a line of tape) across an open area of the room, designate each end of the line as a polar opposite, and ask participants to place themselves along the line according to their view and how strongly they hold it.

For example:

- "If you prefer A, go to this end of the line. If you prefer B, go to that end. If you have no preference, stand in the middle."
- "If you would give your right arm to have the chance to be/have/do A, go to this end of the line. If you would rather have a root canal, go to that end. If you don't really care about A, stand in the middle."

You can also use the resulting line up to set up breakout groups of those who hold similar views, who can then discuss the issue at hand and report out their shared views to the full group. For example, if you have 24 participants and you want to break them up into four groups of six people each, have them start counting off the numbers 1 to 6, one number per person, from one end of the line to the other; have each successive group of 1-6 peel off and go to a separate table for the break-out discussions. They will report out some very different perspectives that can then be compared and considered in a full group discussion.

2. Dot Voting: A Group Decision-Making Process

You have a long list of possible alternatives—for example, suggested discussion topics for a retreat, suggested candidates for a committee—to fill a limited number of opportunities. You need input on the selections from a large group. So, after adequate clarification and discussion of the alternatives, you hang the list on the meeting room wall on large poster boards or sheets of paper. (The list may be prepared in advance or may be elicited from the group during the session and handwritten on flip chart sheets. Make sure there's a generous margin beside each item.)

Give each participant a sheet of stick-on colored dots (office supply vendors carry them as “Color Coding Labels”; I like the red ones for their visual “pop,” but they come in other colors as well), with the number of dots about equal to the total number of choices to be made, then ask them to stick a dot beside each of their preferred choices until they've used up all their “votes.” For example, if you have to narrow 20 possibilities down to 6,

you might give each of the participants a sheet with 6 dots; they can then put one dot next to each of the 6 candidates they prefer. You could also give them a few extra dots, and/or allow them to put more than one dot by any option they especially favor. Following the latter procedure gives an individual fewer overall selections, but in the aggregate it manifests which options are most strongly preferred by the group.

At the end you should have a clear showing of the group's preferences. People also seem to enjoy the process of calculating how to distribute their votes for maximum impact and just the act of slapping the dots onto the paper.

Both of these activities will not only re-energize your participants while producing a useful output, they will also generate some social give and take as people move around. That's actually a “threefer.”

—Gaye Mara

Making Training Count

Gaye Mara

Editor's Note: This article was first published in the June 1998 edition of The Capital CLE Calendar, PDQ's predecessor journal. The article had been solicited by another legal publisher, who asked me for a piece about in-house training but who declined the article after reading the manuscript because it was not "positive enough" about training. (That, of course, was the point.)

Your firm has just put on its annual writing skills workshop for associates, taught by a nationally renowned legal writing consultant. The participants have rated the program "excellent" on all counts. That is gratifying, especially since you figure the firm's cost at over \$30,000:¹ \$5,000 for the consultant's time and travel, plus \$25,000 in lost billable time for the associates who took part, plus something more for catering, administrative time, and miscellaneous expenses.

You ask a few associates what they got out of the program. One, known as a good writer, says she picked up "a couple of useful ideas" she plans to implement. Another says he agrees with the instructor's approach and only wishes the partners he works for shared that perspective. A third offers that it was valuable "to be able to think about writing as writing," and also just to get everyone together because it "promotes collegiality and reinforces the firm's commitment to associates."

You know from experience that when the next associate evaluation cycle rolls around, there will still be the usual complaints about associates' writing. And when the next annual budget cycle rolls around, the funds allocated to the in-house training program will largely depend on everyone's positive feelings about it, because there's no hard

evidence that the firm is getting a return on its investment in training.

Is there a better way? Yes.

1. Training Strategically

The most surprising thing about many law office training programs is how little analysis goes into them. Surprising, because this is happening in organizations that overflow with analytical talent. Any time a performance problem surfaces, the usual solution is to throw some training at it. If it sticks, great. If it doesn't, then we throw some more training at it or, in the worst case, conclude that the throwee just "isn't a good fit" with the firm and start easing him or her in the direction of more suitable employment.

If we really want to improve performance, we must study it more carefully. The goal, after all, is not to put on training programs; it is to produce work that meets the firm's standards and results that satisfy its clients. Training can help with that, but it is not the only approach nor even always the best one to strengthen performance.

The first thing to recognize is that formal training is an expensive way to solve a performance problem, even if—especially if—it is designed and delivered by in-house faculty. That is because the greatest cost of training is not trainers' fees, but attendees' time. In an environment where time is the most precious resource of all, training

¹ 2014 Update: In the 16 years since this article was first published, the cost of the workshop would no doubt have grown significantly.

should be reserved for critical competencies that the firm has identified as strategically important to its success. And then the training should be done as effectively and time-efficiently as possible.

