

i/TA 2011 rev-elation

## Technology Coaching for Attorneys: What Works?

August 24, 2011

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## Agenda

- Introductions
- Program Profiles
- Prescription for Success
- Lessons Learned
- Case Studies and Resources

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**Sharon Ford**  
IS Coach  
Sidley Austin LLP

### Program Profile

- **Firm Size:** 1700 attorneys
- **Coaching Staff:** 2 coaches; trainers in smaller offices offered informal coaching as well
- **Program Participants:** 10 – 12 participants per coach per cycle
- **Program Launch:** 2001

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**Carol Gerber**  
Former Director of Learning & Professional Development  
Moses & Singer LLP

**Program Profile**

- **Firm Size:** 100 attorneys
- **Coaching Staff:** 1
- **Program Participants:** 24 training sessions delivered
- **Program Launch:** Ran from October 2008 to March 2010

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**Jan Huber**  
User Services Manager  
Baker & Daniels LLP

**Program Profile**

- **Firm Size:** 370 attorneys
- **Coaching Staff:** 3
- **Program Participants:** 51 to Date
- **Program Launch:** 2010

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**Julia Montgomery**  
Technology Projects Manager  
Arent Fox LLP

**Program Profile**

- **Firm:** Zuckerman Spaeder LLP
- **Firm Size:** 150 attorneys
- **Coaching Staff:** 3 "part time"
- **Program Participants:** 21 participants at any given time
- **Program Launch:** 2004

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## Prescription for Success

**R**  
Part: 17 Trainers  
Date: 24 August 2011  
Instructions:  
Follow suggested tips for a successful  
Attorney Coaching program in your firm.  
Ref: *ibattitud*

- Culture
- Goals
- Staffing & Resources
- Communications
- Participants
- Timeline
- Evaluation

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## Culture

“Me in a classroom? That isn’t going to happen. Rightly or wrongly, I believe that what you are teaching in a classroom doesn’t apply to me. What you teach me in my office *must* apply to me...if it doesn’t, then I’ll just throw you out.”

*- Partner*

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## Culture

“Technology coaching has made me far more efficient in editing documents and in working with clients on a variety of projects. More generally, it has helped me understand the uses of the computer in the practice of law.”

*- Partner*

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## Goals

“I found the coaching program to be very useful on several levels...reminding me of things I should still know but have forgotten(!), and teaching me new ways to be more efficient with my time and resources, so that my service to clients has been improved.”

*- Partner*

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## Staffing & Resources

“This was the most effective – and rewarding – program I created in my 15-year career. And it was one of the most logistically challenging and resource-intensive, too. As someone once said while trying to corral a shark of a different kind: You’re gonna need a bigger boat.”

*- Training Manager*

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## Communications

“I have to say, I love your ‘marketing’ materials!!! That is the cutest thing I have ever seen in terms of interesting me in a computer class and it facilitates daydreaming about lounging in a fabulous resort. You go girl!!!”

*- Partner*

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**Communications** 

“I think you know very well the reasons I elected to participate. First of all, you told us that only some of us would be able to participate, and I do not like being told I cannot do something...even something I am not entirely sure I want to do. And, just as important: iTunes gift card.”

- Partner

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**Communications** 

“This was a terrific program. I've been recommending it to other partners.”

- Partner

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**Participants** 

“That will save me so much time!”

- Secretary

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**Timeline** 

“I was confident I could make better use of the technology available at the firm. The Tech Coach program has proved very helpful in teaching practical ways to use technology with a minimal investment of time.”

- *Managing Partner*

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**Evaluation** 

“I highly recommend the Tech Coach Program – not just to novice users, but the proficient as well. I greatly benefited from the tips my Coach taught me and I frequently incorporate the lessons into my revamped daily routines. It has greatly streamlined my productivity.”

- *Associate*

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**Lessons Learned** 

**1** Mind the gap

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Lessons Learned 

**2** Buzz will only get you so far

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Lessons Learned 

**3** Be impeccable with your word

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Lessons Learned 

**4** Success isn't accidental

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