



Contact [profdev@alanet.org](mailto:profdev@alanet.org)  
for more information.

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# Communications Management

## Body Language

Do you know the science of nonverbal communication? We will delve into how to use body language to communicate, influence and connect with others in a professional environment. Body language science can also help attendees understand how to decode emotions, uncover truth and increase the accuracy of workplace communications. Participants will be able to use these tips both inside and outside the office. This science-based talk will be lively and entertaining and have actionable tips.

### 1) Behavior Styles: Creating Trust and Respect in the Workplace

This interactive workshop will explore the four spectrums of human behavior and uncover how administrators, supervisors and managers can use Behavior Styles theory to increase trust, respect and morale in the workplace and to improve their own effectiveness as managers.

#### **Topics and skill building:**

- Discovering and gaining appreciation for your own behavior style
- Understanding your impact on others as a manager, coworker and employee
- Personal flexibility in the workplace (how to “adjust” to better meet the needs of others)
- Identifying the various styles among employees
- Using Behavior Styles to help employees resolve conflict
- Recognizing signs of stress and burnout by using people’s Behavior Style cues
- Behavior Style-based management tools relating to meetings, decision-making and communication
- Teaching tolerance and appreciation for those “porcupine people” we all know and try to love

This fun, interactive workshop explores the four spectrums of human behavior and reveals how attorneys, administrators, managers and employees can use the Behavior Styles Theory to increase trust, respect and morale in their law firm, as well as improve their own effectiveness. In this workshop, participants will examine the ways people process information (“think to talk” versus “talk to think”), display emotion, make connections, deal with change, handle conflict, and much more. The class will start informational, and then quickly move into identification one’s own style combination and how to identify the style of others, for the purposes of learning to “get” one another (understanding plus empathy) and knowing where and how to make slight adjustments in one’s own style to better meet the needs of those around you.

#### **Participants will learn how to increase trust and respect in their firms by:**

- Discovering and gaining appreciation for their own behavior style combination
- Developing a better understanding of their general impact on others

- Seeing the importance of, and specifically how, to adjust styles slightly to better meet the needs of others
- Learning to identify different behavior styles among employees, attorneys and clients
- Recognizing signs of stress and burnout by noticing an individual's behavior style cues
- Learning to use Behavior Styles theory to enhance meetings, decision-making and communication
- Focusing on three specific growth opportunities for their own unique behavior style combination

## Stress Reduction

### 1) Yoga to Stress Less

Super moves to energize you or relax you depending on your current physical, mental, emotional and spiritual needs. The speaker will share easy and fast ways you can stress less and kick your productivity into high gear from your desk, in the car and on-the-go that will tap into your power centers to re-balance you. She makes yoga and other wellness practices approachable, non-intimidating and fun to integrate into your day-to-day life at work and at home. Great for men and women of all ages and demographics. This fun and motivating session can be added in to another program or given as a standalone session.

#### **Learning Objectives:**

- Understand why yoga doesn't have to be hard or just for hippies.
- Learn quick Power Yoga moves that can be done anywhere.
- Create a Powershot plan of tiny things you can do to shift your energy instantly.

### 2) Stress and the Brain

Do you have "crazy" people in your organization? If you employ HUMANS, then you probably do. What percentage of your employees are on psychotropic medications? Do you have employees who are depressed? Do you have employees who get angry or are offended over nothing?

Getting your employees to adopt healthy brain habits is critical to having a productive workforce. In this session, you will learn what we all need to do to repair and care for our brains.

#### **Brain Repair and Care**

- How do our soldiers and American workers get PTSD?
- Why do American lawyers have the highest suicide rate in the country?
- Why do over 75% of all of Ohio's public sector employees retire with serious mental disorders?
- How will chronic distress cause serious damage to your brain, resulting in such conditions as short-term memory loss, depression, anxiety, PTSD and so on?
- How do nuclear SPECT scans work and what role do they can play in diagnosing and treating mental impairments?

- How does the human brain and social epigenetics work — which is the neuroscience of how the brain will physically change based upon the environment you subject it to on a daily basis?
- How can you enable your brain to actually repair itself, which is the neuroscience of “Neurogenesis” and “Neuroplasticity”?
- Why are Omega 3s referred to as “Essential Elements” and what do they actually do in the human brain?
- How is McDonald’s killing us and driving us crazy?
- The role supplements, or vitamins and minerals, play in maintaining brain health; and, how will you know which supplements to take and which ones to avoid?
- How does sleep and water repair our brain?
- How does “BDNF” help to grow new neurons and repair your brain; and, how you can get more of it?
- Why are your pets and hobbies a great investment in your own mental health?
- What you need to do to protect yourself personally?

## Communication — General

### 1) Mastering Communications

9–9:10 a.m. Introductions, Agenda Review, Meeting Expectations

9:10–10 a.m. Session 1: Mastering Communication

Whether you are leading or managing others or just looking for more effective ways to get your point across, becoming a student of communication is the key. This session will give you the tips you need to deal with difficult people, influence others, resolve conflicts and confidently convey your message at the right time.

#### **Learning Objectives:**

- Identify your communication style.
- Determine the best ways to communicate based on other styles.
- Examine best practices for conflict resolution.

10–10:30 a.m. Communication Activity

10:30–10:45 a.m. Break

10:45–11:30 a.m. Session 2: Communication Breakdown — It’s Always the Same (But It’s Avoidable!)

A very high percentage of practice management and client-relations problems are caused by bad communication, from decreased productivity and mistakes to dissatisfied clients and malpractice actions. The growing number of communication channels only compounds the problem. Examine technologies and techniques that will help you improve internal and external communication, reduce your stress, improve your service, generate happier clients and lower malpractice risk.

#### **Learning Objectives:**

- Explore the impact of poor communication on productivity, trust and corporate culture, as well as reliability and professionalism.
- Discover ways to eliminate breakdowns in communication.
- Develop techniques to improve internal and external communication.

11:30 a.m.–Noon            Communication Activity 2

Noon–12:30 p.m.        Action Plan — Next Steps

## 2) Communications

This fun, informative and interactive session will give you a blueprint to create a high-performing team. Participants will leave the session with a new vocabulary and appreciation of how to leverage different personalities at work.

### Learning Objectives:

- Connect with different personalities.
- Leverage those differences.
- Reduce workplace drama.

## 3) Science of Communication

The science is clear: With higher interpersonal intelligence, we increase our income, we take fewer sick days, we feel more bonded with our team, and we are more loyal to our companies. But how can we improve interpersonal intelligence? In this talk, you will go through a series of activities to increase PQ immediately. This includes communication strategies, relationship builders and speed-reading clients and colleagues.

## 4) Communications

### DETAILED OUTLINE

9–9:20 a.m.

**Theme:** Introduction and opening story to frame the conversation for the session.

**Exercise:** Divide the group into groups of three or four to discuss their biggest frustrations and challenges with interpersonal communication in their work environment.

9:20–9:45 a.m.

**Theme:** The purpose of communication, the risks when communicating and the importance of trust

**Exercise:** In the same groups, discuss the aspects of trust and identify five specific ways to communicate and act to build (or rebuild) trust with someone.

9:45–10 a.m.

**Theme:** Introduction to *The 7 Deadliest Workplace Communication Sins*

10–10:15 a.m.

**Theme:** Communication Sin No. 1

**Exercise:** Conduct an exercise with same groups to explore how Communication Sin No. 1 manifests in their work environment and affects positivity, productivity, professionalism and profits at their firm.

10:15–10:30 a.m.

**Theme:** Communication Sin No. 2

**Exercise:** Continue an exercise with same groups to explore how Communication Sin No. 2 manifests in their work environment and affects positivity, productivity, professionalism and profits at their firm.

10:30–10:45 a.m.

**Break**

10:45–11 a.m.

**Theme:** Communication Sin No. 3

**Exercise:** In new groups, partners explore how Communication Sin No. 3 manifests in their work environment and affects positivity, productivity, professionalism and profits at their firm.

11–11:15 a.m.

**Theme:** Communication Sin No. 4

**Exercise:** In new groups, partners explore how Communication Sin No. 4 manifests in their work environment and affects positivity, productivity, professionalism and profits at their firm.

11:15–11:30 a.m.

**Theme:** Communication Sin No. 5

**Exercise:** In new groups, partners explore how Communication Sin No. 4 manifests in their work environment and affects positivity, productivity, professionalism and profits at their firm.

11:30–11:45 a.m.

**Theme:** Communication Sin No. 6

**Exercise:** In new groups, partners explore how Communication Sin No. 6 manifests in their work environment and affects positivity, productivity, professionalism and profits at their firm.

11:45 a.m.–Noon

**Theme:** Communication Sin No. 7

**Exercise:** In new groups, partners explore how Communication Sin No. 7 manifests in their work environment and affects positivity, productivity, professionalism and profits at their firm.

Noon–12:15 p.m.

**Theme:** Introduction to *The 4 Workplace Conversations Model* and how the seven communication sins cause three of the conversations to be the “wrong” conversation.

12:15–12:30 p.m.

Final questions, reflection on learnings, takeaways and commitment to the 1% solution for improving interpersonal communication.

## 5) Communications

Make Difficult People Disappear™ takes dealing with difficult people to a whole new level! This course will teach employees and leaders how to reduce their own stress levels and eliminate conflict with others in the workplace — and at home! Make Difficult People Disappear™ provides you with 10 easily applicable steps for seeing others as different instead of difficult. Once that happens, greater acceptance, tolerance, productivity and camaraderie will be the words used to describe your employees and teams.

### **Learning Objectives:**

- How and when to motivate team members.
- How to recognize those you lead with or without “pom-poms.”
- How to shift the mindset from one of constant difficulty and negativity to one of acceptance.
- How to assess your own needs and the needs of those you lead or work with.
- How to remove the labels that create conflict.
- How to align your expectations with the capabilities of those you lead on the team.

## **6) Communications**

Speaking up when we are frustrated is hard and, as a result, most of us don't. Instead, either we tell other people (aka gossip) or we say nothing, and relationships become strained. You can say anything to anyone and have it be easy. You just need to lay the ground work to do so, and most of us don't.

Before:

- You have a request for someone in IT, but you don't know how to say it, so you don't say anything.
- A project you worked on for six months has become a black hole. There is no information about the status. You're frustrated, but you don't say anything.
- One of your customers has unreasonable expectations. How do you say no, without saying no?
- One of your colleagues isn't pulling her weight. It's impacting you, but you don't say anything.

After:

- Establish trust in any relationship, laying the foundation to be able to address issues when they arise.
- Set expectations with coworkers, direct supervisors and clients – paving the way to successful long-term relationships.
- Determine what's important to your manager, coworkers and clients making it more likely that you give them what they need.
- Tell others what you need, making it more likely that your needs are met.
- Create a regular practice of requesting feedback, so that you know your reputation and how you are perceived among your clients and coworkers.
- Receive more feedback and implement it.

## **7) Communications**



Giving feedback is challenging for everyone. No one wants to hear that she isn't doing a good job. And thus, no one wants to tell her. Telling your boss you're frustrated or aren't hitting your targets can be even more difficult, and thus many of us say nothing. Worse is that most feedback, positive or negative, is useless because it's vague.

Get a simple formula to make even the most difficult conversations easier. Conversations will be short, specific and to the point. They won't be personal. They will be actionable. You'll be able to say what you want to say, when you want to say it, in a way that people can hear you and take action.

#### **Learning Objectives:**

- Package and deliver difficult messages, managing the impressions you create.
- Give clear and specific feedback that employees can act upon immediately.
- Provide feedback to peers, direct supervisors and others at a higher level in a way that does not elicit defensive responses.
- Demonstrate commitment to developing employees' careers and retaining key talent.
- Eliminate your blind spots. Manage your career, reputation and results.
- Receive more feedback without showing emotion or frustration.

## **8) Communications**

Take a fun and entertaining look at why men and women communicate the way they do, and why our differences can be traced back to how we are all "wired." We will show you how we can all communicate better with each another.

- Why do men and women think so differently from each other?
- How is a woman's brain wired compared to a man's?
- Why do women tend to be more detail oriented than men?
- Who tends to talk more: men or women?
- How can you distinguish between "stereotypes" and the "real differences" that exist between us?
- Is PMS real?
- What role does testosterone and estrogen play in how we communicate with each other?
- Is there really such a thing as "women's intuition"?
- What steps do we all need to take in order to better communicate with each other?

## **9) Communication Styles and Methods**

As a role model and leader of your law firm's "jungle," your ability to communicate with persons inside (and out) the "tribal organization" is critical to thriving, and not merely surviving, as a legal administrator. In this solution-filled, fast-paced session, you will skip the "should-do's" and get the exact "how-tos" for highly effective communications with coworkers, clients and vendors. Learn how to identify the correct communication style and medium for your audience, and how to overcome the obstacles that block effective communication skills.

**Learning Objectives:**

- Identify your individual “wild” communication style.
- Determine how to talk to the “other animals in your jungle.”
- Examine the value of communication processes in the modern law firm.
- Discuss the top seven barriers to clear, concise communication.

## 10) How to Be a Phenomenally Effective Trainer and Communicator

Savvy legal administrators must be highly proficient in wielding various instruments of communication. Your arsenal must contain skills and strategies for communicating with partners, shareholders, cohorts, staff, vendors and clients. So whether you are facilitating training, leading a meeting or making announcements to your staff, you are in an enormously powerful position. Join this session to become a high-impact communicator and leave armed with the top 10 secrets of award-winning professional speakers that will ensure your message is compelling, relevant and memorable.

**Learning Objectives:**

- Examine strategies for communicating with poise and purpose.
- Create high impact communications with a step-by-step guide.
- Determine how best to communicate with visual, auditory and kinesthetic learners.
- Identify how to use PowerPoint® and other visual learning tools.
- Watch as 1–3 attendees are coached in real time as they deliver a 3-minute presentation.

## 11) Using Communication to Engage, Energize and Motivate Your Firm’s Staff

Law firm leaders need to get talking! Today’s top talent in the legal field needs to understand how their work and contributions affects the satisfaction of the staff and overall success of the firm. Join this session to hear how consistent, thorough and truthful communications provides the connection between your law firm and all staff members that keeps them motivated and engaged. Bring back no-cost approaches for improving morale and productivity you can use immediately in your firm.

**Learning Objectives:**

- Explain how your organizational culture impacts productivity, profitability and staff retention.
- Lead by example through communication.
- Examine how the generation gap creates the communication gap.

## 12) Employee Motivation

There is a critical link between emotional intelligence and success as a leader or a manager. Learn how to improve employee motivation by using proven leadership practices in a unique, practical, entertaining and humorous style.

- what does it really mean to be a “strategic” leader?
- What is the real difference between the strategic leaders in Jim Collins’ book, “Good to Great” and less successful leaders?
- What is “emotional intelligence” and why is it so critical to becoming a strategic leader?

- How do strategic leaders foster high motivation, high morale and high production in their employees, and how can you measure that?
- How can you measure and then improve a leader's level of "emotional intelligence " (EI)?
- What EI factors do most leaders commonly lack?
- What roles do employees and management really play?
- How did Heinz Frozen Foods boost its production from 83% to 92% efficiency in just 10 months?
- What is the number one employee "motivator"?
- What are "balanced rewards"?
- What are the 5 common traits that all "great leaders" possess?
- What are the 7 tell-tale signs that you are dealing with an emotional child?
- which leadership style promotes high motivation, and which style is destructive?
- How can you measure and then improve a leader's level of "emotional intelligence"?
- What is the number one employee "de-motivator," and how does this directly affect an organization's return on investment (ROI) on its cost of labor and its profitability?

### 13) Conflict Resolution

Outlines the basic skills of EI and conflict resolution that allows anyone to more effectively resolve conflict rather than escalating it!