2. Analyzing Performance Factors

A second important fact is that training can solve only the performance problems that result from lack of knowledge or skill. If people already know how to do something, more training won't help.

Studies in a variety of organizations have consistently shown that a minority of performance problems—perhaps 15%—result from lack of knowledge or skill. In other words, the great majority of performance problems—some 85%—will not respond to training. That is because they result from other factors, such as:

- lack of internal motivation and/or external incentives to perform (often including affirmative disincentives);
- unclear or conflicting expectations about what to do or how to do it;
- inadequate time, resources, or authority to fulfill the expectations;
- work environments, systems, or procedures that impede work instead of facilitating it.

Even where the training need is clear, these other performance factors should be dealt with because they can negate the best training.

For example, supervisory skills training for partners is often proposed. Many partners will readily admit they could be better supervisors. Yet even when excellent training is done, supervision does not improve. Why? Because all the partners' incentives run to producing billables, not to developing associates. Firms must revise the incentives to get any benefit from the training.

Similarly, when we investigate the reasons behind associates' writing problems, it sometimes turns out there was poor communication about the assignment, or they were asked to put in no more than X number of hours on a project that realistically required substantially more time.

Sending them to a writing workshop won't fix those kinds of problems. And it won't even fix a skill deficit if the techniques they learn in the program conflict with supervisors' expectations.

3. Selecting Learning Approaches

Third, formal group instruction—what we usually mean when we say “training”—is only one of many ways professionals can learn new knowledge and skills. Training is at its best when:

- the members of the group are all at a similar, threshold level of competence;
- they need to learn the same specific things;
- those specific things have been identified prior to the training and designed into it; and
- they will have the opportunity to apply what they learn soon and often (“Use it or lose it” is a cardinal rule of training).

Other good ways to strengthen competence are through challenging assignments, individual coaching and feedback, good documentation (like user manuals, procedural checklists, model documents), ready access to internal experts and information, user groups and other special interest groups, and participation in professional networks and activities. These approaches are usually more efficient and often more effective than formal training. They are always a useful adjunct to it.

4. Evaluating Return on Investment

Finally, evaluations that tell us what participants thought of a training activity don't tell us as much as we need to know about the firm's return on investment.

Participant feedback is only the first of four possible levels of training evaluation:

1. Reaction (how participants rate the training, or "smile sheets")
2. Learning (whether they learned what the training was meant to teach)
3. Performance (how their work has improved)
4. Results (how outcomes have improved for the firm and clients)²

The deeper the level at which we evaluate, the more confidence we can have that the firm is getting its money's worth from training. Level 2 (learning) evaluations are most commonly done with pre-tests and post-tests. Level 3 (job performance) is easy if the firm has a first-rate performance

appraisal system and the timing is right; alternatively, direct feedback can be collected from supervisors. Level 4 (results) is the most difficult; depending on what types of data the firm is already collecting, it may require a little or a lot of extra effort such as tracking writeoffs or conducting a client survey.

By whatever means, evaluations at Levels 3 and 4 ought to be done at least occasionally. They will show you where training is repaying the firm's investment, and perhaps also where it is not.

Good training can be expected to produce competence, but at high cost. For that reason, training should be done only where competence is lacking and is critical to the firm, and where other, less costly performance solutions would be less effective. And the impact of training—in increased competence, in improved job performance, and in better outcomes for the firm and its clients—should be tracked to ensure that the firm is investing wisely.

² 2014 update: This four-level model of training evaluation was developed by the late Donald L. Kirkpatrick (1924-2014), whom we should have credited in the original article, for his Ph.D. dissertation in 1954. His book *Evaluating Training Programs* (Berrett-Koehler 1994) expanded on the theory.

Professional Developments

News and Press Clips

The Case for Reforming Legal Education, cont'd

A recovered lawyer has written a good article for *The Atlantic* on the reasons that so many lawyers leave the practice and the resulting boom in career transition counseling.

The author lays much of the blame for attorney disaffection and attrition on traditional legal education:

While law schools are efficient at funneling students into law firms, much of the curriculum is based on theoretical analysis, and, as a result, there's a disconnect between the training students receive and the skills required in practice. "People graduate from law school not knowing what lawyers actually do," says [Marc] Luber [founder of J.D. Careers Out There, a website for lawyers in career transition].

(Leigh McMullen Abramson, "The Only Job With an Industry Devoted to Helping People Quit." *The Atlantic*, July 29, 2014. Accessed online at www.theatlantic.com/business/archive/2014/07/the-only-job-with-an-industry-devoted-to-helping-people-quit/375199/)

Report on Online Orientation

Steve Gluckman and LawFirmElearning have issued a free, short (10 pages) report on how law firms are using online resources to carry much of the load of new-hire orientation—to ensure consistency, support review and recall, and enable “pre-boarding” engagement of new hires even before they arrive at the firm. There’s useful advice for firms that would like to start an online program.

