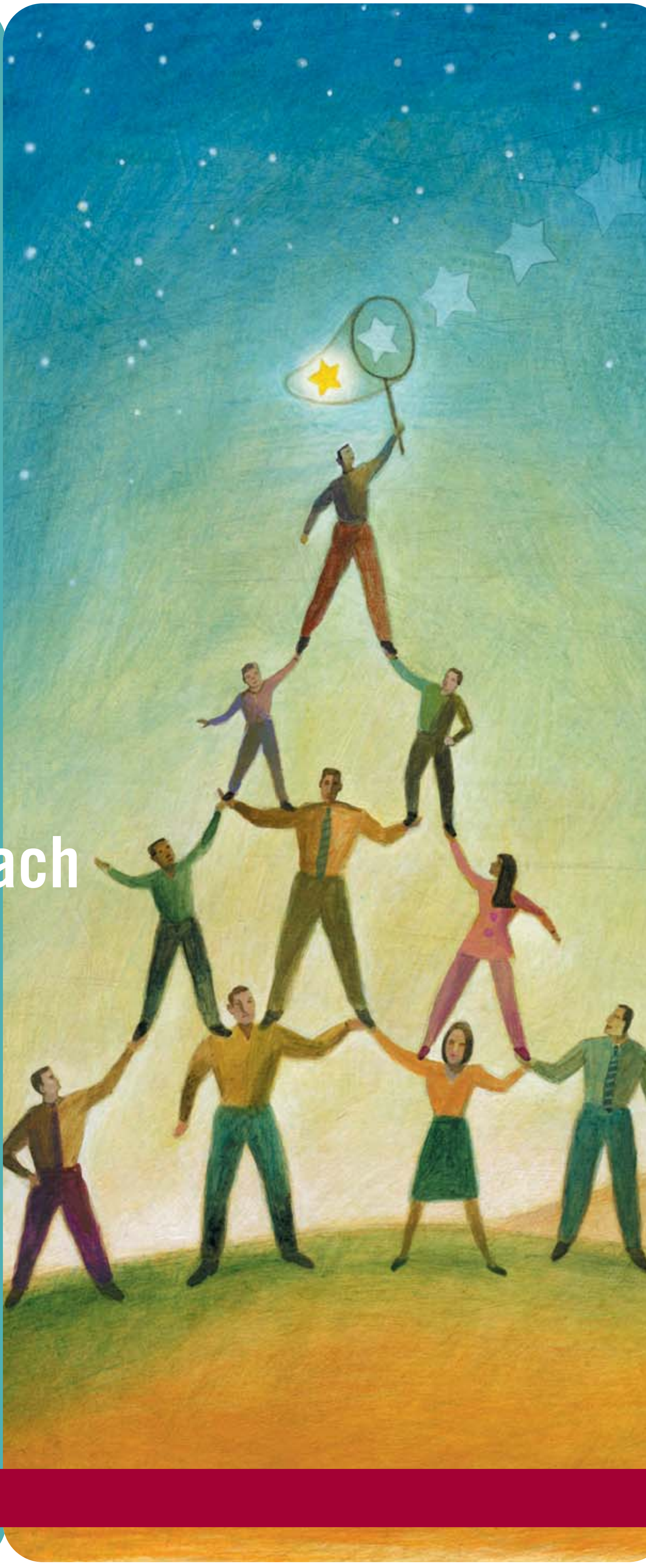
International Legal Technology Association

User Support

Resources Within Reach



November 2007

A Publication of ILTA

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EDITOR'S NOTE

User support comes in so many flavors — helpdesk, new hire and continuing education training, just-in-time learning and more — you can't pick just one. How do you determine which flavors work best in your organization? You could place scoops of each flavor on top of each other, but you run the risk of the entire stack toppling over. Or you could throw them all together in a blender in the hope you'll make the perfect milkshake. Sampling each is the best approach to help with your decision.

We thank our authors for offering up gallons of ideas, tips, techniques and scooping expertise!

Ken Hansen, Editor

ABOUT ILTA

Providing technology solutions to law firms and legal departments gets more complex every day. Connecting with your peers to exchange ideas with those who have "been there done that" has never been more valuable.

For nearly three decades, the International Legal Technology Association has led the way in sharing knowledge and experience for those faced with challenges in their firms and legal departments. ILTA members come from firms of all sizes and all areas of practice, all sharing a common need to have access to the latest information about products and support services that impact the legal profession.

Statement of Purpose: ILTA is the premier peer networking organization, providing information to members to maximize the value of technology in the support of the legal profession.

International Legal Technology Association

by Charlene LeMaire of Traveling Coaches, Inc.

:: Focusing User Support and Training

At the Practice Group Level

There is growing interest in our industry toward a radical change in training philosophy. It is moving away from "one size fits all" training to an approach that focuses on each practice group within the firm and the particular needs of that group. The focus also shifts from "training" to "learning." The word "training" implies teaching a specific skill to an individual or group in a traditional classroom setting, and the trainer's time is frequently consumed by training details (curriculum, classroom setup, time scheduling, etc.). Learning focuses on a partnership between educator and learner, it is more individualized, and the desired outcome is to impact the learner's work habits and productivity positively.

Before diving into this new approach:

Start slowly. Select one practice group or practice area. Pick an area where you have a good relationship with the users, or pick a practice group that is already supportive of technology and understands how they can use it to improve their practice. Identify the practice group head who is willing to motivate his or her group to work with you.

Encourage learning in practice groups. Design training/education for all members of a practice group: partners, associates, assistants and secretaries. You may need to change your thinking and processes from training-specific to learning-focused.

Redefine the role of the training professional. Not only is there a need for a new approach to technology training, it may be time to rethink the role of the training professional.

Effecting Change – Getting Management Buy-In

To effect a change to a practice group learning focus, the training and support professionals must first develop goals and possible positive outcomes. Then they must "sell" these outcomes to management to gain support for the change.

Some possible goals and outcomes might be:

Spend less time producing quality documents. Better document production skills will lead to faster and more accurate first drafts of legal documents.

Spend less time searching for e-mail content by using a better repository for shared electronic communication. As long as attorneys bill by the hour for the work produced, working more quickly may not be viewed as beneficial.

Improve the quality of life for users by focusing on efficiency. The younger associate will value the time he or she can spend with friends and family.

Determine the business need behind this effort. The need might be to stay ahead of competitors, improve client service delivery or other.

From Training Professional to Practice Group Analyst

Once you have received management support for change, the next step is to change your own role. The training professional needs to become a practice group analyst.

Analyze the business processes of the practice group. Start by learning more about the business of law. What is it the users you support actually do? Take an attorney to lunch. Have the practice group leader educate you on what is done in that practice. Meet with a secretary and an associate. Ask questions like:

How do you develop new clients?

How do you delegate work to others?

What keeps you up at night?

How much of your client communication is done via e-mail?

Do you collaborate with other clients via e-mail?

Do you need to send documents to clients and co-counsel?

Do you depend on the client or co-counsel to make modifications to documents?

Do you need to track the changes that are made?

How do you track the e-mail messages you receive?

Do you have an electronic filing system in place in Outlook?

Are you keeping paper copies in the client file? Is this a requirement of the court or client?

Listen to the answers. Don't advise or attempt to change anything at the analysis stage.

Analyze the make-up of the group. Do your homework.

"Who" is "who" in this group?

What are their backgrounds?

When did they join the firm?

How did they join the firm (associates, laterals, etc)?

Did the whole group join the firm at once?

In what training offerings have they participated and how long ago?

Did they attend any recent rollout training?

Are they participating in any ongoing training (either classroom style or e-learning)?