- What is verbal jeeet, and how can we all learn to use it?
- How can you resolve conflict rather than escalating it?
- How should you define "respect"?
- What are "EPR" skills and why are they critical in keeping others off the defensive?
- What is the "power of vulnerability"?
- What is the "neurology of emotions" and why do we humans react the way we do?
- What are the three communication styles we use, and which one works?
- How can "retreating" and "attacking" communication styles destroy all your relationships — even though they are the most common styles we use?
- What is "honest respectful communication?"
- What are "parroting" and "rewards," and how do they equal "respect?"
- What is "accusatory language" and how will it escalate any conflict?
- why does conflict build trust?
- How do the passive aggressive destroy trust worse than your attackers?
- What is the "magic bullet" in the verbal jeeet system of resolving conflict?
- Why is emotional intelligence a key skill in resolving conflict?
- What is the No. 1 killer of all relationships?
- Why do over 70% of all third marriages fail?
- What should you require in your culture to resolve conflict?

## Managing Mistakes Like A Comedian

**PROGRAM DESCRIPTION:** Nobody tries to fail, but sometimes things go “not as planned,” and recovery is rough. Comedians know this more than anyone because they have a very high-profile job. And when they flub up, or something goes wrong, it needs to be fixed fast and on the spot. Comedians also learn their jobs by trial and error, emphasis on "a lot of error!" **Learn practical tips on how to handle, avoid and move through these situations . . .** and she does it with her distinctive humor in a way that audiences listen and remember! Don't let mistakes and mishaps hinder future success!

### **AGENDA:**

1. Opening Discussion on failure. . . famous and not-so-famous failures.
2. Is it really failure?
  - a. Steps to determine if it really is a mistake
  - b. Why it may not be a mistake
3. Mistakes not within our control.
  - a. Was it really something you did?
  - b. Tips when you're not the one in charge of the mishaps.
4. Mistakes happen, and we're responsible.
  - a. How to handle it while it's happening
  - b. How to recover after it's happened
  - c. Communication techniques
  - d. How to avoid making it in the future
5. Wrap-up!
  - a. Open discussion about applying it to your personal situation
  - b. Discussing "rules" to live by

### **LEARNING OBJECTIVES** – at the end of this keynote session:

- Participants will gain a thorough understanding of the major causes of failure
- Participants will learn 5 skills they can develop for avoiding pitfalls and assuring success
- Participants will discover techniques to use when things are going awry
- Participants will gain tools to assess the aftermath and then move forward

## Writing

### 1) Effective Email

A single ill-considered email can mark the end of a long client relationship, the beginning of a lawsuit — or the dawn of a new opportunity. Endless email checking drains productivity and ruins focus. Managing email effectively and writing email sensibly are core competencies because, in today's economy, email *is* business writing. In this session, we present 10 principles of effective email.

9–9:10 a.m.

**Introduction:** Email is business writing. Costs of poor emails and benefits of clear, appropriate emails

9:10–9:20 a.m.

**1. Make sure email is the right medium for your message.**

*Objective:* Realize that email is not the right medium for every message and be able to discern when different modalities are appropriate.

*Activity:* Write down situations when email, telephone or face-to-face communication would be best.

9:20–9:30 a.m.

**2. Remember that emails are public documents.**

*Objective:* Identify potential costs of emails that become public.

*Activity:* List types of messages that should not appear in an email.

9:30–9:55 a.m.

**3. Use the three Ps.**

*Objective:* Understand the importance of planning an email and learn to identify the purpose, analyze the reader and hone the point of the message.

*Activity:* Identify situations when various document purposes might be appropriate.

*Activity:* Identify the hot buttons and inner questions of groups to which you commonly write.

*Activity:* Identify the point in a sample email.

*Activity:* Plan an upcoming email.

9:55–10:05 a.m.

**BREAK**

10:05–10:20 a.m.

**4. Be a credible sender.**

*Objective:* Understand that sending too many emails, cc'ing people unnecessarily and other habits detract from one's credibility.

*Activity:* List actions that currently undermine your credibility.

*Activity:* List ways to increase your credibility as a sender.

10:20–10:40 a.m.

**5. Be smart about subject lines.**

*Objective:* Learn the importance of the subject line along with five tips for writing a successful subject line.

*Activity:* Write a subject line for a sample email.

10:40–10:55 a.m.

**6. Include enough information.**

*Objective:* Recognize that sending too little information can make messages unclear and harm the organization's memory of a person's work.

*Activity:* Revise a sample email to make it more comprehensive.

10:55–11:05 a.m.

**BREAK**

11:05–11:20 a.m.

**7. Proofread carefully before you hit send.**

*Objective:* Recognize that failure to proofread can destroy the impact of the message and undermine the credibility of the sender.

*Activity:* Proofread and correct sample sentences.

11:20–11:40 a.m.

**8. Maintain appropriate tone.**

*Objective:* Recognize that tone is an important factor in whether the reader accepts one’s message.

*Activity:* Warm up or cool down the tone of sample emails as appropriate.

11:40–11:55 a.m.

**9. Include a call to action for maximum response.**

*Objective:* Understand that people respond to calls to action. Avoid open-ended closings to your emails.

*Activity:* Insert calls to action in sample emails.

11:55 a.m.–12:10 p.m.

**10. Have an email strategy.**

*Objective:* Increase focus and productivity by creating a strategy to deal with email. Commit to checking email less frequently.

*Activity:* List how often you need to check email every day and at what times you will do so.

*Activity:* List three strategies to help you manage the email in your job.

12:10–12:30 p.m.

**Closing Exercises**

*Activity:* Identify key takeaways. Review what we have covered and circle the principles you think will be most valuable to you. Think of one small change you can make in the way you use email. Commit to this one change for 30 days. The instructor will contact you in 15 days and in 30 days to support you in your commitment.

## 2) Writing for Impact

You don’t have to be a “natural” writer to write well. You simply need to know the secrets that clear writers use to make their writing flow. In this fast-paced, interactive program, you will practice the skills for writing strong, clear, to-the-point reports, proposals and emails.

By improving your writing skills, you do more than make yourself a better employee — you develop communication and leadership skills that help you stand out and advance in your career and life.

**PREREQUISITE:** Every participant should bring a one-page writing sample to the session.

9–9:15 a.m.

**Introduction:** How does writing touch your life? What are the costs of poor writing? What are the benefits of good writing?

9:15–9:35 a.m.

### **Use the Three Ps**

*Objective:* Understand the importance of planning a document and learn to identify the purpose, analyze the reader and focus on the point of the message.

*Activity:* Identify situations when various document purposes might be appropriate.

*Activity:* Identify the hot buttons and inner questions of groups to which you commonly write.

*Activity:* Identify the point in a sample document.

*Activity:* Plan an upcoming document.

9:35–9:50 a.m.

### **Make Your Sentences Pack Power**

*Objective:* Understand basic sentence structure.

*Activity:* Identify sentences and non-sentences.

*Activity:* Identify the independent and dependent clauses in sample sentences.

9:50–10 a.m.

### **BREAK**

10–11:05 a.m.

### **Four Ways Professional Writers Keep Their Writing Interesting**

*Objective:* Master four techniques for writing clear, succinct sentences.

*Activity:* Change bulky nouns to vivid verbs in sample sentences.

*Activity:* Eliminate unnecessary words in sample sentences.

*Activity:* Change the passive voice to the active voice in sample sentences.

*Activity:* Revise complex sample sentences to make them clear.

## Change Management

### 1) Change Management

Between budget cuts, layoffs and changing rules and regulations, there's a lot coming at you. And all this change causes fear, tension and miscommunication. In this popular keynote, your group will learn how to diffuse tension instantly, kick off tough conversations and facilitate communication through humor. These practical tips, infused with plenty of humor, will have attendees walking away laughing and learning how to handle and even embrace change. And they'll also learn about the connection between humor and health through the latest research. This keynote is a hit with hundreds of local, state and national organizations.

#### **Learning Objectives:**

- Participants will have practical, immediately usable skills for handling change using humor, including how to diffuse tension instantly, kick off tough conversations and open lines of communication.
- Participants will be able to understand what they should avoid doing when faced with change.
- Participants will understand the importance of adapting to change.

- Participants will understand the health benefits of using humor.

#### **OUTLINE:**

9:30–10:30 a.m.

#### **Opening: Customized Humor and a Look at Change**

The opening segment includes humor on work, family and day-to-day life as well as customized humor based on client interviews. It also encompasses a quick look at things that are changing.

#### **Why Do We Hate Change?**

Discussion of the barriers we deal with when trying to get our heads around change. Why do we need to embrace it? What stops us from welcoming change — especially tough change?

*Activity:* Group discussion: What changes are you currently dealing with?

10:30–11 a.m.

#### **Humor and Change**

- Presentation of the research on the health benefits of humor
- Tips for using humor appropriately

11–11:15 a.m.

#### **BREAK**

11:15 a.m.–12:30 p.m.

#### **Handling Change**

- Quick techniques to diffuse tension instantly through humor
- Ideas for kicking off tough conversations by using humor
- Procedures for changing your focus when faced with tough change

*Activity:* Small-group breakout: Practice solutions to given situations.

#### **Wrap-Up**

Quick overview of handling change and the previous points interspersed with additional humor and examples.

## 2) Change Management

Policy change! Downsizing! Mergers! Conflict! Improving morale! Law firms and legal services are clamoring for ways to manage change. This interactive presentation reveals valuable insights and ideas to help employees, teams and leaders obtain a higher level of success while managing the economic and business situations in the real world. The focus is on emotional intelligence, personal responsibility, dumping the entitlement mentality and improving self-awareness. Instead of simply preaching what is needed and expected, these tools help people navigate through the minefield of complex "gray areas" encountered in today's dynamic workplace. Customer service will be improved, client retention maximized and turnover reduced when this new approach to change is applied.



## Learning Objectives:

- Establish clarity and instantly communicate needed information to manifest the changes necessary for your group. This includes how to manage those resistant to your message and how to mobilize commitment and establish a sense of urgency.
- Identify where individuals are in the levels of change and how to leverage the type of change agent they have become. These ideas improve morale and reduce turnover, keeping and attracting the best talent. In addition, your change manifesto will be reached.
- Speed-read people through their communications and behavioral style. Use the Style Awareness information, communication and listening, shortening the time needed to implement the necessary change is improved.
- Continue to use case studies in real-time situations to lead people successfully through the dynamics of change, helping the group apply the usefulness of the information through an actual business application.
- Emotional intelligence studies tell us that 10 percent of success is from cognitive knowledge and 90 percent is from building relationships and this is why it is important for everyone to know ‘how to.’
  - Staying flexible to people’s behavioral and communication style is a critical factor in managing change.
  - Remove dissention and conflict by learning to respond and not to react, creating the pathway to improved employee relations and excellence in client care.
  - Take a deep dive into understanding the levels of change — “Victim,” “Neutral,” “Critic” and “I’m in” — and how to adapt to each of these.
  - Deal with difficult situations and toxic people who resist change, helping them understand the consequences for the behavior.
  - Learn why the TLC approach (Take it. Leave it. Change it.) is critical when building a path through a changing environment.
  - Keep an open mind and help others do the same.
  - Provide feedback by using the Liked Best – Next Time technique.

9–9:15 a.m.

**Objective:** Review the components of emotional intelligence and the importance of using this tool when dealing with change.

**Activity:** Break into pairs and provide a case study so they can practice applying emotional intelligence to a real situation.

9:15–10 a.m.

**Objective:** Review the four types of behavior and communication styles.

**Activity:** Explain the Style Awareness Assessment and have each participant complete it. Plot the results on a chart so participants can see the disposition of the group. Ask participants to identify a colleague or employee who is not readily adapting to change. Give pairs time to discuss how they will apply the Style Awareness information and how they will adapt their style to the issue.

10–10:15 a.m.

**Objective:** Remove dissension and conflict by learning to respond and not to react, creating the pathway to improved employee relations and excellence in client care.

**Activity:** Participants share with their accountability partner how they will change the approach (both mentally and verbally) to a current issue in their group or with a particular person.

10:15–10:30 a.m.

**Objective:** Take a deep dive into understanding the three levels of change — “Victim,” “Neutral,” “Critic” and “I’m in” — and how to adapt to each.

**Activity:** Ask the group to identify a person on their team who is having difficulty adapting to change and which of the three levels they are in.

10:30–10:45 a.m.

BREAK

10:45–11:25 a.m.

**Objective:** Review the four types of behavioral styles that people fall into when moving through the levels of change. Explain how to deal with difficult situations and toxic people who resist change, helping them understand the consequences for the behavior.

**Activity:** Ask the group to identify a person on their team and where they think their person fits in the four levels of change. Identify why they display those characteristics and what can be done to help them move through the stages of change.

11:25–11:35 a.m.

**Objective:** Learn why the TLC approach (Take it. Leave it. Change it.) is critical when building a path through a changing environment.

**Activity:** Pairs ask each other to identify a person who the TLC tool would be effective with. In addition, discuss the particular approach to be used in that scenario.

11:35–11:55 a.m.

**Objective:** Review how to keep an open mind to change and help others do the same. This will include review of the Assertive Communication Model how to say no without feeling guilty.

**Activity:** In pairs, individuals will be asked to identify someone who tends to have a closed mind. Using the Assertiveness model, they will write out what they would say to the person, and then practice with their partner.

11:55 a.m.–12:05 p.m.

**Objective:** Review ways to provide feedback by using the Liked Best – Next Time technique, leading to the outcomes needed and helping them understand the change that needs to be made. This will also

assist in more effective delegation.

**Activity:** Ask for volunteers from the group who have used this approach to validate this tool to the rest of the attendees. Discuss why it works vs. you could have, should have, might have, etc.

12:05–12:15 p.m.

**Objective:** Lead change by developing listening skills and by asking specific questions.

**Activity:** In pairs, individuals will identify someone who is not a good listener, how they determined this and what they can do. Use any of the tools previously reviewed.

## 4) Humor, Resilience and Change

Change at work is inevitable. Laughing at it is not, but it's a great way to manage through difficult times. This talk teaches how to face the inevitable and turn your workplace back into one that's productive and fun.

This talk is ideal for those who work in stressful environments. Motivational, funny and high-energy, this session provides strategies for you and your team to stay balanced in a sometimes-unbalanced world, adapt to change, and stay focused on your business goals.

In this highly engaging and interactive session, you'll explore strategies to deal with change, how to stay resilient and healthy in times of change and stress, and how to effectively use humor in your office to manage through change.

Learn how to get the most out of work, deal better with change, and laugh at just about anything.

### **Learning Objectives:**

- Understand stress and its emotional and physical impact.
- Re-enforce the need to take care of yourself to help the team.
- Understand each individual's change style.
- Use humor effectively to combat stress and the challenges of change.
- Learn tactics to reduce stress at work and at home.

## Empowerment

### 1) Empowerment

#### **Learning Objectives:**

- Reverse the accidental adversarial relationship between staff and attorneys/managers.
- Overcome the "drama triangle."
- Empower your staff and managers when faced with conflict.

- Create an empowered and indispensable team.

**Talk Outline:**

- Common obstacles and pitfalls when creating an empowering environment.
- Five ways to generate an indispensable team.
- Three quick ways to create an empowered environment.

**Training Format:**

- 3.5-hour session
- Each session would include 2.5 hours of training and 1 hour for a workshop, as well as time for questions.

## Leadership

### 1) Leadership

9–9:10 a.m. Introductions, Agenda Review, Meeting Expectations

9:10–10 a.m. Session 1: Law Firm Leadership — What Good Leaders Do and Don’t Do

Think that the only leaders in your firms are the partners? Think again! Successful firms have leadership coming from key employees throughout the organization — including YOU! This session will give specific examples of how to handle the types of issues you face every day and turn them into a positive through leadership tips and techniques.

**Learning Objectives:**

- Identify areas where their leadership skills can improve.
- Develop some leadership strategies to take back and use at their firm.
- Determine ways they can help other leaders in the firm become more successful.

10–10:30 a.m. Leadership Activity 1

10:30–10:45 a.m. BREAK

10:45–11:30 a.m. Session 2: The Importance of Leadership and Management

You have probably heard this quote from Peter Drucker: “Management is doing things right; leadership is doing the right things.” While that is certainly a great quote, there is more to it than that. To improve the leadership and management at our firms, we must understand the difference between the two and the importance in investing our time and energy to have better leaders and managers. This session will explore the differences and give you practical tips to become a better leader and manager.