(“The Law Firm Online Orientation Report: New Hire and Lateral Online Orientation

Trends and Practices.” LawFirmElearning, Summer 2014 Online Learning Trends Report. Available for free download at www.lawyerlearning.com/Law_Firm_Online_Orientation_Trends_Report.pdf)

Resource for Improving Work-Life Balance

Brenda Fingold is a former litigator and former Professional Development Partner at Hale & Dorr. She is also a founder and past chair of the Professional Development Consortium, which is where your editor came to know and respect her.

A battle with colon cancer in 2000 convinced Fingold that “my capacity to do meaningful work and live a full life depended on my paying better attention to myself.” She spent much of the following decade studying and teaching about stress and balance and developing the resources “to help others recognize that they have the power right now to create more balance, health and well-being in their lives even as they sustain high performance in their chosen career.”

That preparation has come together into Back to Balance, a consulting, coaching, and training resource for high-performing professionals and their organizations. Fingold has a website under construction and in the meantime can be reached at 617.413.7631 or brendafingold@yahoo.com or through LinkedIn.

Our Favorite E-Newsletters

Two newsletters that just landed in our inbox reminded us that we should again recommend them to you.

Annie Murphy Paul produces *The Brilliant Report*, a “newsletter bringing you the latest intelligence on learning” —that is, the

findings of current research. Paul is an engaging, intelligent freelance writer with good and timely content. Several of her recent issues have covered interesting research findings about the strengths and limitations of technology-based instruction. You can check out her blog and sign up for the newsletter at her website, www.anniemurphypaul.com.

Will Thalheimer does his own original research and gives away an amazing amount of it through his website and his e-newsletter *Will's Insight News*, "Research-Based Practical Wisdom, Workplace Learning & Performance." The July 30 issue explains why and how to do a learning audit to analyze the strengths and weaknesses of your PD program and identify ways to improve it. You can sign up for his mailing list and see what else he is up to at www.work-learning.com.

ACLEA Qualifies for AARP Membership

The Association for Continuing Legal Education (aclea.org) will celebrate its 50th anniversary at the upcoming Annual Meeting in Boston. The conference offerings include a pre-conference workshop, In-House Legal Training Deconstructed, "to provide law firm CLE providers with the fundamentals on providing quality continuing legal education to their attorneys."

Conferences

Legal Profession:

- 8/2-5/14, Boston, MA. *50th Annual Meeting*. Association for Continuing Legal Education, www.aclea.org.
 - 8/7-9/14, Boston, MA. *ABA LP Annual Meeting*. ABA Law Practice Division, www.americanbar.org/groups/law_practice.html.
 - 11/5-9/14, San Diego, CA. *LP Fall Meeting*. ABA Law Practice Division, www.americanbar.org/groups/law_practice.html
 - 12/3/14, Washington, DC. *2014 PDC Mid-Winter Meeting*. Professional Development Consortium, www.pdclegal.org.
 - 12/4-5/15, Washington, DC. *Professional Development Institute*. National Association for Law Placement, www.nalp.org/events.
 - 1/31-2/3/15, San Diego, CA. *51st Mid-Year Meeting*. Association for Continuing Legal Education, www.aclea.org.
 - 2/19-21/15, Charlotte, NC. *Newer Professionals' Forum*. National Association for Law Placement, www.nalp.org/events.
- ### General Audience:
- 9/8-9/14, Boston, MA. *Performance Support Symposium 2014*. eLearning Guild, www.elearningguild.com.
 - 9/9-10/14, Seattle, WA. *Telling Ain't Training*. Association for Talent Development (formerly American Society for Training & Development), www.astd.org/Events.aspx
 - 9/9-11/14, Saratoga Springs, NY. *MOOC's & Corporate Learning: Symposium & Lab*. The Masie Center, www.masie.com.
 - 9/16-17/14, Atlanta, GA. *Training Ain't Performance*. Association for Talent Development (formerly American Society for Training & Development), www.astd.org/Events.aspx.
 - 9/25-27/14, Warsaw, Poland. *ISPI EMEA 2014. Cultivating a Culture of Performance Improvement: Agile Response & Tangible Results @WorkerWorkWorkplace World*. International Society for Performance Improvement, www.ispi.org.
 - 10/2/14, Washington, DC. *ATD "Learn from the Best" Conference*. Association for Talent Development (formerly American Society for Training & Development), www.astd.org/Events.aspx.
 - 10/8-11/14, Baltimore, MD. *NASAGA 2014 Conference: "Playing Stories, Sharing Worlds, Imagining Games for Learning."* North American Simulation and Gaming Association, www.nasaga.org.
 - 10/13-14/14, Chicago, IL. *Training Ain't Performance*. Association for Talent Development (formerly American Society for Training & Development), www.astd.org/Events.aspx.
 - 10/23-24/14, Denver, CO. *Telling Ain't Training*. Association for Talent Development (formerly American Society for Training & Development), www.astd.org/Events.aspx.