Are they using the support offerings available at the firm?

Are they calling the helpdesk? Review the helpdesk reports to see the types of questions they are asking and the resolutions that have been shared with them. If there have been problems that have not been resolved, be ready to listen to them.

Analyze group dynamics. Move to a desk in the practice group for a while. Observe the group dynamic and how the attorneys, paralegals and secretaries work together. Ask questions, listen and watch.

Conduct a document analysis. You are looking for whether or not the documents produced by this practice group follow the firm's best practices approach to document production. Even though much of the secretary population of the firm has been trained on how to style and number a document, a document audit can tell you if they are actually applying their skills in the documents. If the majority of the documents for this practice group do not follow best practices, then find out why.

Find out who in the group is drafting the documents. If the attorneys are doing most of the document drafting, they probably do not have the necessary skills to follow best practices. As you discover who is producing the first drafts of documents, you can then ask them how they go about it. Do you start with a form or template? Do you start with an existing document and modify it to fit your needs? Do you borrow text from other documents, PDF files or HTML? Is this content added to the document and then modified? Are you familiar with the firm's numbering tool?

Gather information using data analysis and interviews with both the practice group members and the user support and training team members who have the most experience with this group. If this group does not work with support or training, where are they getting their information? From each other?

Finally, gather your findings and review what you have. Don't make recommendations during the interview or observation process. This will distract from the real purpose of these meetings which is to learn as much as you can about this area of law, how the participants work together and how technology is currently used. Hold back on changing things at this stage.

From Training/Support Professional to Practice Group Consultant

Now that the analysis phase is complete, it's time to consult with the practice group. This is a real shift from standing at the front of a training room and teaching a class, to becoming a trusted advisor to a practice group, an advocate for the group and a liaison between the group and the technology department of the firm.

Consider this example of the role of the practice group consultant. In your first meetings with the practice group leader, you determine that a goal of the practice group is to serve clients better. During the analysis phase, you determine the senior attorney keeps a paper desk calendar, the secretaries use electronic calendars and the associates use a combination. You determine clients can be better served if everyone in the group uses electronic calendars to keep track of appointments, court dates, etc.

As the consultant, you will work to get all practice group members to use their electronic calendar. You explore current and new technologies that fill the need, identify the ideal workflow for using the chosen technology, and craft a learning plan for group members to learn the skills and workflow necessary to meet the goal.

Be a software consultant. Use your knowledge of current technology and how it is used by the group to recommend software or other technology that can better serve the group or individual group member needs. Continue to explore emerging technologies and identify opportunities for meeting the established goals and outcomes. Does the group need additional tools or can existing software be modified/customized to meet their needs?

Be a workflow consultant. Have you observed something happening that has caused the attorney to lose confidence in the technology? I once was called to troubleshoot a situation where an attorney was frustrated with saving documents into the DMS. She believed that her documents were being lost and edits were not being saved. She swore that the earlier changes she had made were not evident in her documents the next time she viewed them to make additional edits.

This attorney needed help. Observation of the secretary and attorney revealed the work process itself was faulty. The attorney did not know how to search for documents in the DMS, so her secretary searched for the attorney's documents and e-mailed copies of the documents for editing. The attorney would open the attachment in Outlook, make changes and e-mail the document back. The secretary would then open the document from e-mail and copy/paste it over the original document in the DMS.

Shocking, isn't it? When the attorney called the helpdesk to report that changes were not being saved, she was right. It was not a fault of technology but rather how the technology was being used. Providing just a little guidance (tweaking if you will) of the processes the attorney and secretary had in place was all it took to correct the situation.

Be a learning consultant. Create custom learning plans either for the individuals of the group or for the different roles within the group. Pull together the necessary coaching, training or mentoring needed. Set specific goals for the practice group, and set objectives for each learning plan. What can they do? What should they be able to do? How are you going to train them? Should you be training them? Do they need classroom training? Personal mentoring? Coaching?

Measure Your Success and Publicize the Results

Look at how many billable hours were produced by the group before the start of the practice group initiative. Where are they six months and one year later? What has changed for this group? Have the goals first established for the group been met? If your results were positive, be sure to publicize your success to other practice groups within the firm. Use quotes from the senior partner, associates and secretaries. This positive publicity will make it more likely that the other groups will transition to the new approach.

Classroom training still has its place in law firms (rollout training, ongoing training for secretaries and staff, etc.), but shifting the focus from training to learning can subtly change attorney perceptions that "training" is not valuable. Who doesn't want to learn? And, who is better equipped to make this shift than the trainers?

Trainers understand both the current and emerging technology. Trainers know how to determine the needs of the users and develop learning plans to meet those needs. Trainers have excellent presentation skills. This new approach requires trainers to have a high level of professionalism and to add a few new skill sets to their repertoire — communication and listening skills as well as analytical and problem solving skills. Allow some time for trainers to reach a comfort level with their new role as consultants and analysts.

If a practice groups' attorneys won't attend classroom training, take the learning opportunity directly to them. Not all members of a practice group need to have the same level of technical expertise, but all should be using the same best practices.

Practice group learning should be a way to help law firms become more productive and successful. Changing the role of the training/support professional could have a long term impact on perceptions about "training" with the positive result that each practice group will use their own best practices, and the firm as a whole will practice law at their best.

by Ann Gerbin, Tony Hartsfield and Thomas Pullen of Bryan Cave LLP

:: Successful Online Learning Deliverables

It's All About Content and Disposability

There is no substitute for good content in the world of training. As we're tasked with delivering quality e-learning content for Web consumption, we might be tempted to recreate entire training manuals online. But is that the ideal solution for that environment? Before starting your e-learning endeavor, consider honing your processes for content creation. Focusing on task-based, disposable deliverables can reduce your turnaround time on product creation.

Ready, Fire, Aim!

You get a new authoring application, fire it up and start to record . . . then suddenly, you draw a complete blank. Absolutely nothing comes to mind about how to approach it, what to say, etc. Or the exact opposite happens. You hit the "record button" and proceed to create the three-hour epic saga of the Start Button. A stellar effort, but the history of the Start Button is of little importance to users. They need to know how to launch an application, not hear the details of how it's now green when it used to be gray, or how the Start Button changed your life.

What's more important: the final product or the content inside the final product? If you begin to view the delivery mechanism (live classroom instruction, manual, reference card, video, distance learning, blog and podcast) as nothing more than a tool to accomplish a goal, your entire outlook on the learning development process will change.

Emphasizing Substance over Style

It might be tempting to think of training materials as "high art," but in reality, these are just sets of instructions to get someone through a task. Put too many fancy effects in place and the message may be lost.

This isn't to say that the final product shouldn't look good. In fact, it should look great. It should contain all the personal touches that make your firm unique. But care must be taken to ensure that the “look and feel” does not distract from the message.

For example, there was a clever “herding cats” ad during the Super Bowl a couple of years ago. It was one of the funniest, most poignant commercials ever. People loved it. But what company was it for? What do they do? The next time you have a feline stampede in your yard, they’re definitely the ones to call. But what were they really trying to sell?

The best training tools are transparent to the user. In a film class, they will tell you that if camera movement, lighting or editing ever keeps the viewer from following the storyline, you have failed. Keep yourself focused on the content you are to deliver, and make sure every single tool you choose for delivery supports your vision.

Who’s to say what makes great content? You can climb to the top of Everest or look for inspiration in a toasted-cheese sandwich. Whatever your creative process, you ultimately will have to determine for yourself what is important. But like art, you probably know good content when you see it. Here are a few places to look, along with some of the lessons we’ve learned in our own training team evolution at Bryan Cave.