11:30 a.m.–Noon Leadership Activity 2

Noon–12:30 p.m. Action Plan – Next Steps

## 2) Leadership

9–9:20 a.m.

**Objective:** Develop common language and processes for the time together.

**Exercise:** The group contributes to a charted list of operating rules.

9:20–10 a.m.

**Objective:** Develop common language about the culture of the firm.

**Exercise:** The group contributes word choices that describe the culture of the firm, also charted for reference throughout the morning.

10–10:30 a.m.

**Objective:** Explore our communication through interaction.

**Exercise:** Use a simple activity to emphasize communication skills to solve.

10:30–10:45 a.m.

BREAK

10:45–11:15 a.m.

**Objective:** Working together, we achieve more.

**Exercise:** Name a specific current challenge. Form small groups to approach it — all the way to resolution (future).

11:15–11:45 a.m.

**Objective:** Debrief the activity to explore learning and ideas.

**Exercise:** Small groups report out to the room. Capture information on the flip chart.

11:45 a.m.–12:15 p.m.

**Objective:** Create action items from the various learning activities of the morning.

**Exercise:** The whole group participates in setting action items that are SMART.

12:15–12:30 p.m.

Wrap-up, questions, one-word exercise

## 3) Leadership

9–9:20 a.m.

**Theme:** Our experiences create the pattern in which we see and interact with the world.

**Exercise:** The group is broken into teams where they need to use creative and unique questions to complete a task.

9:20–9:35 a.m.

**Theme:** When we move from “have to” to “get to,” we produce our best work.

**Exercise:** The group provides feedback to try and guess the motivations of individuals who have completed a particular task.

9:35–9:55 a.m.

**Theme:** By questioning the boundaries, we can create more solutions.

**Exercise:** In a traditional logic puzzle with a slight twist, participants try and solve a problem that is seemingly impossible but has several solutions.

9:55–10:10 a.m.

**Theme:** Working together, we achieve more.

**Exercise:** Participants have a thumb wrestle with a little twist and different kind of auction.

10:10–10:20 a.m.

**Theme:** The No. 1 thing that holds us back is our own perception.

10:20–10:40 a.m.

BREAK

10:40–11:40 a.m.

**Theme:** The 10-80-10 Principle — focus on your strength

11:40 a.m.–12:10 p.m.

**Theme:** Specific examples of and exercises around the 10-80-10 Principle

12:10–12:20 p.m.

Questions

12:20–12:30 p.m.

Wrap-up

#### 4) Leadership

Effective leadership is all about communication. Understanding how to handle the most important management conversations is the key to improving team performance, retaining talent and increasing team accountability. Participants will leave this interactive session with important new communication tools.

##### **Learning Objectives:**

- A descriptive review of the five conversations leaders must get right.
- Learning when to have a certain conversation.
- Leadership scripting to make sure your conversations as successful.

#### 5) Leadership

What if the rules for the game we played as kids crept into your office? In some ways it has, as leaders often appear to be chosen at random or picked because they got tagged, rather than because they had the right skills. But what are the ideal criteria? What skill set does your next leader need to succeed and be a good fit for the team? Duck, Duck Leader™ helps you answer that, as well as uncover pitfalls, solutions, needed adjustments and remedies for when that critical first step is skipped. This session will

keep your leaders from running around chasing their position, while avoiding the negative results that stem from a leader who was promoted when they weren't ready and believes they've been goosed with the opportunity!

**Learning Objectives:**

- Learn three common pitfalls that occur when leaders are poorly picked and promoted.
- Get simple methods for leadership criteria selection that aligns the person and the position.
- Discover how to use four psychographic categories that reveal more than promotion interview questions.
- Develop six solutions for improving poorly prepared leaders.

## 6) Leadership

Any person or personality can be a leader, but for you ... is it a fit? The same style of leadership, however, is not a fit for every candidate, and many would even say the glamour of being a leader is not all it's cracked up to be. Leadership Is Not a Glass Slipper™ is the session in which you'll easily see which style works for those you lead and the skills needed to lead even more effectively. Complete with 10 steps for individualized leadership development, this session helps you find your strengths and guides you to determine which people are the best fit for your team, practice and even among the attorneys who influence your office environment.

Engaging and entertaining, understand the difference between promoted vs. prepared, be challenged to lead well, and receive guidance on how to look at leading differently. Whether your leadership skills could improve in communication, delegation, motivation, recognition or engagement, this powerful session clarifies which type of leadership "shoe" fits and whether you're the right person for it!

**Learning Objectives:**

- Identify key leadership actions that elevate effectiveness in communication and engagement.
- Apply identification tactics to vacancies, gaps and missing skills in your office.
- Determine, based on one's preference, whether being a leader is a role that truly and comfortably fits!

## 7) Leadership

Are leaders born or made? In this session, we will explore the latest fascinating neuroscience and psychology research of leadership. Attendees will turn the science into practical tips. Whether speaking to managers, employees or doctors, everyone needs to know how to harness the power of leadership. Attendees will leave both energized and inspired to try new leadership strategies in their personal and work lives.

## 8) Leadership: Impact and Influence

Designed for leaders at all levels, this interactive program uses the Power Grid from the speaker's upcoming book to help you tap into the things that charge you up and minimize what drains your energy in the four areas of your life: Programming, Presence, People and Places. When you power up each area so they work together you will make better decisions, manage your time more effectively, have more impact, and feel more confident in sharing your ideas with the world. As you charge up your Power Grid you will build a leadership reputation that attracts more people and opportunities to you and drives impact on personal and bottom-line results. Don't miss this opportunity to create a Powershot Plan that you can implement in the next two weeks after the event and beyond to keep your Power Grid charged up and your goals moving forward!

**Learning Objectives:**

- Understand why you need to charge up your Power Grid to drive leadership.
- Review the four Power Principles and identify where your energy is flowing or draining.
- Create a Powershot Plan to ensure that you maintain momentum and a charged power grid.

## 9) Leadership and Growth

Today's lifestyle is high-energy and high-stress. How can you rise to the challenge of juggling it all without losing your mind? The Happy Hour Effect program reveals five key commitments you need to be successful and fulfilled in your professional and personal lives and gives an eye-opening look at what is really causing us to struggle — LIFE. Yep, as soon as life gets challenging your focus is pulled from what's important in keeping your goals alive. Stress sets in, time and money get tight, you suffer a loss, kids and relationships demand your attention, to-do lists become overwhelming and pretty soon the career path, the business goals or personal dream that was once energizing becomes a drag. Through the 5 commitments you will get back in touch with your spark of brilliance and re-engage with your goals. You will create actionable, fun and easy goals to spin stress into success, so you focus on the right actions for business and personal growth.

**Learning Objectives:**

- Understand why and how stress impacts your personal and professional success.
- Uncover what is driving your stress and energizing you so you set the right goals in the right way.
- Identify five ways to maintain momentum even when work and life get hard.

## 10) Leadership: Own the Room

When you proactively brand yourself for leadership, you will naturally magnetize people to you and your ideas. When you strategically build an awesome professional persona, it will create more ways for you to connect with others in authentic ways. Not only does this greatly increase the likelihood that you will be seen as a respected leader, but your connections will be more likely to do business with you and refer you as well. During this crucial session for leaders at all levels, you will identify the key elements of your personal and professional brand and position them for career success. You will uncover what makes you



credible, likable, trustworthy and competent both professionally and personally. You will then discuss ways to use these elements to boost your leadership potential, sales effectiveness and relationships at work and at home.

**Learning Objectives:**

- Understand the importance of creating a holistic persona to enhance business relationships.
- Identify the key elements of your personal and professional brand that impact your leadership success.
- Discuss how to integrate your brand elements into your sales, marketing and customer messaging to enhance your relationships, income and bottom-line impact.

## 11) Leadership Strategies to Power Growth

Stepping into your own leadership and unleashing greatness in others even when life and work are difficult require a courageous mindset built on four key attributes. These attributes are the foundation of the RISE code that creates a unique blueprint for life and work happiness, productivity and results driven by the inner resilience to take action amidst stress. During this session, you will identify your unique RISE code and how you can use it to perform at your best, be more productive and help drive personal and career growth.

**Learning Objectives:**

- Learn the RISE code elements and why they are important for momentum, influence and growth.
- Identify your own unique RISE code and how it applies to your leadership and goals.
- Discuss ways you can use your RISE code to help yourself and your team be more successful and more productive to drive bottom-line results.

## 12) Leadership

Explore a proven system designed to help people reach their goals faster and more effectively.

Module 1: Fundamentals of Strategic Management-Coaching-Leadership

Module 2: Fundamentals of Tactical Management-Coaching-Leadership

Module 3: Fundamentals of Management-Coaching-Leadership and The Interviewing, Hiring and Termination Process for Great Talent Management

Module 4: Coaching for Impact: Generational Diversity

Module 5: Coaching for Impact: Resolving Conflict and Confrontations for Team Effectiveness and Change Success

Module 6: Coaching for Impact: Developing High Performers and Solution-Oriented Achievers in Your Organization

Module 7: Service Leadership: Enabling Exceptional Customer Care Internally and Externally to Your Organization

Module 8: Service Leadership: Growing Your Business Through Engaged Internal and External Constituents

Module 9: Service Leadership: Increasing Profitability for Long-Term Planning in a Short-Term World and Ensuring Brand Equity

Module 10: Performance Execution: Succession Planning, Succession Management, Succession Development and Mentoring Human Capital as a Talent Management Strategic Advantage

Module 11: Performance Execution: Long-Term Planning in a Short-Term World and Ensuring Right Talent in Right Place Every Time

Module 12: Performance Execution: Success, Stability and Ensuring Cultural Success

## 13) Leadership

### **Servant Leadership: The Ideal Leadership Model for Modern Law Firms**

Created specifically for modern legal management professionals, this dynamic, upbeat (and appropriately humorous) program explores the compelling, positive outcomes law firms garner when they strategically adopt a servant style of leadership and culture.

Using case studies, interactive audience participation, and step-by-step checklists, legal management professionals will be prepared to successfully bring the concepts of servant leadership to their workplace cultures.

#### **Learning Objectives:**

#### **The Servant Leader Mindset: The *Bosshole Style* of Leadership Is Officially Dead!**

- Discover the history and evolution of servant leadership and its powerful entre into the American workplace.
- Learn to translate the original principles of servant leadership into relevant approaches for the legal industry.
- Understand how to transform a Bosshole to a Servant Leader: How to Assist the Transition for Those Who Still 'Command and Demand.'

## 14) Servant Leadership and Ethical Decision-Making

### **Ethics in Business Need Not Be an Altruistic Endeavor: Why Ethical Decision Making Is a Competitive Business Advantage**

## Creating a Serving Culture

- Case studies: see why, and how, other law firms have brought servant cultures to their workplaces
- From the rollout to reaping the rewards: a step-by-step plan for creating a serving culture

## 15) Four Bases of Leadership

Learn how the four bases of leadership result in a more efficient and productive work environment in his own practical, entertaining and humorous style. We will not only outline a process for you to follow in his unique "rubber hits the road" approach but will tell you how to use this information IMMEDIATELY!

- What makes a great leader?
- What are the four essential and sequential bases of leadership?
- What is the "neurology of emotions" and why do we humans react the way we do?
- What is emotional intelligence, and how can you measure it and improve it?
- Why is emotional intelligence a key skill in resolving conflict?
- How does emotional intelligence, resolving conflict, building trust and focusing on goals result in a strong team?
- Why is emotional intelligence, and why is it absolutely vital to "teambuilding"?
- Why do we humans do the crazy things we do?
- What specific steps must managers follow to build relationships and trust with others?
- How should you define and build "trust" in your organization?
- How can you identify "ANTs" ("automatic negative thoughts") and how can you destroy them?
- What are the three communication styles we use, and which one works?
- Why does the speed of your organization go down and costs go up when you violate trust?
- What critical role do supervisors play in building trust and team?
- How does an organization can keep everyone focused on its goals?
- What is verbal jeet, and how can we all learn to use it?
- What are "EPR" skills and why are they critical in keeping others off the defensive?
- Why is "conflict" important in building a "team"?
- Why does conflict build trust?
- What are "bombs" and "rewards," and how do they affect communication and trust?
- Why does "speed" go down and "costs" go up when we lack trust?
- How does an organization keep everyone focused on its goals?
- What roles do employees and management really play?
- How can you resolve conflict rather than escalating it?
- How do the passive aggressives destroy trust worse than your attackers?
- How can "retreating" and "attacking" communication styles destroy all your relationships even though they are the most common styles we use?
- How should define "respect" in your organization?
- How should you use "parroting" and "rewards" to keep others off the defensive?
- How can you identify "accusatory language," and then stop using it?
- How to identify and deal with passive aggressives?

- What is the “magic bullet” in the verbal ject system of resolving conflict?
- What is the No. 1 killer of all relationships?
- Why do over 70% of all third marriages fail?
- What are the seven pillars of a positive culture, and how can you build this culture at your organization?

## Personal Branding

This interactive session will show the importance of continuing personal development in the workplace. It will highlight the value of a personal brand and how it influences performance and relationships. Participants will learn how to leverage and manage their personal brands to increase their influence and effectiveness.

### **Learning Objectives:**

- Discover the difference between reputation and personal brand.
- Leverage and improve your personal brand.
- Increase your influence and connection to the mission of the organization.

## Team Building

### 1) Team Building

9–9:10 a.m. Introductions, Agenda Review, Meeting Expectations

9:10–10 a.m. Session 1: Effective Teams — Getting Things Done

Setting goals for your firm is one thing; achieving them is another. We’ll outline tools you can use to help drive team definition and accountability. We’ll also discuss how you can keep your teams healthy so they are functioning as productively as possible.

### **Learning Objectives:**

- Identify your team’s commonalities and differences.
- Explore root causes of inefficiency and communication styles.
- Determine the best ways to apply tools, communication and perspective to improve team productivity.

10–10:30 a.m. Team-Building Activity

10:30–10:45 a.m. Break

10:45–11:30 a.m. Session 2: Finding Common Ground in a Multigenerational Workplace

Does your firm have a mix of Traditionalists, Baby Boomers, Gen-Xers and Millennials? This session is all about understanding what motivates each group and learning about each group’s perspective and style to help with workplace communication and retention. If leveraged properly, this generational mix can be used to your advantage to make your workplace more productive for all employees.

### **Learning Objectives:**

- Explore the differences and commonalities.
- Discover how communication styles affect productivity and retention.
- Develop specific strategies to leverage each generation's strength to improve the team as a whole.

11:30 a.m.–Noon      Team-Building Activity 2

Noon–12:30 p.m.      Action Plans — Next Steps

## **2) Team Building**

Great training can empower exceptional leaders. Get leader development for managers and business leaders and training to become great coaches. This approach is a training style complete with relevant content, team exercises, and participant interaction. Be prepared to learn, interact, have fun and leave with techniques you can implement right away.

### **AGENDA**

#### **Welcome, Connect and Overview**

**Part 1:** Understanding your communications style and how it relates to others' styles leads to heightened productivity through better relationships, more effective communications and a better environment for everyone.

The ever-increasing pressures of the legal business — employee turnover, expecting smaller teams to do more, more remote workers and the overall competitive nature of what you do — make leading people on your team even more challenging. Organizations are human systems to be cultivated, and developing your organization takes time — which you often feel you don't have. However, sometimes slowing down and getting to know your team members' styles can result in higher productivity and better results.

Each person is unique, not just in their knowledge and skill set but also in how they approach people and problems. Research tells us that managers who are people smart (have high emotional intelligence) are better leaders, retain top performers and get the best from their people.

### **Learning Objectives:**

- Understand and improve your emotional intelligence.
- Become more aware of your own behavior style.
- Learn to read the styles of others — in person and on the phone — and adjust your style to improve communication and increase productivity.

