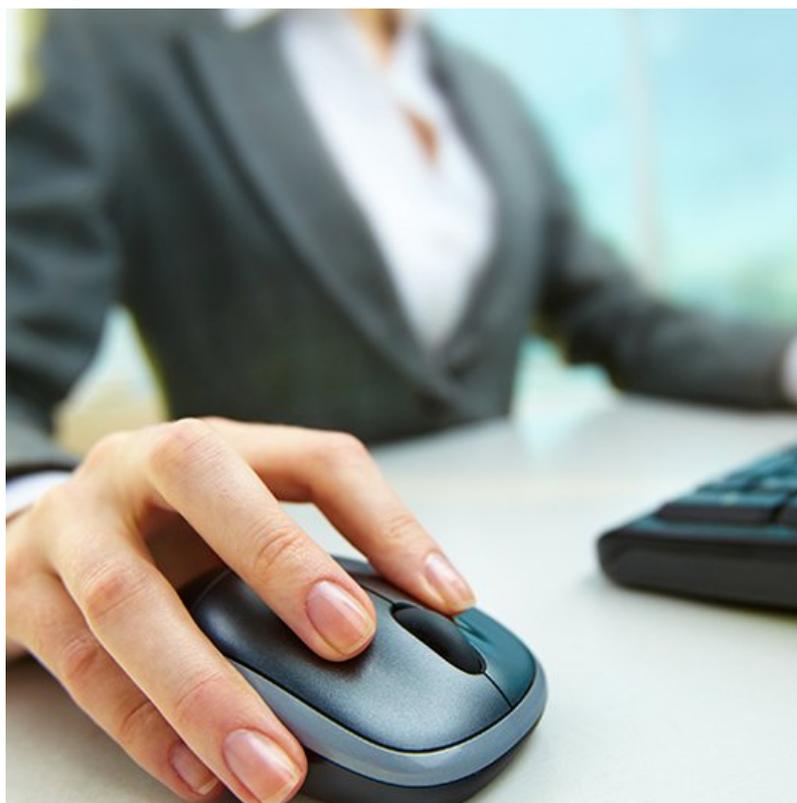


# LEGAL MANAGEMENT

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## Creating Culture Change: How One Firm Made Technology Training a Priority

By Doug Striker



Recently, I was speaking with a colleague who provides contract technology training services to law firms, similar to my company. She told me about a year-long experience that she had with a firm, and it was so universally applicable that I thought I might share it as a case study.

### THE QUANDARY

My colleague, we'll call her Leigh, was working for a mid-size law firm, which we'll call The Firm. She had been delivering technology training for several years and was growing frustrated because she was teaching the same things over and over, with very little to show in the way of improvements.

The Firm was approaching technology training from a one-size-fits-all perspective, delivering content to all staff and attorneys with a broad brushstroke. For example, people with advanced skills had to sit through remedial content just to say that they had attended training, which was required.

Further, Leigh faced significant pushback from attorneys who felt that they were too busy for training and, therefore, so were their staff. They didn't support their staff members' efforts to complete the training, contributing further to a culture of apathy and resentment.

Leigh knew how to fix the problem, but the efforts required a complete culture shift, starting with The Firm's chief operating officer (COO).

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### THE CULTURE SHIFT

First, Leigh approached the COO with her plan, which included the following:

- **Form a technology committee.** This committee would include representatives from across The Firm to help design and launch a new training initiative.
- **Administer individualized assessments.** Leigh believed that the key to removing apathy was to tailor instruction to each person's skill level. To do this, she needed to first assess them individually.
- **Increase attorney participation.** The committee and assessments would be used to encourage attorney participation, helping them to understand the impact that improved technology efficiency would have on their workflow and output.
- **Create customized training.** Using the assessments, Leigh would spend several months creating customized content for more tailored training. Often, people could complete their training while sitting at their own desk rather than having to attend a class. This improved efficiency of the training efforts.
- **Award certifications.** People who had achieved various levels of technology proficiency would receive certifications for their accomplishments. (These certifications could ultimately be used by the marketing department to tout The Firm's technological advantages.)

Upon hearing Leigh's plan, the COO jumped on board, and the efforts began in earnest. This was a critical piece of Leigh's plan — she needed The Firm's management team's buy-in from the beginning, or her efforts were doomed.

## THE RESULTS

After nearly a year of planning, Leigh and the COO were ready to launch the new training program. They started with a party at The Firm, which ultimately was poorly attended. Looking back, Leigh wishes that she had asked the COO to commit more resources to the program launch, perhaps taking everyone off-site for a bowling party or other fun event so that the importance of the new training program could stand in startling contrast to the "old ways."

Yet, the program was quickly successful and resulted in a complete culture shift at the firm. People are more engaged because:

- Training is customized, so no one's time is wasted.
- Courses are often delivered right to a person's desk rather than in a classroom.
- Certificates prove that a person takes efficiency seriously. (These certificates are impressive to clients, as well.)
- Attorneys can utilize their technology capabilities in their efforts to recruit new clients. ("I am not only a great legal mind, but I possess state-of-the-art technical skills, assuring that I never waste your time.")

On a more tangible level:

- Calls to the help desk decreased by 75 percent.
- Staff and attorneys went from 30 percent technology proficiency to 60 percent proficiency. After more training, some even went to a 90 percent proficiency.

## THE NEXT STEP

Leigh is thrilled with the results and now sees additional ways that she can take The Firm to the next level. She will work with them to achieve Legal Technology Core Competencies Certification Coalition (LTC4) certification. This will enable The Firm to position itself as a cutting-edge law firm where clients can expect that all of the attorneys and their staff work seamlessly across all available technology platforms. This level of efficiency will not only improve the firm's ability to achieve client goals, but also will increase profitability.

Leigh's efforts show the value that a good technology trainer can bring to an organization. They also prove that creating a culture shift requires critical thinking and an honest conversation about what's not working. Success requires planning and time.

## ABOUT THE AUTHOR

**Doug Striker** is Chief Executive Officer of Savvy Training & Consulting, a provider of legal software training solutions. As a former Chief Operating Officer of a prominent law firm, he specializes in helping firms acquire the software platforms they need, training staff for maximum workflow efficiency, and enhancing continuity and bottom-line results.

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