Start with Clarity

Does it make sense to you? If you wrote it, does it make sense to anyone else? Is it consistent? Do you perform functions in the same manner, or are your directions for performing one task completely different from other similar tasks? Pick a standard and stick with it. It may not be the preferred method for all of your users, but it’s far more important that a consistent message come from the training department.

For instance, our content displays the use of menu commands instead of right-click or keyboard shortcuts. It can be difficult to communicate the difference between a left and right click in a video format, and shortcuts are nearly impossible. (True keyboard hounds will find their beloved shortcuts on their own anyway). For consistency’s sake, both the documentation and video should perform functions the same way (File menu and Save, instead of Ctrl + S).

Know the Difference Between Information and Instruction

There is nothing wrong with giving “information,” but you must ensure users are clearly able to differentiate between information and actual instruction. Don’t bury tasks or steps inside paragraphs of background information. Decide on a standard, and be consistent in your application of it.

A key consideration is whether your users (especially lawyers) can learn from your content without additional explanation from an instructor. If you are creating anything other than stand-up training, you must assume it will be used in ways (and at times) you never imagined.

Lawyers are fond of working all hours of the day and night. They may be working under a very tight deadline and, for example, need a quick refresher on metadata. Will your product stand independently, or will you be getting a panic phone call at 3:00 a.m.? A really good reason to make your content self-supporting and user-friendly: SLEEP!

Assess Your Training Team’s Abilities

Do you have the skills on your team not only to gather “best practices” and technically-correct information, but also to distill it into digestible nuggets of information for the user? If not, can you find some of these skills internally with subject matter experts, or will you need to consider bringing in help, even if just on a temporary basis?

Within our own team, the three of us bring very different disciplines to the table, a diversity of skills which allows us to go places with our training that, on the surface, may not be immediately apparent. Without those differing styles, we could have lots of “cool” effects and absolutely no focus. One of us can rope in the others and make the ideas practical. When two of us are looking for a seemingly “simple tweak” to an online tool, the third person can figure out how to make that work in the real world without compromising data integrity or breaking other online applications. Someone else may be the perfect “go to” person for knowing how an end user will perceive and assimilate new technology.

What nontraining skills does your team have? You may be surprised at how useful some of your “past lives” may be. Some disciplines we bring to the table are business (process workflow mapping and operational design, business administration, financial, management, marketing and human resources); technical (video direction and production, print publications, audio engineering, Web design and development and programming); and interpersonal (public speaking, communication, group dynamics, motivation, educational psychology, adult learning theory, customer service, religious studies, education and leadership).

These are just the “formal” hats we have worn. It looks like a laundry list of skills, but we are so much more than “just trainers,” and so are you. Dig deep and find out what skills you have at your disposal.

Assess Your Processes

We have selected different tools for content delivery over the years and have seen an increase in content delivery and user acceptance when we improved our content creation processes. No matter how cutting-edge our deployment mechanism, it is always the content that drives success.

For more information, check into some process improvement classes or seminars. This is a really hot topic in the manufacturing industry, so don’t limit yourself to “legal-specific” seminars. Look for information on process documentation and improvement methodologies. You don’t need to explore all of Taguchi’s experimental design technique or “six-sigma” (a term given to reducing defects to 3.4 per million). Learn how to document what you do, how you do it and how it impacts those around you. It will be time well spent.

Once formalized on paper, decide whether or not your process is repeatable. Repeatability is one of the most basic requirements of process improvement. However, success in making a process repeatable does nothing if you consistently turn out bad product. You need to take that next step toward making your process effective.

Go back and revisit your goals. How will you know when your product is good? Once you define that, you’ll be better able to determine the steps needed to reach that goal and out of that, have an effective and repeatable process. If you have both the repeatable and effective elements under control, you can begin to work toward making your process efficient. This is more challenging, and we’ll go into greater detail a little later in the article. Simply put, you must be able to deliver a quality product the same way, every time.

Apply Firm Training Resources

Consider purchasing at least some of your learning content. There are many comprehensive documentation packages out there for almost every application you might use. You can look at these in a few different ways. Of course, the first is to buy and implement them right out of the box. The second is to edit them slightly and then release them to your users. The third, an approach we have found very helpful, is to use the documentation packages as "comprehensive source documents." We treat them as the "source" of all products we will produce.

Comprehensive source documents are costly and time-consuming to develop in house, especially when confronted with new applications or major upgrades. Depending upon how much your firm wants to invest and whether or not your training department has a qualified instructional designer, you can contract with vendors to provide part or all of your materials. We were able to save money equivalent to nearly half the annual salary of adding one person by purchasing products. Having access to professionally developed style guides is also valuable. Even if your end result differs from what you purchased, you can benchmark against their standards.

Target the Core Skills of Your Enterprise Applications

Henry David Thoreau is often quoted as saying, "People seldom hit what they do not aim at." While somewhere in the back of our minds, we have a problem accepting that Thoreau would end a sentence with a preposition, the idea is sound. Pick your target, and work to that end and that end only. You can always come back and pick up the other stuff.

For example, your people don't need to know everything about your e-mail program. Of course, some will be curious, but the vast majority will be interested only in the essentials, and those items should be addressed first. Otherwise, by the time you've finished with one application's content, it will be time to upgrade, and you'll have to start all over again.

QA Your Content for Clarity and Consistency

Your users, particularly lawyers, will be quick to point out discrepancies. They LOVE doing this; it's what gets them out of bed in the morning. Don't take it personally; it's not directed at you. Their success often depends on their ability to look at something quickly and poke holes in it.

Define the roles of your team. Who is going to draft the material? Who will review and edit it? Who publishes it, etc.? Many firms do not have the luxury of a training team; in some firms it's a team of one. Even in those situations, someone can help you proof your work before it goes out to your community.

You must always use a second set of eyes. If you have to go through word processing or the department secretary, do it. In fact, having nontraining eyes review your materials before they go public is a good idea. Being a "team of one" is no excuse for not delivering quality. You may have to scale back on the quantity, but never settle for second best.

Design for Disposability

A major automaker has a new vehicle platform people are referring to as the skateboard. Essentially, it is a complete vehicle, including fuel cell and drive train, all contained in a mass produced chassis. Many different body types can be added at very little cost. You could drop a two-seat convertible onto the platform for the weekends and then put on a minivan for the work week. Okay, so you're jotting a note to yourself to keep an eye out for this at your local dealership while wondering what in the world this has to do with training products.

Think of the skateboard chassis as your content. It's "the thing that propels you." Think of the body kits as your end products. You can style the content any way you see fit to suit your consumer. The "skin" of the car is not what makes it go, just as the final look and feel you choose for your training product should not be what drives your training. With the skateboard, you can quickly change skins with minimal resource expense. It can be completely customized to your life situation. If you get a new pet and need more room, add an inexpensive hatchback to the skateboard.

Some years ago, a hi-fi four-head VCR with all the bells and whistles cost around $1,000.00 (and that was on sale). Today, that same VCR is $50.00 - 100.00, depending on brand. Similarly, there was a time when a malfunctioning VCR was put in the shop for repairs. Who gets a VCR repaired anymore? It's cheaper and faster simply to replace it. Why? The manufacturer designed the product for disposability. Transport mechanisms are easier to make and integrate in the first place; they are not cost-effective to repair. In the grand scheme of things, you can buy a lot of $50.00 VCRs for that $1,000.00. (Okay, 20 if you are keeping score.)

Content That Drives Success

We now have several products that have been consistently successful for us. We have a full suite of quick reference cards that detail only defined best-practices for all firmwide applications as well as many of our amenity applications. These are fully indexed and searchable with a Google appliance (soon to be an even more robust indexing engine in its place). In addition, we have all of the content available in quick reference format as well as video help.