**Lecture/Video/Discussion:** Overview of Emotional Intelligence

**Lecture/Reflection:** Identify your primary style, its strengths and limitations and tendencies under stress

**Activity:** Assessment, share insights

**Lecture:** Observing and appreciating others behavior styles

**Activity:** Practice identifying styles by analyzing case studies. Start identifying styles of team members and clients.

**Lecture:** Adapting to each style to improve communications and workplace productivity.

**Activity:** Gather in groups of similar behavior style. Discuss how to best communicate and coach others' styles. Share insights and receive feedback.

**Discussion:** Real-life scenario application

**Activity:** Share, discuss and get feedback.

## **BREAK**

**Part 2:** Getting to know your team members as people will speed and improve your leadership style and drive stellar results.

If you're a leader in the legal business, you can probably confirm the fact that at least 65 percent of your time is spent dealing with people issues. Industry trends like partner expectations, budget constraints and connecting with remote workers put additional pressure and demands on you and your team. The pace is daunting. However ironic it sounds, sometimes slowing down can help managers bring out the best performance in their people and lead to better results. Possible? Absolutely.

How?

A coaching approach to leadership — which leads to more team cohesiveness, innovation, creativity and problem solving — gives you some of that time back to focus on other things. Employees who clearly understand expectations and know they're accountable enjoy a higher level of job satisfaction, stay longer and produce better results. Isn't that what we're all after?

### **Learning Objectives:**

- Explore how to transform yourself from a manager to a coach.
- Discover the top three key skills to becoming an effective coach.
- Learn the six steps required for a successful coaching conversation.

**Discussion:** Who's had the biggest influence on your life?

**Activity:** Share insights about influences and identify commonalities: Why coach? What is coaching? How is it different than managing or mentoring? What are coaching characteristics?

**Activity:** Complete self-assessment of management. Identify your coaching strengths. Discuss insights from assessment.

**Lecture/Video:** Top Three Coaching Skills and Coaching Presence

**Activity:** Share experiences of coaching and being coached.

**Lecture/Video:** The Six Steps of the Coaching Conversation

**Activity:** Receive questions for use in each step of the coaching conversation. Determine how this information and insights can be useful to improve staff performance. Develop an action plan.

### 3) Team Building

9-9:30 a.m. **Personal and Professional Significance Starts with Choice**

- The influence of options as it relates to the power of choice.
- The need to separate responsibility and fault.
- Suggestions on creating a culture of choice.

9:30-10 a.m. **The Behavioral Model of Identity — Actions — Feelings**

- Why individuals and organizations need to use their identity as the source of their activity.
- The pros and cons of personality assessments and the power of your core words.
- The role of purpose and passion.

10-10:30 a.m. **Understanding the Influence of Fear**

- Understanding the role of fear and self-doubt in our lives.
- Reveal fears of the leader and how to recognize the fear in employees.
- The disconnect between what leaders say and what employees see.

10:30-10:45 a.m. **BREAK**

10:45-11:15 a.m. **The Need to Let Go**

- The internal and potentially damaging desire to be right.
- Interpersonal obstructions of anger, resentment and blame.

11:15-11:45 a.m. **The Importance of Embracing the Crazy**

- The element of risk and how to support it.
- Why paying attention to the small, “insignificant” things helps avoid future problems.
- The power of asking “What would be possible if ... ?”

11:45 a.m.-12:15 p.m. **Significance Exists Within Our Impact on Others**

- The difference between “giving to” and “giving of.”
- Identifying the significant moments during the professional workday.
- Understanding how significance isn’t only found in the job one has but also within the person who holds the job.

12:15- 12:30 p.m. **Wrap-up**

### 4) Science of Teams

This workshop helps teams reset priorities, change communication patterns and develop deeper bonds. Team members will be led through fascinating activities, exploratory exercises and science-based communications. Participants will learn the groundbreaking new science of teamwork and how to benefit from it. Specifically covered will be the psychology of team dynamics, how to increase communication effectiveness and building rapport and loyalty.

## Financial Management

### Cost Recovery

#### 1) Cost Recovery

Recent reports indicate that firms are more profitable than ever. On top of this, the 2018 Mattern Cost Recovery Survey data show the legal industry has turned the corner on recovery pushback. Following analysis of data across areas of recovery, the data show that client pushback has stabilized and, therefore, so too has recovery across back and middle office areas.

How is your firm structuring its recovery in a strengthening market? Did you know that improving your billable recovery percentage can more than triple recovery over simply increasing the price of your firm's recoverable costs? It is time to gain the upper hand, learn about cost recovery in 2019.

#### **Learning Objectives:**

- Discover traditional and alternative recovery models for firm's back office functions and their various success rates.
- Discuss trends, recovery models and success rates regarding middle office operations, including legal research, litigation support, ediscovery and records management.
- Recognize how to wrap benchmarks into custom strategies for firm size and geographic location.

### Profitability

8–8:30 a.m.	Registration — continental breakfast
8:30–9:15 a.m.	Alternative billing methods
9:15–10 a.m.	Profitability analysis/cost accounting methods
10–10:20 a.m.	BREAK
10:20–11:15 a.m.	Issues Related to mergers and lateral hires
11:15 a.m.–Noon	Cash flow
Noon–1:15 p.m.	LUNCH



1:15–1:25 p.m.	Accounting issues of multi-office firms
1:25–2:10 p.m.	Partner compensation and the multi-tier partnership
2:10–2:45 p.m.	Ownership and allocation of the accrual basis assets
2:45–3:30 p.m.	Question and answer period

## Performance, Profitability, Innovation

Operational excellence means more than delivering quality legal services. The most successful law firms and legal departments are changing the way they deliver their legal services *and* the way they run their organizations.

This practical, hands-on workshop introduces you to an integrated approach to performance, profitability and innovation. Or, if you are in-house, to performance, productivity and innovation. Either way, you will learn where your organization sits on the PPI Maturity Model and how you can use Lean and process improvement as a foundation for key service delivery improvements.

We will tailor the workshop to meet the needs of your organization. The agenda can also be expanded to become a full-day activity.

### **Learning Objectives:**

- Understand operational excellence.
- Learn where they stand on the PPI Maturity Model.
- Learn how Lean can increase productivity, profitability and client service across the organization.
- Understand how integrating key initiative in pricing, process, project management, legal tech and more can drive improvements in operational excellence.

### **Who Should Attend?**

This workshop is suitable for attorneys in private practice and in-house, para-professionals and senior law firm and legal department managers. Everyone will leave the workshop with skills they can apply immediately to improve their own work and that of their organizations.

### **What's Operational Excellence? (15 minutes)**

- What does operational excellence really mean?
- What's driving the move to operational excellence? A look at trends in the legal market.
- *Interactive exercise:* What's your Business Case for Change?

### **The Performance, Profitability and Innovation Maturity Model (15 minutes)**

- Integrating your improvements: the PPI Maturity Model.
- *Breakout activity:* Where are you on the Maturity Model?

**Building the Foundation for Operational Excellence (1 hour)**

- Using a framework for improvement: DMAIC.
- Understanding value and waste in operational processes.
- *Breakout activity:* The eight wastes.
- Establishing your baseline and choosing your metrics

**BREAK (15 minutes)****Improving the Process (30 minutes)**

- Using maps to visualize your process.
- Setting up a mapping project.
- What outcomes to expect: case studies on process improvement projects involving how attorneys practice, as well as projects targeting the business/administrative processes that support the practice of law.

**Bringing It All Together (30 minutes)**

- Moving along the Maturity Model from reacting to innovating.
- Lean and process improvement as a foundation for innovation.
- *Breakout activity:* Using process maps to plan your innovations.

**Question and Answer Period (15 minutes)**

# Human Resources Management

## Strategic HR

Reviews the 7 myths and the 7 skills of strategic HR, the difference between the tactical (“Nuts and Bolts”) aspects of HR and HR’s role as a strategic partner, making it invaluable to the organization.

### **7 HR Myths**

1. “Human Resources Is the Voice for the Employees”
2. “You Have to Treat Everyone the Same Because Discrimination Is Illegal”
3. “Getting Sued Is the Worst Thing That Can Happen to an Organization”
4. “Good Employee Relations Means Never Offending Anyone”
5. “We Need to Develop All of Our Employees”
6. “Human Resources Is the Moral Compass and Legal Enforcer”
7. “Being an HR Expert Gets You to the C-Suite”

### **7 HR Skills**

1. Know Who Your Client Is
2. Get Your Clients Where They Want to Go
3. Understand and Practice Real Risk Assessment
4. Don’t Enable the Hypersensitive Employees
5. Develop Your Tops ... Get Rid of the Flops
6. Know the Law ... So You Can Get Your Clients Where They Want to Go
7. Educate Yourself in Business (Company, Industry, Strategic Planning and Finance)

## Workplace Culture

### 1) Great Places to Work

There is a lot of research about what makes a company a great place to work. When you boil it down, there are just five things that lead to loyal, engaged and high-performing employees. Find out what really makes employees do their best work and remain engaged over long periods of time.

Learn what the best companies are doing to be great places to work and get practices you can implement immediately. Create and maintain a successful organizational culture that endures leadership changes, mergers and acquisitions, and the other challenges inherent in a fast-paced, driven organization.

Benefits:

- Managers and employees give regular and timely feedback.
- Employees are engaged and doing their best work.
- Senior leaders and managers build trusting and mutually respectful relationships with employees.
- Employees, managers and senior leaders speak candidly.
- Departments learn from mistakes and create and follow best practices.
- Employees at all levels feel heard and “a part” of the organization.

## 2) Creating a Positive Workplace Environment

Here we’ll explore “road blocks” to organizational health, including issues related to leadership and management, morale, staff resistance versus buy-in, negativity and more, then learn some important tools for creating and maintaining a positive workplace environment.

**Topics and skill building:**

- The importance of employee morale and why it isn’t “touchy-feely” (and how to get it)
- Self-awareness and the art of personal growth: Adaptive skills for managers
- “And survey says...” The top 15 management skills
- “If you can’t say something nice ...” Combating triangulation and negativity
- Listening so people actually feel heard
- Successfully managing the “power differential” (so that your “open door policy” really works)
- Giving feedback effectively and receiving feedback non-defensively

High workplace morale and employee engagement aren’t just ‘feel good’ ideas: they are crucial to your firm's ability to sustain productivity, quality, collaborative relationships, retention, a positive firm culture, and much more. This workshop will focus on the building blocks of high morale and how administrators can help create a healthy law firm culture. Topics include: How to become a "learning organization" (and avoid the "Peter Principle") through developing trained leaders/managers; effectively managing the "power differential" that exists between leaders/attorneys and employees; and a focus on adaptive skills (emotional IQ) such as receiving feedback/information non-defensively, listening skills and giving feedback effectively.

**Learning Objectives:**

- Discover an understanding of the “Positive Firm Culture,” what it takes to get there, and why some firms fall short.
- Develop skills in giving feedback to staff and attorneys that allows the other person to avoid defensiveness.
- Recognize the ability to receive feedback with grace and non-defensiveness.

- Illustrate an understanding of the “power differential” and how to effectively manage it.
- Discuss tried and true strategies for helping firm members avoid triangulation and “recreational negativity.”
- Apply an easy 8-step process for training others on deep listening skills.
- Identify a new appreciation for “adaptive skills” (emotional IQ) and a four-stage process designed to help self and others improve these competencies.

## Diversity

Outline why tolerance and emotional intelligence are vital skills important to everyone’s success and health; and, how you can do it too!

- Why do most “diversity/tolerance” programs fail?
- why did Donald Trump’s message resonate with so many middle-aged whites that he won the White House?
- What are the “five skills of tolerance” necessary for any organization to thrive?
- Why are these “five skills of tolerance” critical to your own happiness as a human?
- How should you define “tolerance”?
- Why should you never require your employees to be “accepting” of each other?
- What is the difference between “diversity” and “tolerance”?
- What role does tolerance play in emotional intelligence, as well as in your “personal happiness” and “career success”?
- Why are emotionally intelligent and tolerant people many times more effective than others, and how can you do it too?
- What is the difference between “bullying” and “harassment”?
- How did a lack of tolerance put Kodak into bankruptcy?
- Are we humans wired to be bigots?
- What is “confirmation bias” and “subconscious bigotry,” and how do we overcome it?
- How can you distinguish between “stereotypes” and the “real differences” that exist between us?
- How do you deal with hypersensitive people?

This session will illuminate the statistics to diverse teams performing better. It will also discuss personal and institutional biases, while delivering a go-forward plan for building a truly diverse and inclusive organization.

### **Learning Objectives:**

- Demonstrate why diversity matters.
- Recognize unconscious biases and how to overcome them.
- Discover how to spot microaggressions.
- Identify what you can do to create a more diverse workplace.

## Employee Engagement and Retention

### 1) Avoid Quit and Stay Phenomenon

Walk by your employees' desks and see them surfing the internet? The bad news: They're not researching how to improve the company's results. They playing fantasy football or shopping for shoes. The good news: You can incent performance and raise morale. And you don't have to spend any money.

When turnover is low, employees still quit — they just don't leave the building. Quit and stay is the phenomenon of employees becoming disengaged and less productive while waiting for other roles to become available. Quit and stay is unfortunate, but avoidable phenomena.

- Do you know which of your employees are engaged and committed to your organization?
- Do you have a plan for those who are not?

#### **Learning Objectives:**

- Bring the fun and camaraderie back to work. Make work a place people want to be.
- Recognize performance without spending money.
- Find out why your employees stay with your organization and what would make them leave.
- Develop a loyal and committed workforce.
- Get the best from employees.

### 2) Where to Put Your Recruiting Dollars: The Top 5 Undisputed Sources for Finding Right-Fit Employees

Successful recruiting is both an art and a science ...and now it's also a battle to find, train and keep the finest, right-fit talent for your firm. With the ever-changing technologies and resources available to administrators, hiring managers, human resource professionals and recruiters for attracting and acquiring talent, it is vital that we make proactive, informed decisions as to where we place our recruiting dollars. Join this engaging, solution-filled session and receive a detailed workbook which includes checklists and resources for immediately implementing these strategies in your organization.

#### **Learning Objectives:**

- Examine how to recruit while you sleep, i.e. how to build a recruiting strategy that is dynamic and (nearly) self-sustaining
- Determine how to write recruiting ads which attract right-fit talent and deter those who are not right for your firm
- Identify the top five best recruiting websites and social media resources

### 3) Employee Engagement

You've learned to recruit, interview and even retain great employees to your organization. But are they engaged? Employee engagement is one of the most vital aspects to achieving successful organizational performance and profitability. Yet reputable research continues to show that only 20% of workers are genuinely engaged. In this highly educational, positive-minded and energetic workshop, gain immediately implementable content including a step-by-step approach for developing an organizational culture that will increase employee engagement, improve performance and further enrich profitability in your firm.

**Learning Objectives:**

- Discuss the modern definition of engagement.
- Determine the business case for employee engagement.
- Identify if you are engaged at work, i.e. a role model of engagement.
- Examine the five facets of an engaged workplace.
- Define the anatomy of an engaged employee.

#### 4) The Top Approaches for Maximizing the Value of Your Staff

In this solution-filled, fast-paced session, we will skip the 'should-do's' and deliver the exact 'how-tos' for maximizing the strengths of your staff. Designed specifically for the experienced and enthusiastic legal administrative professional, you will leave exceptionally prepared (and compelled!) to immediately implement the tools to deftly and positively engage all members of your organization!

**Learning Objectives:**

- Discover the top 9 best strategies for successfully bridging the proverbial generational gap
- Determine the top 7 best methods for keeping seasoned staff engaged, challenged and motivated.
- Demonstrate the top 5 best professional development approaches for educating and "upgrading" your staff.
- Describe the top 3 best techniques for effective succession planning.
- Discuss the absolute no. 1 best practice for managing change.

#### 5) Motivating Without Money: Strategies for Dramatically Improving Engagement and Productivity

It's time to look forward and find ways to strengthen and re-energize your staff. Motivating staff is always challenging, but the essential component of the firm's success is its human capital. We will illustrate (with a generous amount of appropriate humor!) how modern managers and leaders can measurably increase performance, improve morale and reduce fear – all without tapping the firm's budget.