- 10/26-29/14, Orlando, FL. *Elliott Masie's Learning 2014*. The Masie Center, www.masie.com.
- 10/29-31/14, Las Vegas, NV. *DevLearn 2014 Learning Technologies Conference & Expo*. eLearning Guild, www.elearningguild.com.
- 11/4-5/14, Herndon, VA. *Telling Ain't Training*. Association for Talent Development (formerly American Society for Training & Development), www.astd.org/Events.aspx.
- 12/11-12/14, Atlanta, GA. *Telling Ain't Training*. Association for Talent Development (formerly American Society for Training & Development), www.astd.org/Events.aspx.

Courses and Certificate Programs

American Management Association,

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.

Association for Talent Development (formerly American Society for Training & Development). See the relevant web page for online and/or on-site dates and locations for each topic.

CPLP Certification: Certified Professional in Learning & Performance, www.astd.org/Certification:

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 ATD 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

ATD Master Instructional Designer Program.

www.astd.org/Education/Programs/ASTD-Master-Instructional-Designer. Program highlights include:

- an overview of design fundamentals
- a three-day, face-to-face course
- a case study discussion and evaluation of learning
- use of real-time on-the-job design projects
- multiple opportunities to practice and improve your final learning project

Class size is limited to 16.

ATD Master Trainer Certificate Program,

www.ASTDMasterTrainer.org:

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.

Other ATD courses and certificate programs in the following subject areas, online or face-to-face, www.astd.org/Education.aspx:

- 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

Cornell University Human Capital Development Program. 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.

George Mason University Leadership Coaching for Organizational Performance Certificate Program,

www.ocpe.gmu.edu/programs/org_dev/leadership_coaching.php.

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 held in Fairfax, VA, supplemented by distance learning and independent work between modules:

- 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

Harvard Law School Program on Negotiation, Cambridge, MA. All courses held in Cambridge. www.pon.harvard.edu.

Fall 2014 Program:

- 1-day courses:
9/18/14. *Winning at Win-Win Negotiations*
10/30/14. *Understanding Diplomacy and International Negotiations*
12/11/14, *The Art of Saying No: Save the Deal, Save the Relationship, and Still Say No*
- 3-day course:
9/15-17/14. *Negotiation and Leadership: Dealing with Difficult People and Problems.* (Repeated 10/27-29 and 12/8-10)
- 5-day course:
10/13-17/14, *Mediating Disputes*

Harvard Negotiation Institute, June 1-5 and 8-12, 2015:

- *Negotiation Workshop: Strategies, Tools, and Skills for Success*
- *Mediating Disputes*
- *Negotiation Workshop: Improving Your Negotiating Effectiveness*
- *Intensive Negotiations for Lawyers and Executives*
- *Advanced Negotiation: Making Difficult Conversations More Productive*
- *Secrets of Successful Deal Making*

International Society for Performance Improvement, www.ispi.org. Monthly one-hour "SkillCast" webinars on a variety of performance and development topics.

Ithaca College Online Professional Development and Certificate Programs,

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

- Performance Improvement Management
- Strategic Communication Management

NALP/ALI-CLE Online Programs for PD

Professionals, www.ali-cle.org. Archived video webcasts:

- 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 “NALP live video webcast” in the *Search* box on the home page.)

Training Live+Online Certificate Programs,

www.TrainingLiveAndOnline.com. Online courses; check the web site for dates:

- Advanced Articulate Storyline for eLearning
- Creating Engaging eLearning with Articulate Storyline
- Designing eLearning for Mobile
- Designing eLearning with Captivate
- Developing Small Bites Learning
- How to Facilitate Training with Impact
- Instructional Design: Performance-Based and Results-Focused
- Maximizing Adobe Connect for Training
- Project Management for Learning Professionals

- Scenario-Based eLearning Design
- 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,

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

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.

Pennsylvania State University, Master of Professional Studies in Organization Development and Change, www.worldcampus.psu.edu/degrees-and-certificates/organization-development-change-masters/overview

A 33-credit online curriculum including 9 required courses (27 credits), one elective (3 credits), and one field-based project (3 credits).

University of Pennsylvania Executive Education for Chief Learning Officers, <http://pennclo.com>.

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. The program is titled *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.

Saint Joseph's College Online—Master of Science in Education: Adult Education & Training Concentration,

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

"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." 33 credits.

Villanova University Master of Science in Human Resource Development,

www.villanovau.com/hr-masters-degree/. 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