In fact, there is a one-to-one match between topics and tasks on the quick reference cards and video topics. When a change is made to a card, the videos are immediately rerecorded, converted to Flash and placed on the Web server alongside the PDF copy of the card.

Many of the videos take us less than five minutes to produce and publish to the server. How is that possible? Because we take such care to ensure the content is exactly what is needed, targeted to the audience and as succinct as is humanly possible. Our processes are mature, so delivery of that content becomes a very short turnaround project.

Much like the VCR, our parts are no longer cost-effective to repair. Our time is better spent making new ones. We no longer create long-form manuals for our users. Instead, we present to them a catalog of disposable pieces, and we encourage them to go to our website to get the most recent, accurate information.

Analyze how much time is spent editing your training product, and consider if it's easier to replace it instead. If it's not, review your development processes. Even your "perfect" product inevitably will become antiquated. Accept it; embrace it. Better still, build its obsolescence into the design.

by Kahlee Brighton

::Dis-Orientation

Are You Overwhelming New Hires with Too Much Information?

It's your first day at the firm. As orientation begins, the HR manager hands you a stack of paperwork the size of a major metropolitan-area phone book to review and complete as soon as possible. After a quick walk around the firm, some brief introductions to new colleagues, you're escorted to training class where you're expected to learn all you'll ever need to know about the firm's computer system.

Just as you're trying to recall the names of everyone you met that morning, figure out whether you should sign up for the HMO or the PPO, and ascertain the whereabouts of space 127 in the parking garage, the IT instructor hands you even more materials to read. Over the next few hours, you're admonished to adhere to firm e-mail policies, enter your time daily, always save documents to the DMS (whatever that is) and remember that using styles properly requires more than a personal wardrobe consultant. Your eyes glaze over, and you can barely stifle the urge to scream, "Stop! This is just too much for any mere mortal to absorb at one sitting!"

If this sounds like an exaggerated scenario, take a moment to ask your newer employees if they felt overwhelmed by all the paperwork and computer instruction they received their first few days. Chances are you'll hear a resounding "Yes."

So How Much Is Too Much? Too Little? Just Right?

Philosophies differ as to how much instruction is appropriate for new employees. With the hope of providing thorough software education, some law firms have been known to give up to two solid weeks of all-day classroom instruction. At the other extreme, computer orientation may consist of a short handout and the phone number for the helpdesk. Most firms typically offer about two to three days of instruction for new secretaries and a half to a full day for attorneys and other support staff.

One concern for firms that provide instructor-led classes for new employees is they are often so eager to get people up to speed, they try to stuff every possible relevant topic into the designated time frame. Instructors end up teaching at an auctioneer's vocal pace in order to cover all the material.

New users, who can barely remember how to get to the mailroom, are quite likely to miss a lot of important data in this kind of learning situation. Plus, a hurried approach does not help build confidence in IT support services or foster a positive attitude toward continuing education.

There are better ways to quickly meet the firm's need for fully-trained employees as well as meet the employees' needs to learn and retain the information necessary to be productive in their new roles.

Get Your Act Together Ahead of Time

Advance preparation can go a long way toward minimizing the amount of orientation and class time required for new employees. HR can send out paperwork once the offer of employment is accepted. The new person reviews everything beforehand, fills out the necessary forms and returns them the first day. The HR portion of the orientation can then focus on getting the individual acquainted with firm personnel, procedures and physical surroundings.

IT also can expedite the introductory phase of computer instruction by preparing a short personalized handout that provides key information and details such as the new employee's login and temporary password, closest printer location, e-mail address, direct phone and fax numbers, a brief overview of IT policies, helpdesk services and contact information for obtaining BlackBerry devices and other equipment. New employees will find this handy desk reference especially useful in their first days on the job.

First Impressions Count

Firms often have a fairly, if not highly, customized desktop. Although most new hires will have some previous experience with computers, the level of experience can vary greatly. If someone cannot navigate the unique software and hardware environment in your firm, he or she won't be efficient.

Before new employees arrive at the firm, try to determine the learning curriculum best suited to their role so you can focus on instruction that's directly relevant. To do this most effectively, you'll also need to evaluate the new employee's abilities very quickly. A formal skills assessment tool is one option, but chances are it will be up to you to meet with the new hire, quickly ascertain his or her computer expertise and be prepared to offer the appropriate information needed to get the person started.

The tone you set for new employees' first learning sessions with IT may well determine how much confidence they have in the department thereafter. Well before the first class, make sure all the equipment you'll need (computer, projector, etc.) is operational and current with the latest image, service packs, updates, etc. When class day arrives, be on time and ready to go with your presentation and handouts.

Keep Birds of a Feather Together

Given the disparity among users' prior PC experience, lumping a group of random people into a formal class can really get things off on the wrong foot. Just imagine an attorney who does nothing but dictate her work having to sit in a new employee class with an experienced word processor; or the transactional secretary who has to sit through instruction on preparing pleading captions and tables of authorities. And you can practically guarantee any shareholder will walk out in a nanosecond if you launch into a discussion on the finer points of ordering file folder labels from the records department.

So how do you successfully tailor each newbie's learning experience? If you have several new hires at once, try to teach those with similar positions in the same training group, *e.g.*, train timekeepers with other timekeepers. Of course, it's not always possible to have separate classes given time constraints, logistics and the number of trainers available. To the extent there is common ground, however, try to cover those topics that are important to the whole group during the classroom sessions, and then provide individual instruction or blended learning solutions for the rest.

Effective Instruction for New Legal Eagles

New attorneys, especially partners, are always difficult to corral for computer orientations, so giving them personal, one-on-one instruction tends to work best. Here are some suggestions for getting new attorneys up and running on their computers:

Coordinate with HR to contact attorneys in advance of their arrival. Introduce yourself and tell them you'd like to schedule a one-hour appointment their first day to help them log in, set their passwords, access their e-mail and provide any other instruction they may need to get started. If possible, ask a few questions that will help determine the attorneys' skills so you'll have a better sense of how much additional time you might need to work with them as well as how receptive they will be to computer education in general.

During the first day appointment, briefly acquaint the attorneys with their PC desktops, billing programs, Outlook or other e-mail applications and note custom features such as macros/templates in Word. (If your demo is successful, they may well ask for more instruction at this point.) Also, talk to them about what the helpdesk and the IT department can do to support them, especially during their first few weeks.

Quickly survey their tech needs. Do they do their own documents or dictate everything? Do they need BlackBerry devices? Do they want to work remotely from home? Secretaries often know best in which areas of technology their attorneys could use some extra learning support. Contact those who will be supporting the new attorneys to get additional information.

Based on the information you get, schedule additional time to meet with the new attorneys to go over more features and answer questions that might come up. These can be very quick sessions to address items of greatest concern. Don't push too hard for compliance; simply extend the invitation and be sure to follow up. Attorneys often will request additional instruction once they figure out what else they need to know to function in your technology environment.

Follow up with the attorneys at regular intervals. You can promote class offerings and offer to answer any questions.

Time literally is money for law firms, and new attorneys will want to jump into billable activities right away. If you can provide real value for the time they invest in education those first few days, they will be much more likely to request additional instruction or attend future classes.

Keep Classes Short and Focus on Fundamentals

Essential newbie know-how should include best practices for getting around the firm's computer system and accessing key information on the intranet. Concentrate your initial instruction on productivity-oriented software applications such as those used for billing, e-mail and creating, saving and locating documents. Infrequently used applications such as those for litigation support, forms creation, e-filing, contacts and records management, and conflict checking, should be addressed in mini-courses in the weeks that follow.