**Learning Objectives:**

- Explain why money demotivates.
- Discuss why a great salary package, 401K and bountiful benefits are not always the answer.

- Identify the effective motivators for modern firms to answer the question: “So what do employees want?”

## 6) Fulfilling the Needs of the New Workforce

Does your organization struggle with motivation and retention of the new workforce? The world is changing, and organizations must adapt to the needs of the younger generations who are the future. This means the employer must be willing and able to adapt so its employees want to work for the organization. What does this mean? Join this session to examine what you can do to ensure your organization meets the needs of the future.

### **Learning Objectives:**

- Describe the values younger workers place on their own morals, ethics and beliefs and how translates to what they do on the job.
- Identify what it takes to coordinate the organization as a match to the needs of the future generations.
- Determine what younger workers want from the organizations they work for in the way of giving back to the universe and addressing societal needs.

## 7) Employee Benefits

Law firms face increasing pressure from existing employees and the recruitment of potential employees in terms of the strength of the employee benefit packages that strike the right balance of affordability and competitiveness. This session is highly interactive with other firms in the room and learning from what the crowd is doing coupled with some key recommendations from the presenter in terms of what the current market is providing and what to look for down the road.

### **Learning Objectives:**

- Identify what benefits are being provided today.
- Discover what is new in the market.
- Discuss areas where firms are cutting back.

## 8) Internal Investigations

The 2019 legislative overhaul of California’s harassment laws puts increased pressure on human resources professionals and other internal investigators to acquire — and maintain — the skills necessary to ensuring a legally compliant response to internal hostile environment and discrimination claims. The new statutory affirmation that a “stray remark” may be sufficient to prove discrimination, combined with the expanding definition of “hostile environment harassment,” means that now more than ever, employers must be able to clearly demonstrate that the enforcement of equal employment opportunity and anti-harassment policies is an essential part of the organization’s mission — and nothing demonstrates that more immediately than a good faith grievance procedure administered by trained investigators. During this nationally renowned, engaging and interactive seminar, your



presenters — all senior employment law attorneys with extensive experience as investigators and trainers — will take you from claim intake through issue resolution.

Who should attend: human resources professionals, security personnel, loss prevention and risk management personnel, and in-house counsel.

### **Learning Objectives:**

- Determine how to handle claim intake: Ensure that you use this critical opportunity to identify the issues being alleged, how to work with a reluctant claimant, gather the material facts presented by the claimant, avoid the pitfalls of a secrecy pact, and create appropriate confirming documentation.
- Discuss whether (and how) to implement interim actions: It's crucial to determine whether the respondent should be placed on administrative leave, and under what conditions. We will include specific content on threat investigation concerns and related administrative leave issues.
- Explain when to limit the scope of an investigation: Understand the "art" behind ordering interviewees to appropriately limit the scope of the investigation process, while minimizing the potential for retaliation.
- Recognize how to ask effective questions: Through participation in a detailed, seven-part sexual harassment case study, taking participants through each of the key aspects of a professional internal investigation (claim intake, respondent interview, and witness interviews), with exploration of implicit and confirmation bias concerns.
- Distinguish how to use credibility assessment tools, including assessment of corroborating and circumstantial evidence, and the interesting challenges posed by party and witness demeanor concerns.
- Demonstrate how to apply the applicable burden of proof for alleged claims.
- Illustrate how to write comprehensive, legally defensible investigation reports.

### **Outline**

8:30–9:10 a.m.

Introduction / Burden of Proof

9:10–9:40 a.m.

Your Initial Meeting with The Employee Raising the Issue

9:40–10:10 a.m.

Deciding If A Formal Investigation Is Necessary/Case Study Part 1

10:10–10:25 a.m.

BREAK

10:25–10:40 a.m.

Investigating Specific Kinds of Issues

10:40–11:10 a.m.

Organizing and Planning the Investigation/Case Study Part 2

11:10–11:30 a.m.

Interim Actions/Administrative Leave Pending Investigation

11:30–12 p.m.

Case Study Part 3

12–12:45 p.m.

LUNCH

12:45–1:15 p.m.

Interviewing the Accused

1:15–1:45 p.m.

Case Study Part 4/Interviewing Witnesses/Case Study Part 5 and 6

1:45–2:15 p.m.

Assessing Credibility

2:15–2:30 p.m.

BREAK

2:30–3 p.m.

Reaching A Conclusion/Case Study Conclusion – Part 7

3–3:20 p.m.

Making A Recommendation/Drafting Investigation Report

3:20–3:40 p.m.

Implementing the Results of The Investigation

3:40–3:50 p.m.

Documentation Retention

3:50–4 p.m.

## Attorney-Client Privilege Issues/Concluding Thoughts

**Activity:** Sexual Harassment Hostile Environment/Retaliation 7-Part Case Study reviewed and completed throughout the day.

### 9) It's Your Career — Manage It

Many professionals are waiting for their boss or mentor to provide the training, coaching and exposure they need to advance their career. The truth is it's up to each employee to create opportunities, gain visibility and get the feedback they need to strengthen their performance and position themselves for future roles in the organization. This session provides the specific language to use to establish candid relationships with direct supervisors, mentors, coaches and coworkers. Employees will know what to say to get more of what they want and less of what they don't at work. Managers and coaches will get the language and tools they need to guide direct reports and coaches into a future they're excited about. Plus, you'll get more feedback that enables you to take control of what you put in front of others and the impressions you create. And as a result, you'll build long-lasting business relationships that outlast economic downturns, miscommunication and conflict.

#### **Learning Objectives:**

- Discover how to start new relationships powerfully and strengthen existing relationships.
- Create more trust in your office and business relationships.
- Identify how to take charge of your career.
- Generate more feedback and provide feedback in a way both you and the recipient are comfortable.
- Discuss ways to have productive coaching relationships and meetings to get the most out of mentoring and coaching relationships.

## Handbook Updates

9–9:10 a.m.                      Introductions, Agenda Review, Meeting Expectations

9:10–10:45 a.m.                Session 1: Understanding the Basics

Regardless of the size of your firm, there are certain basic concepts that must be discussed before you even begin to draft or revise the handbook. These include tone, mode of publication, purposes to be served, etc. In addition, there are certain basic policies legally that must be included (e.g., EEO, PTO, compensation, leaves of absence, etc.) in the handbook.

#### **Learning Objectives:**

- Identify your mode of handbook publication (electronically, hard copy, intranet, etc.).
- Identify legally required policies that must be included in your handbook. Determine the best ways to communicate based on other styles.

- Discuss traps into which we fall in drafting these legally required policies.

10:45–11 a.m.           BREAK

11 a.m.–12:15 p.m.    Session 2: Taking Your Handbook to the Next Level

While the policies discussed in Session 1 must be included, the policies discussed in Session 2 really will set your firm apart from others and, if done well, will communicate clearly to your employees what matters culturally. These policies will stress not only legal concepts but also practical considerations to be considered inside of the law firm environment. Examples of these policies include electronic communications, appearance, workplace violence, etc.

**Learning Objectives:**

- Identify what policies really need to be included in your handbook based on individual firm needs.
- Discover practical ways to communicate important messages without sounding overbearing.
- Develop policies to communicate to your law firm employees what really matters inside of your firm.

12:15–12:30 p.m.      Action Plan: Next Steps

**Harassment**

**1) Law Firm Harassment Prevention and Correction**

9–9:10 a.m.            Introductions, Agenda Review, Meeting Expectations

9:10–10:45 a.m.      Session 1: Understanding the Law and the Practical Impact of Harassment in the Workplace

Ripped from the headlines ... we’ve seen it everywhere — workplace harassment. Law firms are not immune. We all need to understand what the law says and truly appreciate the impact that harassment, discrimination and retaliation can have on our law firm environment. Regardless of the size of your firm, there are certain universal concepts to which your firm must adhere to avoid these issues. These concepts will be discussed in the context of a “quiz,” which practically and realistically covers all forms of harassment, not just sexual harassment.

**Learning Objectives:**

- Discuss the current state of the law regarding harassment, discrimination and retaliation.
- Identify common issues in the law firm environment which give rise to harassment claims.
- Discuss traps into which we fall regarding retaliation.

10:45–11 a.m.           BREAK

11 a.m. –12:15 p.m.    Session 2: The Practical Impact of Harassment and Legal Responsibilities of Law Firm Management

In addition to a continuation of the discussion of the law and a robust examination of inappropriate conduct, this section will focus on the “5 Rs” of law firm management responsibility:

1. **Refraining** from inappropriate behavior, broadly defined.
2. **Responding** proactively to inappropriate behavior, even in the absence of a complaint.
3. **Reporting** all complaints to human resources (or the appropriate designated person/people within the firm), even if the employee requests confidentiality and/or asks that nothing be done.
4. **Remedying** inappropriate behavior by focusing on inappropriateness, not illegality.
5. **Refraining from retaliation**, broadly defined.

12:15–12:30 p.m.      Action Plan — Next Steps

## 2) Bully and Sexual and Illegal Harassment Law

Bullying & Sexual and Illegal Harassment law ... including the most recent and most important developments in this area of the law in a unique, practical, entertaining and humorous style. We will not only inform you of what the law requires but will use his almost 40 years of Human Resource and Employment Law experience to tell you how to use this information IMMEDIATELY!

- Why has there been such an EXPLOSION of HARASSMENT claims in the news?
- How has the DIGITAL WORLD changed the parameters of Harassment/Bullying?
- How should employers deal with SOCIAL MEDIA ISSUES?
- When does “JOKING AROUND” become “HARASSMENT”?
- What does it mean to be “HYPERSENSITIVE,” according to the U.S. Supreme Court?
- What is the difference between “BULLYING” and “HARASSMENT”?
- What is required to prove a case of ILLEGAL HARASSMENT?
- What is GENDER STEREOTYPING?
- How have the courts treated discrimination and harassment based on SEXUAL ORIENTATION?
- What is the difference between HOSTILE ENVIRONMENT and QUID PRO QUO?
- Why is RETALIATION now the #1 harassment charge filed with the EEOC?
- What constitutes RETALIATION?
- How can you REALLY prevent such problems from happening?
- What is the LEGAL DEFINITION of “OFFENSIVE”?
- When are employers responsible for the “OFF DUTY ACTIVITIES” of employees?
- Is it legal to discipline a man for wearing MAKE UP to work?

- What is “ILLEGAL HARASSMENT” ... and what ISN'T?
- When is HARASSMENT TRAINING REQUIRED?

## 2) Learn, Lead and Prevent: Your Role in Creating a Harassment-Free Workplace

During a highly interactive two-hour training, executives, managers, and supervisors will learn to fully understand the role they must play in creating a harassment-free workplace, and their responsibility to address issues and complaints that arise.

Our content incorporates the most up-to-date legal standards and best practices, ensuring comprehensive compliance with mandatory training requirements.

The June 2016 Equal Employment Opportunity Commission Task Force Report on Sexual Harassment Prevention Training suggested that the most common form of training – delivered online, with a focus on liability and risk management – does very little to prevent gender-based abusive conduct. The results of the task force validated what the lawyers at Hirschfeld Kraemer LLP have known and practiced for over 20 years: that true prevention training must be delivered live in a highly interactive format that meaningfully challenges “business as usual” workplace stereotypes of gender and power. This supervisor program offers powerful lessons in leadership and response to address gender discrimination, sexual harassment and abusive conduct.

### Agenda

- Thoughts on “Abusive Conduct”
- Sexual Harassment – *New Definitions, Practical Examples, Rights and Obligations*
- Gender identity, gender expression, sexual orientation: law and practice in combating discrimination
- The Bullying Epidemic – examples, effects, and response
- #MeToo?...#YouToo! Speak Up, Step Up, Lead

## 3) Workplace Violence Prevention Team Training

For those law firms interested in the formation of a new Workplace Violence Prevention Team we offer a comprehensive full-day training program covering warning signs, external (workforce) risk factors, threat investigation techniques and related legal standards, domestic violence and stalking concerns, liaison relationships with external law enforcement, EAP resource utilization, control, stabilization and intervention techniques, active shooter considerations, and the nexus between disability law and accommodating the “troubled” employee.

Our training delivery method is highly interactive, and involves an immersive experience incorporating role-play, case studies and interactive exercises. The team training program includes table-top exercises

designed to challenge and engage participants.

Our entire objective is to shift “paradigms,” to change the way that senior leaders and managers – and most people generally – think about the issue of workplace violence. All too often, workplace violence is thought of as synonymous with “workplace homicide,” and this juxtaposition makes people feel helpless to do anything to stop what seems like fate or “bad luck.”

This is certainly not an accurate or helpful viewpoint. Rather, workplace violence needs to be “redefined,” so that lower level actions by the “troubled” employee are identified, assessed, and dealt with long before that same individual escalates to being “troubling,” and acts out through external victimizing behaviors. We believe that the education of front-line supervisors and mid-level management is essential to preventing workplace violence, as it is those individuals who will first encounter the early warning signs that are often mistaken merely for low-level performance concerns: tardiness, absenteeism, diminished quality of work, increased incidents of injury, poor relationships with co-workers, acting out of frustrations in an impulsive, physical manner, etc. While it is likely that none of the above are, by themselves, a guarantee that an employee is about to explode into an act of violence against others, none of these behaviors is acceptable, and each should be dealt with proactively from a managerial perspective. In short, the prevention of workplace violence starts with excellent leadership from all levels of management, as exemplary supervision will identify problem situations early, allowing time for legal, security and managerial considerations to be applied to the subject concern.

#### **Team Training Learning Objectives:**

- How to establish a Workplace Violence Prevention Team.
- What roles should firm administrators, human resources, legal, security, and operations play in the effort?
- What constitutes a "zero tolerance" policy, and how do you enforce it?
- What are the required elements of an organization-wide prevention training program?
- What methods should be used to intervene in a manner that will diminish, rather than exacerbate, the potential for violence?

#### **Curriculum\***

- Review of the conduct that constitutes workplace violence (a refinement and redefinition of reportable conduct);
- Review of different types of workplace violence (Types I through IV pursuant to OSHA guidelines);
- Discussion of profiles of potentially dangerous employees;
- Discussion of early warning signs and risk factors that heighten the potential for workplace violence;
- Review of the interplay between conduct in violation of law firm policy, and disability discrimination law;
- Discussion of fair discipline, and methods of communication designed to inhibit and diminish potential for workplace violence;

- Discussion of termination procedures related to the troubled or difficult employee, and the coordination between line management, human resources and security (when assessed as needed); and
- Stabilization and control techniques when faced with the fearful, frustrated or predatory employee, using role-play and interactive teaching methods.
- Table-top exercise: the “troubled” employee and domestic violence critical incidents

\* We also offer a half-day version of this curriculum for managerial employees.

### **Agenda**

8:30AM — 8:45AM

Introduction/Explanation of ANSI standards re Workplace Violence Prevention Teams

8:45am — 9:15am

Workplace Violence Essentials — applicable laws, policies, and review of OSHA Typologies

9:15am — 9:30am

Review of Team Member Roles and Responsibilities

9:30am — 11:00am

Discussion of Behavioral Warning Signs, Escalation Factors, Mitigation Factors in Assessing Risks

10:00am – 10:10am - BREAK

11:00am — 11:15am

Domestic Violence — Definitions, Challenges, Strategic Responses

11:15am — 11:45am

Internal Investigations of Violence/Threat Concerns —Special Considerations

11:45am — 12:15pm

The nexus between the ADA, mental health issues, and disability-induced misconduct

12:15pm — 12:30pm

**Q & A**

12:30pm — 1pm - LUNCH BREAK (Lunch will be provided.)