To maximize retention, try to spread out your new employee instruction over a few days and keep classes relatively short. Users will appreciate having time at their desks to put the lessons into practice.

Blended learning options are very effective in encouraging newly hired employees to embrace technology. Crucial material should be presented in person whenever possible, but a lot of helpful information can be covered in recorded webinars, tutorials or short videos posted on the firm's intranet. These can supplement and reinforce what's taught in class and, most importantly, help employees review and retain information that will be most essential to achieving a high level of productivity and success in their new positions.

Leverage Additional Firm Resources

Learning support doesn't have to stop when the user leaves the classroom. In addition to blended learning options, there are other ways to assist new employees while they're getting acclimated:

Let the word processing department handle complex documents and new matter requests while the employee gets up to speed. No one should be required to know how to run the firm's customized TOA macros, open new matters or run extensive conflict checks the very first week.

Teach new hires how to use online help menus and work with the helpdesk. Many employees refuse to use the help function in an application, and it is often simply because they've never learned how to use this tool effectively. A few minutes of instruction can help users quickly answer their own questions and gain significantly more independence. Although not a substitute for classroom or individual instruction, the helpdesk also can be a wonderful "how to" learning resource for new employees.

Use a mentor or the "buddy system." It's common practice for new attorneys to be mentored by those within their department. The same strategy can work for new secretaries and support staff as well. Assign someone who holds a similar position and works in the same general vicinity to mentor a new employee by answering basic questions and offering assistance as needed.

Schedule additional class time to go over more advanced tasks that initially were left out for the sake of brevity. Give the new employee a call after the first few days and ask how it's going. If you utilize formal learning plans or a professional development program, make sure to stick to it and follow up to ensure compliance. Even if your learning approach is less formal, call or stop by every week. Once new employees have a chance to get comfortable with their new roles, they'll be better able to ask relevant questions and understand how to leverage the firm's technology to full effect.

Post helpful tips for newbies on the intranet or distribute them in brief e-mail messages. Walk the floors and make "house calls." Consider offering an informal weekly Q&A workshop. Hang out in the training room for a prescribed time, and let folks make appointments or even drop in with questions. This keeps the instructor visible and reminds them support is always available.

Ensure management is on board. Having the support of management is key to the success of educational endeavors in any law firm. It can be a challenge to get people back in the classroom, but it will be much easier if HR encourages — even insists — on continuing education.

A Good Beginning Builds Lasting Results

Instruction for new employees will be, of necessity, constantly evolving to meet the needs of the firm as well as current hardware and software requirements. Coordinating your efforts with HR to develop expedient orientation strategies and introductory courses adaptable to the skill levels, positions and responsibilities of those joining your firm will help build a high level of enthusiasm for your ongoing learning program.

::A Roadmap for Educating Attorneys

Outside the Classroom

by Michelle Spencer of Bracewell & Giuliani LLP
and Tami Schiller of Jackson Walker L.L.P.

In the past, the challenge in providing software education for law firms was how to get attorneys involved outside the classroom in order to lead them into it. But the destination here is to obviate the need for attorneys to be in a classroom at all. Let's consider some new approaches to coaching attorneys by taking an adventure down the learning highway.

Basic Rules of the Road

We came up with four essential "Rules of the Road" based on what worked and what didn't with respect to several key project scenarios at our firms:

Rule One, "Identify the issue." Pick a destination for your journey. When you know what issues need to be addressed or what goals or solutions you're trying to accomplish with your learning tasks, you can focus your energy on the processes that will best allow you to reach your target audience.

Rule Two, "Develop a plan." When you're heading to an unfamiliar destination, how many of you go online to find a map and driving directions? Planning your adventure in advance allows you to select the most appropriate route, and it helps you to manage detours and road blocks you may encounter. Apply that same thought process to training and supporting your different learning audiences. Being prepared allows you to manage the unexpected with confidence.

Rule Three, "Communicate and set expectations." Prepare your itinerary and share it with the participants. It's important for you and your students to know what is expected. Ensure everyone understands the ultimate goal and the process you'll be following to reach it. After all, what would happen if you set out on your journey and the bus turned east when your travel partners expected it to turn west? No one's expectations would be met, and the trip would be a disappointment. Keep your focus on the learners. Where do the attorneys want to go?

Rule Four, "Train just enough." See the sights, but don't try to pack in too many at a time. If you know where you're going, plan accordingly and share that plan. This step should define itself. Take your knowledge of the technology and match it up with the steps derived from the itinerary upon which everyone agrees. Your trip will have a better chance at success because both you and the learner have agreed on what is to be learned and the route you'll be taking to reach your learning goal.

Different Kinds of Routes to Consider

Here are some learning scenarios addressed using the road trip analogy and applying the foregoing Rules of the Road:

The Sunday Drive

While the Sunday drive is a very informal approach to attorney training, it is generally the most common way we train our attorneys. Even the most casual of training scenarios can be more successful when you follow the four rules.

Plan a drive and pick up the attorneys along the way:

Identify the issue. In this instance, two secretaries were going crazy with directly-formatted forms and documents that had been converted from WordPerfect. Both they and their attorneys were frustrated with these problem documents.

Develop a plan. The secretaries put their heads together and modified the team's forms to include automatic numbering, tables of contents and cross references.

Communicate and set expectations. After the forms were completed, they told the attorneys and explained the goal.

Train just enough. The attorneys were trained on a few specific Word tools that would make it easy to meet the goals. Once they were shown the Normal View, had the basics of styles explained to them, learned how to use the Styles drop-down and understood how to update tables of content and cross references, they were on board. They also knew if they created a document based on their forms, it would be a "healthy document," one they could work on even when their secretaries were not around. Did they know everything about styles? No. Did they need to? No.

Traveling with Friends

Taking people along on the journey can make it fun or more demanding, but collaboration always has its challenges.

Identify the issue. A request was received from the head of the corporate practice group to clean up their forms.

Develop a plan. We met with the attorneys in the group to plan and discuss their objectives. Then, we met with Word Processing and IT to plan the process for cleaning up the forms.

Communicate and set expectations. We demonstrated and discussed options with the group on how to handle the forms and public folders in the DMS for storing their forms.

Train just enough. We met with the group (including staff) and began training using the first batch of new forms, including instruction on where and how to find their forms, since searching in the document management system was one of their frustrations. The staff was given additional training on the more advanced automation features used, and we repeatedly met with the attorneys until all forms were complete. The training continued in small segments for several months. At the end of the project, IT was asked to continue coming to one practice group meeting each month to share information about upcoming projects, training or other information.

The Formal Road Trip

A formal road trip is more defined, requires more processes, and additional planning is needed up front before starting out on the journey.

Identify the issue. Bring matter-centric document management into the firm culture.

Develop a plan. We determined it would take four meetings with each practice group and department to develop their worksite templates. We asked the group and the department heads when we might get on the agenda for one of their regular group meetings.

Communicate and set expectations. At the first meeting, we discussed the matter-centric concept, purpose, goals and process with each group. We also demonstrated the software. We then attended several more meetings during the project to draft each group's worksite templates, to demonstrate and revise the draft worksites and, finally, to approve the worksites.

Train just enough. Classroom training was customized for each practice group using their specific worksite templates in order to make it more meaningful to them. Because they had been involved in the process from the beginning, they took ownership of the project.

The Complete Travel Package

In approaching a firmwide initiative, consider yourself a travel agent. In this case study, you're going to select the destination, plan the trip and package it in a way that will entice your firm to take the trip you've planned. Because this example was a large project, some of the steps in the process had to be broken down into smaller more manageable phases, and you'll be able to identify those as you work through your own plan.

Identify the issue. While we recognized that our learning audience had evolved in the past few years and more attorneys were using technology, it was the attorneys who were telling us we needed to understand how they worked within their practice. We took that insight and presented a plan for practice-specific training and support for our attorneys. Because it was a different audience with different experience, needs and time constraints, we wanted to move our instruction out of the classroom and deliver targeted training focused on workflow and processes.

Develop a plan. Because we took our time to plan for this trip, we knew we needed help from expert tour guides. We partnered with a consulting company and customized a program they already had in place. We wanted to move toward consulting and coaching where the learner would control the training. We use trainers as consultants to discover core competencies and workflows to map and target the training to those areas and deliver the training in the individual's preferred learning method. Our relationship with the tour guide was one of discovering if this particular trip would be successful in our firm culture.

Would the skills each practice group identified as important be different from the skills that IT identified as important? Could we learn enough to align training to the business process?

We selected a small and manageable practice group as a starting point and approached the process in phases. The analysis phase included a great deal of research. We initially looked at IT metrics such as document formatting and helpdesk logs. Subsequently, we moved beyond technology criteria and looked at published professional development metrics. Do you have a procedural source book or published benchmarks?

The next phase challenged our communication skills. We talked to people from the practice group. This phase is interesting because it takes what you learned from your research and allows you to see how it relates to what you learn when you are talking to people. We were pleased our attorneys had a lot to share when we took the time to listen to their needs.

Communicate and set expectations. What are you going to do with the information you've gathered? For this case study, it was important that the analysis and findings met the needs and expectations of firm management and, most importantly, the practice group leaders. This can be communicated by a formal meeting or a written analysis. For this project, we wanted that buy-in before we made changes to our training approach.

Train just enough. We will take this information to train new hires and existing practice group members on the core competencies or skills and workflows identified during the project and remove it from the training outlines for applications and features they are not using.

Signs Along the Way

The Rules of the Road are based on what we learned during our various projects. Continuing with the roadtrip theme, we've chosen to use road signs to represent specific challenges and potential hazards to watch for along your own journey. After all, you wouldn't get very far on any trip if you didn't pay attention to the signs.

Billboards. Advertise your successes to other groups and attorneys. In two of the examples we've shared, word spread through the firm about the positive collaborative experience. Subsequently, we had additional requests from other practice groups.

Carpool Lane. Instead of taking people away from their desks, get on a regular group meeting agenda. Try to book the first ten minutes of weekly attorney meetings. If you keep focused, you can cover a good bit of ground in ten minutes.

Cattle Crossing. Be aware of group dynamics. Don't get sidetracked by disrupters; there is one in every group. This is one of those times when you have to take charge and keep the herd moving forward.

Construction Zone Ahead. Define the purpose and expectations up front. In the matter-centric project shared earlier, the attorneys were told at the first meeting there would be four meetings to design their templates leading up to the rollout and classroom training.

Detour. No matter how much you plan and communicate the plan, at times you'll have to detour around obstacles. In the travel package interview process, there was a set of prepared questions, but the attorneys would sometimes depart and share valuable information outside the scope of the questions. Still, having the agenda in hand allowed the interviewer a way to return to the intended path.

Falling Rocks. Be prepared to have unexpected time demands drop out of the sky once you get the ball rolling. In our experiences, every project takes more time than initially allotted.

Fasten Seatbelts. Be honest and upfront about what to expect. In one of the corporate forms projects, we found we would not be able to give immediate turnaround due to the volume of forms involved and our word processors' workload. If we hadn't let the attorneys know this up front, it could have derailed the whole project.

Hidden Driveway. Watch out for hidden agendas. There will be times in group meetings or private conversations when someone will have their own purpose for wanting to speak with you. In a group setting, get back on track quickly. In private, stay professional and don't engage in gossip or negative talk.

Information Here. Set out to understand their needs. To get started, ask the question, "Does this solve any problem he or she cares about?" After all, how are you ever going to pick a destination if you don't talk to your fellow travelers?

Intersection of Carrot Way and Stick Drive. If classroom training is absolutely necessary, there are two approaches to getting attorneys there. One is the carrot (*e.g.*, CLE credit, memory stick giveaways, etc.). The other is the stick (*e.g.*, mandatory attendance per firm management, peer pressure). If others in the practice group are motivated, they can inspire their colleagues to attend.

No Loitering. Take up as little of their time as possible. Be prepared, and be succinct at meetings. Attorneys will appreciate this more than you know.

No Parking. Set specific goals and deadlines for yourself as well as attorneys and staff involved. It's helpful to get on their calendars as early as possible to avoid delays.

Obey Flagman on Duty. Don't be afraid to take charge. Referring back to the matter-centric project, there were times when a group's idea of a practice group worksite just wouldn't work with the limitations of the software, and we had to step in and redirect them.

Open Trenches. Get out and talk to people face-to-face. Find some heroes with success or horror stories, and use their stories to either create the training or build intrigue for it.

Railroad Crossing. Provide different types of training for different types of users. As you'll discover when you put these steps into practice, what you are doing is aligning your skills and knowledge to deliver just the pieces and parts the individual needs for his or her learning track. It's important to recognize that each learner is different. Don't get derailed by trying to make a senior partner a Word formatting expert when he or she only uses e-mail. Focus on making them proficient and efficient with their e-mail.

Recycle. Once you get rolling down the road, you will need to recycle your materials, so you can keep up with time demands. Materials can be tweaked to match different projects or group needs, so that you don't have to start from scratch each time.

Serious Learners Only Beyond This Point. Only use classroom training when absolutely necessary. If you're following what we've been suggesting, it will become less necessary. E-learning is an excellent alternative to dragging them into the classroom.

Slippery When Wet. Get to know attorneys' territories, and find a need or problem that they have in order to create training to which they will respond. One of the reasons the corporate forms clean-up project came about was because attorneys were frustrated when trying to work in their documents at night and on the weekends.

Survey Crew. If you are doing a survey, you must remember to be professional and objective during the interviews. Don't take the criticism personally or you will lose your impartiality. Resist the temptation to fix the problem right then. Your purpose is to find their viewpoint and gather data.

Yield. Realize you are competing with billable hours and numerous other time demands on attorneys. The classroom should be your last resort, and please don't focus on buttons and features. Focus on the processes they use and modify your session to those needs.

Reaching Your Destination at Last

If you follow this roadmap, you will build good will for training, and it will be seen less as a cost center and more as a critical service. Don't forget to obey the signs and follow the rules of the road along the way. Sharing this information about the detours and barricades that we've experienced will make your own journeys much smoother.

by Heather Morrow of Loeb & Loeb LLP

:: Just-in-Time Learning

What's in It for Them?

Training, whether traditional or just-in-time, must address what motivates adult learners to take what we are teaching them and apply it to their everyday lives. For the most part, adults are motivated to learn when the training will help provide job security or recognition such as a promotion or salary increase. So when designing any kind of training plan, you have to ask "What's in it for them?"

Since the proliferation of computer programs, technical trainers have focused training efforts on teaching the user everything there is to know about how to use the applications. With the best of intentions, we handed the end users manuals big enough to sink the Titanic and pulled them into the classroom for intensive week-long sessions only to discover that it was rare for them to retain more than just a fraction of the information we covered.

I soon saw that after about an hour in the classroom, most attendees started getting the "glazed over" look. So, I started dividing the days of training into hour topics and held "Lunch & Learns." Perhaps with food and shorter sessions, the information would sink in. Maybe, just maybe, they'd learn not to double-click on absolutely everything and remember that right-click offered them a lot of different options. Still, I had to cover the same topics over and over again.