1:00pm — 1:30pm

Discussion of fair discipline, and communicating performance issues with the "troubled" employee



1:30pm — 1:45pm

Stabilization and Control Techniques related to the Frustrated and Predatory (Bullying) Profiles

1:45pm — 2:15pm

Termination procedures relating to the troubled or hostile employee

2:15pm — 2:30pm

Post-termination procedures related to the potentially dangerous employee — Coordination with line management, firm administration, legal, security and external law enforcement

2:30pm — 2:45pm - BREAK

2:45pm — 4:30pm

CASE STUDIES (TABLE TOP EXERCISES) — Including:

- (1) TROUBLED EMPLOYEE/MENTAL HEALTH CONCERN;
- (2) INTERPERSONAL RELATIONSHIP VIOLENCE
- (3) Added topics pursuant to attendee feedback during prior sessions

4:30pm — 4:45pm

Discussion of next steps and curriculum for manager, supervisor and all employee training

4:45pm — 5:00pm

Conclusion and Wrap-up

## 5. Workplace Violence

It is difficult to get through any week without hearing a story about an act of workplace violence or an active shooter situation that occurred somewhere in the world. Workplace violence is a potentially serious risk to any business or firm resulting in the potential for reduced productivity, decreased revenue and loss of reputation. Higher turnover results from the stress and potential traumatic after-effects of a violent incident. This interactive session includes important information to assist you in protecting your firm, including discussing types of workplace violence that occur and the characteristics and warning signs of potential violence. Additionally, steps that all firms and businesses can take to prevent acts of violence from occurring and discussing what to do if an active intruder enters your office or building will round out this session.

## Substance Abuse

### 1) Marijuana: Are Your Policies in Order?

As more and more states legalize recreational and medical marijuana, employers are faced with mounting issues. Aside from having to understand the local, state and federal laws affecting employment settings and the use of marijuana, employers must also make decisions regarding whether to test, how to test and when to test employees for marijuana use and impairment.

Whether it is a zero-tolerance workplace or a workplace that permits use of medical marijuana by mandate of law, the employer must be familiar with local, state and federal laws and drug testing protocols.

This presentation will set forth information on how marijuana is used, how it is metabolized, the difference between active THC and active and inactive metabolites and how to read a toxicology report. It will also discuss studies related marijuana use and impairment and the types of applicable workplace law. It is recommended for all employers and their administrative legal teams or human resource officers who are responsible for marijuana testing policies, protocols, hiring and termination decisions.

For the lengthier half-day and full day workshops, the participants will work in facilitated small groups to review and analyze marijuana workplace use fact patterns and develop pertinent workplace policies and laws.

**The audience and participants will be able to:**

- Analyze how marijuana is used, how it is metabolized, the difference between active THC and active and inactive metabolites and how to read a toxicology report
- Review when, why and how to conduct testing for marijuana in the workplace
- Identify new developments in testing and pending legislation on testing in the federal and federal contractor scenario
- Identify data and statistics related to marijuana use in the workplace
- Identify marijuana recreational and medical laws across the country
- Explain marijuana toxicology
- Explain local, state and federal workplace laws and cases related to marijuana use and testing
- Apply local, state and federal workplace laws to fact scenarios in a group setting
- Review the existing workplace marijuana policies for potential revisions

## 2) Cannabis and Cannabidiol (CBD) Differences: Its Impact on the Workplace

The legalization of Hemp through the 2018 Farm Bill has caused an excess of CBD products for sale including on the internet. Products that include oils, lotions and other potions are being used for humans and animals alike. What is the Farm Act 2018 and how does it relate to the availability of CBD products? Has the passage of the Farm Bill affected the scheduling of Hemp? How does cannabis differ from CBD? What is science saying about both medical marijuana and CBD for illnesses and ailments? How does the FDA and the DEA treat CBD? How is workplace testing affected using CBD? What should legal administrators and managers do about testing results? Does a positive test result for CBD violate the federal or workplace zero tolerance laws and policies? These are some of the questions that will be addressed in the presentation.

## Performance Management

### 1) Law Firm Performance Management: Yes, It Does Matter ... A LOT!

9–9:10 a.m. Introductions, Agenda Review, Meeting Expectations

9:10–10:45 a.m. Session 1: Documenting Discipline

We've said it to our law firm managers too many times to count: "Have you documented it?" Far too often, the answer is no. As we know, proper documentation is crucial for myriad employee relations issues. And when it comes to discrimination, retaliation and other wrongful discharge claims, legal liability often turns on the documentation. But it's not enough simply to document, document, document. Poor documentation is as dangerous as no documentation. The key is not only what you say but also how and when you say it.

#### **Learning Objectives:**

- Discuss why documenting discipline is so important.
- Examine the five key elements to any disciplinary document.
- Analyze common mistakes in drafting these critically important documents.

10:45–11 a.m. BREAK

11 a.m.–12:15 p.m. Session 2: The Law Firm Performance Appraisal Process

Now more than ever, letting your employees know how they are performing is one of the most important aspects of any manager's job. Whether the employee is doing a great job or needs significant improvement, it is critical that law firm managers know how to appropriately document the employee's performance and realize the importance of carefully drafting the appraisal. This section will explain why appraisals are important, describe the drafting process and identify common mistakes made in the drafting process. It also will identify the legal risks associated with a manager's rushed or poorly worded appraisal.

#### **Learning Objectives:**

- Analyze why performance appraisals are so important in the law firm environment.
- Examine ways to keep employees motivated and how performance appraisals are crucial to ensure that motivation.
- Analyze common mistakes in the performance appraisal process.

12:15–12:30 p.m. Action Plan — Next Steps

### 2) Performance Management: Bringing Out the Best in Employees

As managers, we give feedback to employees in hopes of creating commitment to doing more of what's working and less of what's not, as well as a sense of buy-in, understanding, and dedication. Unfortunately, our efforts at providing feedback often backfire, creating hurt, confusion, or apathy. Here we'll offer strategies to maximize the effectiveness of workplace feedback and learn the secrets to motivating employees toward excellence.

### Topics and skill building:

- The positive workplace environment
- Coaching: Getting the best from your people
- Giving feedback to employees without lowering morale
- How to have that second and the third conversation (progressive conversations versus “camping”)
- The power of reward, recognition and acknowledgement – and a secret on what not to do!

In this workshop we will dive deep into the skills and the psychology behind successful performance management practices. Topics include: How to give feedback with clarity and compassion about behaviors, impact, and replacement behaviors (part of the B.I.R.C.H. model), instead of about character, intent, and internal states; navigating which behaviors should be handled by managers versus the ones that should be dealt with between employees; how to have “progressive positive conversations” when correcting employees, as opposed to creating negative patterns through “camping” (repeating the same interventions over and over); how and when to offer praise and appreciation; best practices around documentation and working in conjunction with HR; actual hands on practice in class; and more.

### Participants will learn how to:

- Give corrective feedback to employees (and others) in a way that doesn’t create automatic defensiveness
- Choose between five options when employees bring concerns (decline; coach; mediate; hold; own)
- Provide appreciation and praise in eight different general categories to better meet the needs of all
- Have single “crucial conversations,” and know how the second and third conversations should differ
- Prepare for and conduct a B.I.R.C.H conversation with employees (we will practice in class!)

## 2) Getting the Best from Employees

**Coaching and developing employees is the hardest thing managers do.** Being a good coach requires trust, patience, and takes time, time you may not feel you have. The adage, “if you want something done right, do it yourself” may at times feel true, but it also leaves managers overextended, unfocused and with an underdeveloped staff. Giving direct reports an appropriate amount of responsibility and accountability is the only way employees develop and the only way managers get out of the weeds and can focus on the work they’re supposed to be doing- leading people and departments. A lack of growth and development opportunities is the greatest reason for employee turnover. If you want your staff to stay and be engaged, they need to feel that they are developing new skills and abilities.

**Learn how to coach and delegate appropriately so both managers and direct reports get what they need.**

Managers get results and more time to focus on their own accountabilities, and employees learn new skills and become more autonomous.

### Outcomes to Expect

- Create a more satisfied and engaged long term work force.
- Develop employees for long term growth and mobility.
- Have more time to focus on one's own responsibilities.
- Create environments of accountability and unprecedented results.
- Get the best from employees.

### AGENDA:

1. Determine what will improve employees' performance.
2. Provide fresh, constructive performance feedback to long-term employees.
3. Incent improved performance with staff members who have hit the salary cap.
4. Help employees honestly assess their own performance.
5. Have candid conversations with employees without wishing you had taken medication.

## 3) Knocked 'Off Balance:' Modern Strategies for Managing Focus and Productivity-Not Just Time!

The term 'work-life balance' is now officially defunct! With the myriad of varying employee priorities, commitment levels and work styles, the focus has shifted from 'live to work' to 'work to live.' Join this solution-filled, engaging session to explore modern approaches that leaders in the business of law can adapt while still ensuring productivity and profitability.

### Learning Objectives:

- **Identify how organizations selected as *Best Companies to Work For* provide life balance while still improving productivity and profitability**
- Discuss how to 'go retro' and find out why these five 'old school' approaches for getting it all done deserve a revival
- Implement 'it's not about balance- it's about outputs!'

### Coaching and Praising: Modern Approaches for Developing Productive, Self-Directed Employees

The role of the modern legal management professional has changed from being the manager or boss, to one much more similar to that of a professional coach. Instead of telling people what to do and then ensuring that the work is done, the effective legal management professional helps others learn to make decisions for themselves. Exceptionally successful law firms are changing the culture of their work environment to one based more on the concepts of teamwork and employee-centrism. Employee-centric workplaces have organizational cultures rich in teamwork, professionalism and positive recognition. This approach has been proven to be a highly effective foundation for increased productivity, performance, employee retention and profitability.

### Learning Objectives:

- Discover the top five winning strategies for developing productive, self-directed and engaged employees from the world's most successful coaches.

- Discuss how to coach for improvement by recognizing "coachable moments" with your employees.
- Discover the word-for-word coaching approach that will result in a profoundly, positive improvement of employee behaviors and choices.

## Generations

### Perception of the World

PERCEPTION OF THE WORLD depends largely upon the era in which we were raised ... which greatly distorts reality for all of us. We will not only show you why there is such a stark difference between us in how we view the world based upon our age in a practical, entertaining and humorous style, but we will show you what skills to use to overcome such misperceptions IMMEDIATELY!

- Why do our differences in AGE play such a HUGE FACTOR governing our PERCEPTION?
- How does NEUROLOGY explain all of our different viewpoints?
- Why can you not always believe what you see?
- What are the differences between Radio Babies, Baby Boomers, Gen-Xers and Gen-Yers?
- Why do Radio Babies see things so DIFFERENT from Gen-Yers?
- How are Baby Boomers "PRIMED" to see the world compared to Gen-Xers?
- How can our differences in age KILL your organization's CRITICAL DECISION MAKING?
- What is "SUBCONSCIOUS BIGOTRY" ... and how do we OVERCOME IT?
- What SKILLS do we all need to use in order to overcome this BATTLE BETWEEN THE AGES?

## Legal Industry

### Alternatives to Secretarial Support

#### Learning Objectives:

- Reverse the *accidental adversarial* relationship between legal secretaries and attorneys.
- Shift the attitude of your legal secretaries/assistants to create greater productivity and workability when using new models.
- Walk away with new tools and strategies to implement within your firm to hire, use and retain the legal secretary of the future.

#### WORKSHOP OUTLINE

##### Session 1: The Role of the Legal Secretary

- Begin by looking at the evolution of the role of the legal secretary who works in a variety of law firm sizes and assignments.
- Delve into the traditional model of a legal secretary and look at what works and does not work.
- Discuss the most effective way to use legal secretaries in the future.

- Compare and analyze the pros and cons of alternative secretarial models.
- Customize interview questions and criteria for hiring the legal secretary of the future.
- Overcome common obstacles that lose top legal secretaries when implementing new secretarial models.
- Design customized training and tools to enhance efficiency and productivity when using new models.

### **Training Format**

- One 3.5-hour workshop
- Each training session would include 2.5 hours of training and 1 hour for a workshop, as well as questions.

## Legal Industry Trends and Challenges

1. Competition, fee structures, succession planning, recruitment and retention, maintaining profit margins, and controlling expenses are just some of the challenges firms are facing on a daily basis. A National Legal Sector Benchmark Survey will analyze trends and issues facing the legal sector. In the six years since its inception, the survey results have provided an examination of the key drivers affecting law firms, as well as insight into the priorities of associates gained through their National Associate Survey. From technology and flexible workspaces to business development initiatives and future trends, you'll be provided with a deeper look into the results and their impact on law firms nationally. This session will offer insights on the continued shifts within the sector, and how law firms are making significant changes to remain competitive.

### **Session Sample Agenda (to be customized per speaking engagement)**

9:00 – 9:15

*Welcome and Intro*

9:15 – 9:45

*Exercise* – Vote taken on what attendees think are the top issues related to business competition

*Objective* – Identify the top three issues related to business competition and how firms are improving attorney business development opportunities

9:45 – 10:15

*Objective* – Review how business and operational decisions are being made differently today and how smart decisions and change can dramatically improve operations, client services, internal collaboration, and overall business and profitability.

*Exercise* – Facilitate small group discussions on how they have or have not seen this done in their respective firms

10:15 – 10:45

*Objective* – Examine specific examples and statistics on how law firm leaders are consensus building internally to affect future change.

*Exercise* – Role play activity on how an “associate,” “partner” or “managing partner” would respond to certain challenges and situations

10:45 – 11:00 Break

11:00 – 11:30

*Objective* – Explain how statistics and trends can assist management in evaluating tough decisions and guiding the firm through the process

*Exercise* – Naming a specific tough decision, small groups are formed and asked how they would solve to resolution

11:30 – 12:00

*Objective* – Discuss the future of the legal industry: In the next 10 years, where do you see dramatic changes occurring in the legal sector?

*Exercise* – Participate in a legal sector future trend survey – then compare against national predictions

12:00 – 12:30

Wrap Up/Questions/One future trend exercise

## **2. The Future of the Legal Profession**

The legal profession is in turmoil. Historically recession-resistant, 2008 signaled the first-time revenues plummeted in both litigation and transactional work. Much of this will not return, as simultaneously, creative vendors worldwide began using powerful technology and new organizational and pricing models to reshape the very nature of the practice.

Outsourcing companies are chipping away at the commodity-level work, while IBM’s “Watson” super-computer could turn every small-town generalist into a Wachtell-caliber expert. Law school admissions are plummeting, and many middle-market firms are reeling while nimble firms restructure to meet the challenges of the new economy.

It’s a profession-wide perfect storm, creating both agony and opportunity internationally. Law firm leaders must peer into the future and prepare for next month, next year, and the next big thing.

What’s here now or coming soon? How can you use social media tools to stay ahead of the curve and powerful marketing strategies to dominate narrow and profitable markets?

This presentation will answer some of these questions and suggest some possibilities for the future.