What I finally realized was a fundamental principle of adult learning and an essential element in the success of any training program: People are more likely to retain information that is relevant and useful to them in their jobs.

Just-in-Time Training

Many are familiar with the old Chinese proverb, "Give a man a fish; you have fed him for today. Teach a man to fish; and you have fed him for a lifetime." But let's say you try to teach a man to fish when he's sitting at a desk in an office. By the time he gets over to the pond to fish, he will have forgotten half of what you told him. Now, if you teach the man to fish at the pond, and he comes back to fish in the pond for a few days in a row, he might be able to fish the rest of his life. But, what if that pond dries up? Can he take those same skills to the river? The answer is "yes," because he received just-in-time training at the pond and learned and reinforced the skills enough to graduate to fishing in the river.

What does fishing have to do with teaching computer software? Everything! It might be a leap, but you have to think of software as the pond and the functions within the software as the tools we use to fish in that pond.

Training Must Evolve

In an article titled "*The Learning Matrix—Just-in-Time Learning*," Massood Zarrabian references a well-known movie and how it provides a great futuristic example of just-in-time learning.

In the popular movie "*The Matrix*," there is a scene where two of the characters, Trinity and Neo, are looking at an empty M-109 military helicopter on a rooftop. When asked if she can fly it, Trinity replies, "Not yet," and immediately makes a call from her cell phone to obtain the necessary pilot training program. Moments later, all of the necessary information surges into her brain, and the two take off.

The fact is that in all industries, not just legal, job lines are blurring and jobs are evolving to meet the needs of an organization. Technology is really driving this shift, and we have to be nimble enough to change with the technology. For example, the ink is barely dry on my handouts before the next upgrade is rolled out, and I have to start revising them. As jobs evolve, the associated training must also change to meet consumers' needs.

Just-in-Time Tools

Technology has provided many tools that can now be used to deliver just-in-time training to users, and they range from tools that take screen shots to tools that allow you to record and assess the mouse movement. With this broad range of tools, it is possible to accommodate the many ways learners take in and retain information. The **Visual Learners** will need to have all the manuals, quick tips and take notes on every word you say. The **Auditory Learners** will want you to talk them through the steps and then discuss the steps with you. Finally, the **Kinesthetic Learners**, who learn best by doing, will be off and running ahead of you as you demonstrate a new application.

The following information touches on the tools I am using in my training program at this time, but I have great plans as we launch Loeb University in the next couple of months.

Internet Research

Most of my user community has seen Google (it's the default Home page in Internet Explorer) and done a search or two. However, when I get a chance, I try to show them how they can use Google or other search engines to find information on things they might need to know immediately. Although this might not provide the more comprehensive training I want them to have, it will provide them some piece of information upon which I can build.

For example, if they search for "printing calendar from Outlook," one link takes them to a Microsoft site with step-by-step instructions on how to create and print a blank calendar from Outlook. Sitting down with staff and showing them how to conduct an effective search helps them build independence and learn that the answers or instruction they need may be at their fingertips.

Training Tips

Over the years, I have sent out many concise training tips. A good example is the very topic mentioned above, "printing a calendar from Outlook." Even though I have sent a training tip on this topic to the users, the information may not have been relevant to them at the moment they received the tip. I have discovered that I can repeat the tips, as what users might delete today as not relevant to their jobs, they might receive in three months as "just-in-time" instruction and be able to use and retain. When this happens, it is rewarding to receive the phone call or e-mail message noting how helpful the tip was to the learner.

Evolving Instructional Media

IKEA has mastered the print version of just-in-time training. Each part is labeled and all of the tools you will need are provided with step-by-step instructions to build your own furniture. Their instructions are so simple that you cannot go wrong in assembling what you have purchased. Could you imagine your car coming in a box with an assembly instruction manual?

Speaking of car manuals, mine stayed hermetically sealed in the glove box for many years. A few months ago, I had a flat tire, and the AAA Roadside Assistance operator asked me if I knew where my spare tire was. I had to admit that I had no clue, and while I waited, I unsealed the manual and used the table of contents to find the section on changing the tire. In the time I waited for the roadside assistance, I gave myself just-in-time training on changing a tire but chose to let the tow-truck driver handle it.

In both examples, the training manuals provided just-in-time training. While I am sure there are people out there who read all manuals from front to back, most consumers want them for reference and open them only in those "moments" in which they need the information.

For that reason, I have worked very hard in my training program to get rid of the manuals and provide users with simple, quick reference sheets they can use at the moment they need them. I try to keep each sheet to one page, one side and use numbered steps and screen shots. Like IKEA, I believe a picture is worth a thousand words.

Webinars

In the past several months, we have been using Live Meeting to facilitate just-in-time training for our user community. Each 10- to 15-minute webinar session is geared toward the busy attorney who wants to be more self-sufficient using the computer and doesn't have an hour to spend in the training room.

I make every effort to start and end these sessions in the time frame stated. One of my most popular sessions is "Safe Pasting to Maintain a Healthy Document," so I offer it on a regular basis. The more users see these quick opportunities to learn, the more they ask for training on other topics.

One-on-One Training

Customizing sessions to meet the needs of the learner can be very effective training. I have several attorneys who call me once a month to go through a list of items they have questions about. In these sessions, a student will occasionally teach me something I didn't know about an application. These are exciting moments, and I thank the user profusely. I then pass the tip onto other users. I prefer having these personal coaching sessions in the moment of need, however, because just-in-time training is more likely to be retained.

Web-Based Training

As I mentioned earlier, we are just getting ready to launch Loeb University, and I have begun scratching the surface of developing Web-based training. As with writing training manuals, this information can quickly become outdated. However, with the success of the webinars, I will try to find small topics for Web-based training in which the skills learned can translate past the application users are learning.

Empowering Those Around You

I continually work with our helpdesk to provide just-in-time training. If someone calls with a question that it is not a technical issue, the call often provides an excellent training opportunity. I encourage our helpdesk staff to always try to find a way to extend the teaching moment and provide callers with additional information regarding the topics they want to address. If the call is escalated to me, I educate both the helpdesk and the user.

Finding the Just-in-Time Moment

Don't hesitate to take advantage of just-in-time training moments that fall into your lap. A secretary recently called me because her attorney's information was not coming into the letterhead properly. In the process of fixing this problem, I had the opportunity to talk to the attorney. As I'm chatting with him about the weather and his letterhead, he asks me if we use styles at Loeb, which of course we do. I then explained the style collections, which led to a conversation on outline numbering, which led to a conversation on customizing a numbering scheme. A small fix to his letterhead led to a 20-minute just-in-time training session. I will, of course, follow up with him to make sure it translated into the work he is doing on a regular basis.

Developing Just-in-Time Materials

It is important to remember that what we might find easy, others may struggle with, and finding a way to relate it to what they are doing will make the training easier and more effective. Ask yourself, what is one computer skill you have that you would never part with? Build a short just-in-time training module around this skill. Ask those around you the same question.

Then ask your users, "What skill would you like to learn or improve to make your job easier?" Since users' skill sets can vary dramatically, you may be surprised by some of the answers. One person in a group I taught said, "Versioning." I was able to teach him this skill in a just-in-time moment.

Many users don't want to admit they don't know something, so use a gentle approach when asking about their training needs.

Training Wheels

Learning how to use a software program is just like riding a bike. You never forget how to ride. What we do forget is that we didn't start off riding. We started with a tricycle and then graduated with some coaching to the bike with training wheels. Then we learned the delicate balance of being up on two tires. Some of us advanced to doing tricks, but most of us learned enough to get back on a bike and ride without going back to the tricycle or training wheels.