## **The Power of Core Values & Ethics in the Modern Law Firm**



## Learning Objectives:

- Discover Why Law Firm Core Values and Ethics Policies Must Lead Your Employee Recruitment, Engagement and Retention Efforts in 2018
- Learn How “Best Law Firms to Work For” Capitalize Upon Their Ethics Policies to Create Workplaces That Attract and Keep Top Talent
- Step-by-Step Approaches: Creating a Law Firm Workplace Culture Guided by Ethics and Core Values

## Strategic Planning

### HALF-DAY SAMPLE AGENDA

9-9:30 a.m.	<b>Demographic and Economic Review</b> Where are we and what does this mean? What are the common measurements?
9:30-10 a.m.	<b>Governance and Management</b> Firm management, leadership
10-10:45 a.m.	<b>Defining Expectations</b> Personal productivity, client development
10:45-11 a.m.	<b>BREAK</b>
11-11:45 a.m.	<b>Defining Our Market Focus</b> Markets, message, method, opportunities, follow-through
11:45 a.m.-12:15 p.m.	<b>Recruiting of Laterals</b> Do we need a lateral strategy?
12:15-1 p.m.	<b>Next Steps</b> Team update meeting, coaching program

### FULL-DAY SAMPLE AGENDA

8:30-8:45 a.m.	<b>Rules of Engagement</b> Thinking like an owner
8:45-10:15 a.m.	<b>Profit Is Not a Four-Letter Word</b> Overhead burden, break-even and production expectations (45 minutes) Review profit per timekeeper for YTD (45 minutes)
10:15-10:30 a.m.	<b>BREAK</b>

10:30 a.m.-Noon	<b>Compensation Is Not a Sacred Cow</b> Identifying issues with current system (45 minutes) Options for improvement in incentives and rewards (45 minutes)
Noon-12:30 p.m.	<b>LUNCH</b>
12:30-1 p.m.	<b>Welcome New Partners</b> Review rules of engagement, welcoming exercise
1-2:30 p.m.	<b>Culture Eats Strategy for Breakfast</b> Assessment of alignment survey results (60 minutes) Confirmation and adjustment of culture values (30 minutes)
2:30-2:45 p.m.	<b>BREAK</b>
2:45-4 p.m.	<b>Markets, Message, Methods</b> Where do we get clients now? How do expand this? (45 minutes) Connecting firm and individual focus: What can we do better? (30 minutes)
4-4:30 p.m.	<b>Next Steps</b> Accountability

### 3-DAY SAMPLE AGENDA

Thursday Afternoon	<b>Sustained Adaptability</b>
• 1:30-3 p.m.	Program introduction, leadership, handling growth and change, generation gaps
• 3-3:15 p.m.	BREAK
• 3:15-4 p.m.	Breakout Session 1: How do we define our growth options?
• 4-5 p.m.	Collect input and discuss growth options
Friday Morning	<b>Strategic Planning</b>
• 9-10:15 a.m.	Strategic focus: brand identity, lawyer development, practice groups
• 10:15-10:30 a.m.	BREAK
• 10:30-11:15 a.m.	Breakout Session 2: Do we need internal escalators to success?
• 11:15 a.m.-Noon	Collect input and discuss development plans, mentoring, skill training
Friday Afternoon	<b>Practice Groups</b>
• 1:30-2:30 p.m.	Practice group structure overview and why they are important
• 2:30-2:45 p.m.	BREAK
• 2:45-3:30 p.m.	Breakout Session 3: Practice groups: Should we focus or broaden our approach?
• 3:30-4:30 p.m.	Collect input and define practice group structure as a growth option
Saturday Morning	<b>The One Firm Firm</b>
• 9-10:30 a.m.	How we can become a “one firm firm” and what that will mean.

- 10:30-10:45 a.m. BREAK
- 10:45 a.m.-Noon Strategic planning process application and next steps

## Shareholders — Objectives, Obligations, Expectations

9-9:15 a.m.	<b>Rules of Engagement</b> Thinking like an owner
9:15-10:30 a.m.	<b>Firm Objectives</b> SWOT analysis: What it is, relevance to law firms, collect individual input (30 minutes) Common ground: Where do we agree and what are the key items? (45 minutes)
10:30-10:45 a.m.	<b>BREAK</b>
10:45 a.m.-Noon	<b>Leadership/Shareholder Obligations</b> Article (handout): Review and define the common obligations of shareholders (30 minutes) Application to our firm: How do we see the application of these obligations at our firm? (45 minutes)
Noon-1:15 p.m.	<b>LUNCH</b>
1:15-2:45 p.m.	<b>Expectations</b> Subjective scorecard review (15 minutes)  Who scored what and why? (45 minutes) Definitions and priorities (30 minutes)
2:45-3 p.m.	<b>BREAK</b>
3-4 p.m.	<b>Accountability</b> How do we hold ourselves accountable? (30 minutes) Who will do what by when? (30 minutes)

## Business Development/Marketing

### History of Law Firm Marketing Ethics

We all know lawyers should behave professionally and ethically. However, there are few bright lines; one person's "puffery" is another person's lie.

The rules are changing fast as technology creates more opportunities – and risks. How can a firm aggressively attract new clients yet stay in compliance? Join this entertaining and educational session to

explore the crazy history of law-marketing ethics, discussing the most-outrageous marketing and most-important Supreme Court cases.

#### **Learning Objectives:**

- Discuss the best (and worst) examples of law firm marketing since the 1700s when lawyers minted their own money to proclaim their trial victories
- Analyze the rules to ensure your firm's marketing efforts are both effective and ethical

## **Marketing Ethics**

Lawyers have been using the full range of marketing tools to generate awareness and new business since the 1700s when lawyers minted their own legal currency, actual coins, to advertise their big trial wins. Abe Lincoln widely advertised his law practice, and held seminars, and gave client-development speeches! Since then, lawyers have used every trick in the book, some wildly successful, others with disastrous results. And the ethics rules have evolved to reward certain behaviors and punish others.

From *Bates* to the "Bitches from Hell," from horseshoes to hand grenades, and from Lincoln to "Life is short. Get a divorce." -- this fun presentation will show examples of the best and worst marketing in the past 300 years, covering all the landmark US Supreme Court cases and precedent-setting marketing programs and tools. We will bring the actual marketing materials they used from the 1700s, 1800s and 1900s, including the actual ancient coins, condoms, Lincoln's newspapers, and topless-model matchbooks. There will be a drawing for a turn-of-the-century patent-lawyer letter opener.

#### **Strategy and Branding**

Branding and differentiation is among the hottest topics in legal marketing — that is, how to stand out in a crowded marketplace, using the full range of marketing tools, including websites and social media.

This program will discuss how to use today's most-powerful techniques to market yourself, your practice, your group, office, or firm. Whatever you do, wherever you go, you have to get noticed to succeed, and this fun program will show you precisely how to do so.

Help guide your firm to build a strong brand that stands out in a positive and client-oriented way. Understand how to identify a unique differentiation message, supported by networking and social media.

This program will cover:

- Strategies to make your website and marketing more eye-catching
- Ways to identify your firm's unique strengths and differentiators
- Tools to sell the new ideas to your targets
- How to get started

## **Growing Your Book of Business**

#### **Learning Objectives:**

- Increase your revenue by 25 percent or more.

- Generate greater client satisfaction.
- Create your personal brand.
- Understand how to deal with challenging situations and people with ease.

## **TRAINING OUTLINE**

### **Session 1: Growing Your Book of Business**

- Identifying your brand
  - Exercise on how you are perceived
  - Are you more of a hunter or a farmer?
- Address various tips to increase efficiency in all types of personal and professional communication
  - Reading material and discussion of Four Agreements
  - Looking at areas on your team where you contribute and where you are stopped from contributing
  - Creating an empowering context in all communication
- Look at the top 10 ways to yourself indispensable to your clients
- Pre-screening questions to make sure the potential client is worth your time; learning when it is worth it to lose the business
- What to do when you get stumped
  - Role-playing challenging situations with clients
- How to close new business
- Being someone who people want to work with and refer people to
  - What is your “refer ability” factor?
- How to cold-call clients on LinkedIn and other resources
  - Scripts and conversations for success
- Learning to be a consultant to your clients
  - The tricks you need to know to be “client-oriented”
- Increasing your book of business
  - Daily declaration and statement of intent
  - Mentally preparing for success and intention setting

### **Training Format**

- 3.5-hour workshop
- Each training would include 2.5 hours of training, as well as 1 hour for a workshop and for questions

## **Cross-Selling for Lawyers**

At Robins Kaplan, you do important, meaningful work for large companies that have a wide range of significant legal needs. Your clients trust you to have their best interest at heart, and your lawyers are dedicated to their success, yet there is much litigation and transactional work that they send to other, less-qualified firms.

Although cross-selling is an important marketing effort, it is one that challenges *most* professional-services firms. This entertaining presentation will identify the internal obstacles inside law firms, and show a straightforward path to increased cross-selling success.

Attendees will learn:

- The typical objections to cross-selling — and what they *really* mean
- How to overcome the barriers to cross-selling
- How to identify a good cross-selling prospect
- What is the most-effective cross-selling mindset for litigators?
- How to use Robins Kiplans' Industry teams to simplify cross selling
- A simple, effective methodology to increase cross selling within Robins Kaplan

## Market and Generate Business

Not long ago, Associates who wanted to make partner simply had to do good work and lots of it, then wait 5-7 years. Today, Associates must create a personal network and begin building a book of business.

But do they have the skills necessary to do that? Do the training and development opportunities available align with the firm's marketing strategy and the Associate's own plan? Through objective market research and real-life examples, attendees will understand client and firm leadership expectations for client service and development by Associates.

You will also learn how firms are guiding Associates to create "individual marketing plans," and how to collaborate with Marketing to align training / development with associate marketing to maximize the firm's ROI and increase associate retention.

- Learn the expectations of clients and firm leadership for Associate client service and development
- Understand best practices used by Associates to begin building a client-centric practice
- Understand the elements of an effective individual marketing plan and discuss how they can be supported by skill-building training and activities
- Review a suggested year-by-year marketing checklist for associates, and understand how new technologies can aid the marketing and practice development efforts by Associates
- Discuss examples of how Training and Development can work with Marketing to support associates in their marketing efforts

### **THERE'S A ROLE FOR EVERYONE IN MARKETING**

#### I. INTRODUCTORY COMMENTS

- A. Goals
- B. Roles, Responsibilities and Expectations
- C. Benefits of a Marketing/Business Development Plan

## II. REVIEW OF ACTIVITIES

- A. Personal Branding
- B. Niches
- C. Thought Leadership/Organizational Activities
- D. Client Service/Existing Client Expansion
- E. Business Development: Referral Sources and Prospects

## III. WRAP UP

- A. Individual Reports
- B. Holding Each Other Accountable

11:30 ADJOURN

## Performance Driven Selling

Engineered Success: Our PERFORMANCE DRIVEN SELLING™ Series provides a strategic and tactical approach to professional development and sustainment success for those in business development, account management, and front-line selling positions of organizations. This is more than a mere sales training consideration, what we offer is the turn-key 360-degree of talent development for sales professionals and their leadership, to create a culture and climate of excellence.

Quality professional development must be built around substantial (1) Quantitative Data, (2) Psychological Profiles and proven (3) Behavioral Models that have been vetted to calibrate for immediate and lasting in the field selling success and the managerial-leadership effectiveness by sales managers of the selling force!

Each of our PERFORMANCE DRIVEN SELLING™ Series professional development programs are detailed below in an ideal delivery situation and each can be modified to meet your needs (KEYNOTE/TRAINING/ON-LINE LEARNING/COACHING):

### 1. PERFORMANCE DRIVEN SELLING BOOTCAMP/1.0

Our premier and base-line program, understanding and applying the fundamentals of selling effectiveness. The target audience is everyone connected to the selling organizations team, whether that is from the inside or outside business account development/selling professionals position, to include managerial-leadership and support personnel; This is ideally a two-day session with day-one focused on strategic and day-two on tactical aspects of selling and marketing as a sales professional; This is highly client specific with more than three-decades of specific best practice action plans and measurable KPIs for trajectory improvement and success; Participants in an interactive engagement will explore the psychology of selling, how and why customers come to you or leave, ways to engage prospects, customers, advocates and individuals that may be sideways with you.

We explore the six-levels of the selling pipeline/funnel model and how it makes and breaks your over-all effectiveness, from market exposure to quality and quantity of lead flow, to determining the math for your market and where the sales are, will be and how to manage your daily book-of-business for meaningful ROI. Specific strategies and tactics for each level are discussed for action plan consideration. Multiple conversation models will be presented and discussed in dealing with objections, no, hesitancy and generating leads from your customers for your next sale.

The art of controlled conversational consultative selling is taught with a simple, yet powerful Stacking-and-Linking conversational model that empowers individuals to quickly assess the need level of the other person as a suspect, prospect, applicant, COI or dead-end.

The analytics of selling success reveals that there SIX ANALYTICS that everything that you do revolve around, we will detail each and what it means to you in your business development process.

Exclusive exposure to our LeadGenerator™ system unlocks and unblocks sales professionals minds to endless quality lead flow that is your secret sauce to long term wins, and exposure to our exclusive ProductivityTracker™ a benchmark of best practices from super achievers in selling; Participants leave this session with more the fifty immediate and sustained KPIs for achieving and exceeding sales missions, including the revolutionary Quadrant Manager™ daily time management tool, that can increase daily sales effectiveness by as much as 12X; Unlike most all other professional development selling programs, this deliverable also provides post-session weekly professional development touch-points, virtual on-line learning platform of skill development self-study, CD/DVD and books ... A detailed stand-alone information program over-view of each days learning modules is available upon request.

2. PERFORMANCE DRIVEN SELLING BOOTCAMP/INTENSIVE/2.0 The target audience is the new to the profession of selling individual and veterans that have fallen into a selling slump can be addressed; In this session we take the PERFRMANCE DRIVEN SELLING BOOTCAMP-I session and place it on steroids for intensive one-on-one application for your team. This is ideally a two-day session with day-one focused on fundamentals and elementary aspects to strategic and day-two on fundamentals and elementary aspects tactical aspects of selling; This session involves Role Playing and situational one-on-one practice management development with participants and gets into the psychology of selling process and closing ratios; This is highly client specific with more than three-decades of best practice action plans;

Unlike most all other professional development selling programs, this deliverable also provides post-session weekly professional development touch-points, virtual on-line learning platform of skill development self-study, CD/DVD and books ... A detailed stand-alone information program over-view of each days learning modules is available upon request.

3. PERFORMANCE DRIVEN SELLING BOOTCAMP/Annual Sales Business Planning & Key Relationship Building Strategies/3.0. The target audience is everyone connected to the selling organizations team, whether that is from the inside or outside business account development/selling professionals position, especially to include everyone in sales management/leadership roles; 90-percent of selling professionals lack a written executable annual sales pan, and every failed or lost selling success can be directly tracked back to a failed plan. This is ideally a three-day session with day-one focused on the design and implementation of a strategic Annual Sales Business Plan/SBP, we explore the math for your real marketplace and all the ways you presently reach and engage the market. Day-two



focuses in one building actual annual SBP™ for Quarterly, monthly, weekly, daily execution, monitoring, management and execution success. The KPIs identified from this working SBP Template, will detail where your market opportunities and challenges will be every month for the coming year, and reveal what resources you will need throughout the year to achieve success. Day-three final wrap up of SBPs, we calendarize your game plan for execution and benchmark it against your CRM system or Outlook systems you use to ensure execution. Then we wrap this around the business Relationship Building Cube™ for the successful implementation and ROI of SBPs; This is highly client specific with more than three-decades of specific best practice action plans; Unlike most all other professional development selling programs, this deliverable also provides post-session weekly professional development touch-points, virtual on-line learning platform of skill development self-study, CD/DVD and books ... A detailed stand-alone information program over-view of each days learning modules is available upon request.

4. PERFORMANCE DRIVEN SELLING/4.0 Sales Management Success - Performance Execution of Managing, Leading & Building a Successful Sales Team by Developing Your Leadership Pipeline for Achieving Sales Team Excellence! There is just nothing like this available in the marketplace today, benchmarked off our decades of work with the best-of-the-best Fortune 100 sales forces and sales managers, to the most innovative entrepreneurial cutting-edge business across the globe!

The analytics of selling success reveals that there SIX ANALYTICS that everything that your sales professionals do, revolve around these factors. We will detail each and what it means to you as the sales leader in your business development process. From a managerial-leadership perspective, research of every successful organizations reveals, that there are FIVE ANALYTICS that the leadership team must fixate on daily and ensure everything that you do is benchmarked off of for ROI.