As technical trainers, we have to provide our user community with training wheels, so they can find their balance and some day ride on their own. And, hopefully with the just-in-time training, they can evolve as quickly as the software we are rolling out to them.

Use the just-in-time moments wisely. Start simple, keep it simple, and always remember to ask yourself, "What's in it for them?"

ABOUT ILTA'S USER SUPPORT PEER GROUP

ILTA's User Support Peer Group includes user support practitioners in law firms, corporate and government law departments, and other law-related organizations. The goal of the group is to provide an efficient way to meet peers, exchange ideas and generally further user support development among the group. Membership benefits include development and networking via participation in a user support-focused e-group, periodic webinars, white papers and ILTA's annual conference.

by Maritta Terrell of Lloyd Gosselink Blevins Rochelle & Townsend, P.C.

::Cultivating Your Skills on the Helpdesk

Running an effective helpdesk is much like growing a garden. Gardening can be a fun and relaxing activity, full of positive, happy emotions. As a helpdesk person, I'm a lot like a gardener. At work, I'm a sower of seeds, cultivator, horticulturalist, landscaper, weed puller and harvester. In this way, I can keep a perspective on what I do and see it as growing something worthwhile. I have a firm mission and goals to achieve and a handy pouch full of troubleshooting techniques.

As a gardener at work, how do I plant seeds in users' minds about the value of the helpdesk, germinate successes and accomplishments and nurture effective use of technology? I walk around the two floors of our office at least four times a week. Just saying hello to people evokes comments, "Oh, while you're here, could you help me with…?" and "Thanks for asking! Yes, do you know how I can….?" Sowing seeds of willing helpfulness helps grow a garden worth harvesting.

As a cultivator, I encourage people to ask for help, then, I handle their requests. Since I'm often the primary link for users to other sections of IT and firm management, I'm also working to promote good will among all three groups. Fostering good will is just as important as being able to help with the technical issues. The helpdesk is a great resource for nurturing communication as well as gathering information and knowledge.

A horticulturalist is someone who specializes in a certain area of gardening, and the same goes for the helpdesk specialists. We have to remain up-to-date on supported technology, get the right training at the right time, attend seminars, join user groups, read trade magazines, visit websites to stay current and work with co-workers to garner more information and knowledge. If you are managing helpdesk personnel, make sure your technicians have these opportunities.

As a helpdesk specialist, I have the opportunity to landscape customer service at my firm. I do that by reacting positively to any problems, even when expressed as grumbling, frustration, negative and emotional behavior. I try to look at each and every user as an opportunity to grow in knowledge. By responding positively in every situation, it helps calm the frustrated user and builds up affirmative morale at the firm.

It also helps keep me calmer and enables me to stay focused. What an opportunity for input and influence! The user may not remember six months from now whether you were able to help with the problem, but they will remember how you made them feel. It seems illogical and certainly nontechnical to say that being a helpdesk person means providing emotional support for the user as well as technical support. Still, it goes with the territory.

I also get to vent my own frustrations by pulling up the weeds I find. Typically, these errant plant species are the problems that beset the users. It's a fun challenge to find the reason for a helpdesk call, figure out the problem and provide an appropriate answer, thus removing the weed. And by recording the kinds of "weeds" encountered, I can work to eradicate future incidents by watching for trends and providing training.

It's a joyful experience to harvest the fruits of my gardening efforts. These include such things as praise and good will in the firm. Of course, bonuses and pay raises are a nice bounty as well. However, harvesting the positive morale and seeing users become proactive in wanting to learn more makes going to work a lot more fun.

How We Make Our Garden Grow

Having a mission statement, goals and other guidelines in place gives us a set of procedures to follow. As a result, we know how to handle different types of support calls.

Mission Statement. A mission statement answers the "why" and the "where" of having a helpdesk. Here's an example: "The mission of the firm's helpdesk is to provide users with assistance and answers pertaining to the most common software packages, as well as other technology and hardware at the firm."

Goals. Goals are different from a mission statement; they are much more specific as to what the objectives are for each helpdesk person. The goal should give an answer as to how, to whom, about what and when to provide answers. Here's another example: "The goals of the firm's helpdesk will be to provide timely and efficient answers to users concerning software programs and provide assistance with hardware problems in a positive and helpful manner."

Helpdesk Personnel Skills. A helpdesk person should have strong software knowledge, excellent communication skills to share that knowledge, great listening skills (which involves patience), a calm, confident demeanor and law firm experience (helpful, but not necessary).

Learning to Listen. My IT manager once told me, "The experience of feeling understood is like psychological oxygen. Without having it, nothing that someone else is saying seems very important." That statement is so helpful. Listen to your callers. If you need help in learning how to listen, take a seminar on it and practice. At my firm, when a call comes in, I respond, "Helpdesk. This is Maritta. How can I help you?" I give my total attention to the call and smile. Believe it or not, people can tell if you are smiling at the other end of the phone. I listen for the main idea, filtering out the user's frustration and respond to the problem, not the emotion. I try to be the person who can come to their rescue.

Dealing with Anger and Frustration. When a user is upset, one of the best ways to handle them is to respond immediately (preferably in person), with patience and again, listen. If someone feels that you are truly listening and hearing their emotions, as well as their technical troubles, they're much more likely to respond to the solutions you provide.

To say "I understand" is not enough. People need some sort of evidence or proof of understanding. Prove your understanding by occasionally restating the gist of their idea or by asking a question which proves you know the main idea. The important point is to repeat what they've said — not to prove you were listening but to prove you understand. Active listening means giving your full attention on the person who is speaking. Don't look out the window or at what else is going on in the room.

Here are some specific techniques I use for handling an angry user:

Prepare myself by sitting up straight, putting a smile on my face and taking a deep breath.

Let them vent their anger and frustration, and I don't interrupt them until they are done.

Listen and take notes. It really forces me to listen better, and I can refer back to my notes later in my conversation with them.

Repeat their central message, word for word, so I can correctly identify the problem. When I repeat the problem in their own words, it forces them to agree with me or restate their problem in a clearer fashion.

Ask what they want done to solve the problem, then work on an action plan with them.

Ensure they are completely finished before I leave and that they understand the solution we have developed together.

I'm certain there are users with unrealistic expectations in a few law firms. They can be demanding, forceful and may want something that the IT department can or cannot provide. As with frustrated users, I repeat or paraphrase their message and ask questions to make sure I understand where they are coming from, what their needs are and determine the key points of their request. What I need to remember is not to take anything personally. They are not frustrated at me but at the situation. If their expectation is truly unrealistic, I tell them how it is (*e.g.*, with respect to cost, etc.) and then show them realistic alternatives already available at the firm.

Here are some of the "magic phrases" that have been very useful.

Thank you for calling

I hear you saying…

Can I help you?

So you are trying to….?

Can you expand on that?

I understand you are trying to…

Call the helpdesk any time and we'll be glad to assist you.

Tracking the Landscape of Issues

As helpdesk personnel, we log each call in our database program, tracking the user, time and date of the request or question and the solution. This provides us with the opportunity to see who uses the helpdesk, what types of questions are repeated, whether there are more hardware issues than software with various people (and thus types of computers, etc.), and so forth. And if one helpdesk person gets a question for which they don't know the answer, they can search the database and have the answer almost immediately. I certainly can't remember everything (though some of the users think I can), and the helpdesk database has the answers to the various helpdesk questions I've encountered.

Reaping the Harvest of Your Helpdesk Garden

The helpdesk is a great service to the users. They are our customers and our garden. Go out and become a great gardener. Plant your seeds, cultivate, landscape, learn and gather a huge bounty of learning, good will, knowledge and encouragement!

About the Authors

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