Our premier sales managerial-leadership program tailored to anyone in the managerial-leadership roles of the selling team/organization; Participants in this session use as field application resources two of our dedicated college management text books, the MANAGERIAL-LEADERSHIP BIBLE: Second Edition focused upon leading sales professionals and the second, THE SALES TRAINING HANDBOOK: 52-Weekly Engagement Plans; This is ideally a two-day session with day-one focused on fundamentals and elementary aspects to strategic selling organizations and day-two on fundamentals and elementary aspects tactical in nature to managing, guiding, growing, motivating, coaching and tracking selling professionals; The coaching and tracking analytics tools presented in this session have an immediate ROI on human capital development, the talent management lifecycle and strong professional selling individuals; Whether a veteran or new to sales management, this program benchmarks off of two decades of work with the best sells organizations in the World and details the fundamental factors to be traced daily and weekly for proven ROI of a selling team; This is highly client specific with more than three-decades of best practice action plans; This program is always in a state of real-time application based off of 20+ years of psychological in the field analysis of super achieving selling organizations, managerial-leaders and front-line selling professionals, that provides the behavioral analytics of what to actually track for understanding to market management to lead flow to contracts fulfilled, and more KPIs (such as how deploying Rule 1-52-X™ every Monday calibrates daily effectiveness for that week and how reviewing the 5@5 Rule™ on Friday ensures focus to client development and increased sales!), to a fully functioning peak performing selling team; Unlike most all other professional development selling programs, this deliverable also provides post-session weekly professional development touch-points, virtual on-line

learning platform of skill development self-study, CD/DVD and books ... A detailed stand-alone information program over-view of each days learning modules is available upon request

## Aligning Professional Development with Associate Marketing

Not long ago, Associates who wanted to make partner simply had to do good work and lots of it, then wait 5-7 years. Today, Associates must create a personal network and begin building a book of business. But do they have the skills necessary to do that? Do the training and development opportunities available align with the firm's marketing strategy and the Associate's own plan? Through objective market research and real-life examples, attendees will understand client and firm leadership expectations for client service and development by Associates. You will also learn how firms are guiding Associates to create "individual marketing plans," and how to collaborate with Marketing to align training / development with associate marketing to maximize the firm's ROI and increase associate retention.

### **Learning Objectives:**

- Learn the expectations of clients and firm leadership for Associate client service and development
- Understand best practices used by Associates to begin building a client-centric practice
- Understand the elements of an effective individual marketing plan and discuss how they can be supported by skill-building training and activities
- Review a suggested year-by-year marketing checklist for associates, and understand how new technologies can aid the marketing and practice development efforts by Associates
- Discuss examples of how Training and Development can work with Marketing to support associates in their marketing efforts

## Marketing Your Message

Gifts and giveaways are a great way to thank clients and market your firm. Used correctly, they can be an effective tool to convey your firm's branding and marketing messages.

But what IS your firm's message? How do you figure it out? And how can you use giveaways to support it? Are pricey entertainment and sports tickets necessary to impress your clients, or is there a better way? What is the ROI of gift-giving and how do you analyze the costs vs. benefits? The speaker will discuss trends, strategy and brand -- and hand out free gift samples to the audience.

Participants will also analyze the cost of gift-giving compared to the number of clients on the average firm mailing list and consider the role of charitable contributions as gifts.

Attendees are encouraged to bring a sample(s) of their firms' tchotchkes to this session for a big post-program SWAP. After attending, participants should be able to:

- Identify your firm's marketing message and how to use gifts to support it
- Analyze the cost vs. benefit and ROI of gifts

- Identify alternative ways to thank clients for their business and promote firms' messages

## Market Domination

NOW is the best opportunity we will see in our lifetimes to gain significant market share, to dominate our markets, and drive new revenue. All the studies show it, all the historic data prove it -- and few law firms are doing anything about it. In fact, most are going in the opposite direction. It's crazy.

Why? The lawyers don't understand that it's possible, or how to do it, and the marketers don't know how to educate them. This presentation will show what needs to be done to educate your lawyers and attain market leadership AND provide a basic PPT presentation in-house marketers can use to pitch it to their lawyers.

### 1) Strategic Marketing Differentiation

It all flows from the message. What's your unique strategy? How will you stand out from the crowd? Your website is your 24/7 face to the world, your most-important marketing tool but too many firms proclaim the same basic messages - Quality, Results, Excellence, or Service. These limp platitudes are then illustrated by the obvious clichés -- globes, columns, gavels, skylines, and "smiling lawyers."

To succeed in today's tough economy, you must do better. In one fun, fast-paced and visually stunning hour, attendees will learn how to develop their own unique strategy, blasting through dozens of differentiated messages and real-life examples of the best (and worst) law firm ads and websites, including a detailed case study. You will leave energized, educated and entertained, with a better understanding of how to differentiate your firm or practice. This program is appropriate for marketing-oriented lawyers too. A perfect program for senior administrators and lawyers.

Using one detailed case study and dozens of additional examples, this program will teach attendees at all levels:

- Why strategy is vital to the success of their marketing efforts,
- What the primary differentiation strategies are for law firms
- How to identify their own unique message
- How to sell it to their lawyers
- How to execute on it, including turning the message into a website

### 2) Focused Marketing

Listen to one of the legal profession's most "educational, effective and entertaining" speakers discuss how to build a tightly focused, wildly powerful effective practice or industry group.

Often called by Managing and Marketing Partners "the best marketing program I've ever seen," this presentation just might open your firm's eyes to a more efficient, more successful, and more fun approach to its marketing. Bring your Marketing Partner or Committee to this one.

In one informative, visually stunning, and fast-paced hour, attendees will blast through 100 slides and dozens of real-life examples of powerful strategies you can start using immediately.

Attendees will learn:

- The number one thing clients are buying today, and how to offer it to them
- The Top 10 differentiators lawyers use, and how to select the right one for you
- How to use LinkedIn and social media more effectively
- How to identify and dominate an industry
- Ways to identify your unique strengths and differentiators
- How to get started

### 3) Integrated Marketing

In this tough economy, it's not a question of which marketing tool works best. Success isn't dependent solely upon the eye-catching design of your website or advertising, or whether you choose blogs, billboards, brochures, or branding.

The secret of success today is knowing how to blend them all together to achieve specific, measurable revenue goals.

This fun, and fast-paced session will walk you through a simple, clear methodology that ensures the successful creation and implementation of powerful marketing campaigns, business-development strategies, and branding initiatives.

Through this rigorous approach, digital/online and social-marketing strategies are tightly integrated with traditional marketing and PR to achieve specific business objectives.

- The top ten (or 20) differentiators firms use, and how to select the right one and tailor it specifically for your unique firm
- Ways to identify your firm's unique strengths and position
- How to identify and dominate a region, practice, or industry, including the most-effective tools to use
- Strategies to make your web site visually stunning
- Can you bid on your competitor's name in Google AdWords?
- The number one thing clients are buying today, and how to offer it to them.
- What is the ONE question you must ask to determine whether your communication is subject to the ethics rules?

### 4) Niche Marketing

Unsure of how to jump-start your lawyers' marketing efforts? Are there some lawyers in your firm who aren't generating results quite quickly enough? For lawyers and legal administrators committed to business development, this simple, practical, fun and results-oriented program will demonstrate exactly how to do it most effectively.

Scattershot marketing efforts are inefficient and frustrating – few lawyers are skilled enough to succeed with so broad an approach. Pulled in too many different directions, lawyers often fail and simply give up.

Developing the reputation as an industry expert is among the fastest routes to client-development success, and ANYONE can do it.

## Key Topics

### Introduction

- What are the traditional rainmaking styles?
- How can you develop significant business within your own personal style?

### Networking

- How to develop relationships?
- How many contacts does it take to bring in a client?
- Studies and surveys

### Messages

- Comparison of law firm brochures and Web sites
- What messages are we sending?
- Examples

### Multi-faceted marketing campaigns

- An overview of today's marketing tools
- Fitting the pieces together
- Examples

### Positioning

- The importance of being first
- The futility of traditional, inch-deep/mile-wide marketing
- Narrowing a practice to look different
- Geography, practice, style, industry
- Envelope-pushing examples

### Organizations

- The value of trade associations and industry groups
- Getting active, gaining visibility
- Examples

## 5) Niche Marketing

Looking to jump-start your firm's marketing efforts? Want to generate results more quickly? A little focus leads to significant results, and in one informative and fast-paced session, you'll learn how to build a tightly focused and effective practice or industry group. One of the legal profession's most innovative and highly honored marketers, Ross Fishman will show slides and dozens of real-life examples of powerful strategies you can use immediately to advance your firm's or practice's marketing efforts.

Often called by Managing and Marketing Partners "*the best marketing program I've ever seen*," this presentation just might persuade you to try a more efficient and more *fun* approach to your marketing

Attendees will learn:

- The *number one* thing clients are buying today, and how to offer it to them
- Why having fewer targets generates more revenue
- How to identify what makes you different from other lawyers
- How to identify and dominate an industry

## Business Development for Busy, Young Attorneys

More than ever before, young lawyers understand the importance of marketing and business development to their long-term career development. Most want to do it. They're just not sure what to do or how to get started. They're not sure how much time to invest. They often have unrealistic expectations about the results they might achieve as a young attorney.

Over the past several years, we've had fantastic response to marketing sessions designed especially for junior partners and associate attorneys. These sessions run from two hours to a half-day and have been approved for CLE credit in many jurisdictions. The handout material includes all the tools necessary for a busy attorney to create an Individual Marketing Plan — a plan that's realistic, achievable, consistent with firm goals and appropriate for practice.

And young lawyers love it! They leave with practical ideas and guidance to become an effective rainmaker. For example, we focus on the importance of niching and specialization, and developing good habits that will pay off over time. [Click here](#) to see an article we wrote, titled "How to Build and Maintain a Marketing and Sales Culture at Your Firm."

### **Learning Objectives:**

- How clients find and select outside counsel
- Today's best practices in law firm marketing
- Practical tips for busy young attorneys
- How to develop your individual marketing plan
- The importance of sustainable, lifelong habits

- 9 a.m.            **Introductions, Goals and Objectives**  
Participants will provide self-introductions, including specific topics they want to cover during the session.
- 9:20 a.m.        **How Clients Find and Select Outside Counsel**  
An overview of recent studies regarding clients find and select outside counsel, with questions and answers along the way.
- 10 a.m.           **Today's Best Practices in Law Firm Marketing and Business Development**

A presentation about what law firms are doing to attract and maintain desired clients, focusing on the most effective strategies and tactics.

10:30 a.m.     **BREAK**

10:45 a.m.     **Best Strategies and Tactics for Smaller and Midsize Law Firms**

Next, we drill down on those strategies that are most effective for smaller and midsize law firms, including client feedback programs, industry practice groups, organizational involvement, and individual business development plans.

11:30 a.m.     **Practical Tips and Techniques for Busy Lawyers**

Recommendations on how to build effective business development habits into your busy work schedule. As with previous segments, the session is fast-paced and highly interactive.

Noon           **Your Individual Business Development Plan**

We conclude the workshop by presenting a template and supporting materials for participants to create a personal marketing plan. Importantly, it should be specific, measurable, realistic and achievable.

12:30 p.m.     **Adjournment**

## Digital Marketing and SEO

SEO and Social Media - What They Really Mean and How Your Firm Should Use Them

### **Summary:**

Both SEO (Search Engine Optimization) and Social Media are extremely important concepts but are often both confusing and misunderstood. In this session, Spencer will teach the core concepts of each in plain English. Even more importantly, we'll discuss why your firm should initiate or continue using one or both initiatives. Whether your goal is business development, marketing, or employee attraction and retention, you'll leave this session knowing how to better communicate in language understandable to attorneys, marketing and professional staff.

### **Learning Objectives:**

- Define "one version of the truth" when it comes to SEO and Social Media, so those at your firm can use terms and concepts congruent with your business objectives
- Identify opportunities to improve current SEO and Social Media initiatives with simple enhancements
- Discover which SEO and Social Media projects are worth pursuing, and which will yield the best results
- Understand how best to communicate ideas with marketing departments and/or marketing/PR business partners, to align with agreed-upon metrics of success

### 1) Strategic Driver for Online Marketing

Every firm has practices that offer real leadership opportunities. They're dynamic and well led, or in a growing market segment. In larger firms, an industry group or specialty area can be spread across a range of offices and practices, impeding cross-selling.

One top firm figured out a solution.

This presentation showcases the effective efforts of a large and small firm in targeting a practice and industry group for market dominance. Drinker Biddle sought growth in Health Care, although their lawyers were spread across 14 practices and 11 offices.

This initiative helped them work together and cross-sell, founded upon powerful stories, microsite, and team retreat.

Attendees will learn how to:

- Identify the best practice or industry group to target,
- Write a marketing plan to execute the plan,
- Persuade the firm's lawyers to work together,
- Use internet marketing tools to help execute the plan, and
- Sell this to the firm.

## 2) SEO and Social Media

Have you ever noticed that “Social Media Gurus” have too much time on their hands? Sure, you could spend all day tweeting, blogging and posting an endless stream of Facebook and LinkedIn updates. But lawyers billing by the hour don't have the time. It's neither practical nor realistic.

Candidly, most of this incessant activity and updating isn't necessary or effective anyway. Social media isn't the solution for all marketing challenges -- it's just one more tool that could be used strategically to advance your goals. What's important is to understand the basics, to stay current on what's out there, and know what you really need to know.

Lawyers should understand when social media is effective, and how to select the right tool, target, and tactic to get the biggest bang for your buck, baht, or balboa.

Attendees will learn:

- How to cut through the social media hype and learn what really works
- How to write for the Internet (including websites, blogs, etc.)
- How to edit their LinkedIn profiles for maximum SEO value
- Whether their firm/lawyers need to use Facebook and/or Twitter
- How to reuse and repurpose their existing content in dozens of locations across the Internet

## 3) Digital Marketing Trends

What's more important on your website, the marketing or the technology?

Finally, here's how all the pieces fit together. Online marketing is today's hottest topic, but few seem to know what it all means, or how to balance the many different components.



Can websites really persuade prospects to hire your firm or eliminate it from consideration? Do full-service firms need Facebook pages? Can your lawyers ethically receive LinkedIn “recommendations” or list “skills and expertise”?

Should full-service firms care whether they rank highly in Google searches? Can you legally bid on your competitors’ names on Google? In this fascinating and fast-paced presentation, Ross discusses these topics and more, from SEO and “content marketing” to cutting-edge eye-tracking research.

Built from actual law firm case studies worldwide and the latest b2c and b2b research, Ross will identify which components are necessary, and how to use the latest marketing tools and techniques. How can law firms use the multivariate testing technology developed for president Obama’s 2008 campaign to continuously improve your website and online marketing?

He will detail how to edit your online materials, including website biographies and practice descriptions, to increase the chance of getting found for your preferred Google searches.

## ROI from Marketing on the Internet

How does a firm get noticed for its most important people and work? How can a law firm’s content compete with the tens of millions of posts on social media today? Where is the best money invested for the greatest return? Where do your business development goals fit in — and how do they drive your strategy and result in new opportunities? This program will answer these questions and many more.

You’ll hear the results of Content Pilot’s recent study, *Global 50 Law Firm Websites: 10 Foundational Best Practices*, receive practical advice about content successes and website strategy/design, hear tips on search engine optimization (SEO), and review all-around best practices — all with the goal of winning your firm more profitable clients.

### **Learning Objectives:**

- Identify how B2B buyers of legal services evaluate law firms online, the two buying stages they go through and more.
- Break down how to write website and social media content that will turn the heads of human readers and search engine robots.
- Identify what the world’s largest law firms are doing online that’s working — and not.
- Discuss how to build your next website with business development in mind and how to plan the right strategy and budget.

## Law, Business Development and Technology

Everyone is suffering from “content discontent.” Law firm marketers and lawyers are scanning hundreds of articles, tweets and blog posts about content marketing but struggle to know how to shift to a new way of doing things in their law firms.

The answer? Start at the source — the clients, not the lawyers. Business development is exponentially more successful when lawyers understand how their clients buy legal services. How do they evaluate their firms? Where do they go to vet referrals from colleagues? What do they look for on law firm websites? Understanding this is critical before marketers invest in content and social media marketing, or a website redesign.

This program will help you understand how buyers buy and how you can better target your firm's marketing/business development content and investments to meet clients' requirements. Write smarter, more relevant practice/industry pages; write more compelling bios that truly distinguish your lawyers; and more. You will learn how you can make your most important content work harder — and walk away knowing the highest-opportunity online areas in which you can invest your marketing dollars.

# Operations Management

## Operations Excellence

Operational excellence means more than delivering quality legal services. The most successful law firms and legal departments are changing the way they deliver their legal services and the way they run their organizations.

This practical, hands-on workshop introduces you to an integrated approach to performance, profitability and innovation. Or, if you are in-house, to performance, productivity and innovation. Either way, you will learn where your organization sits on the PPI Maturity Model and how you can use Lean and process improvement as a foundation for key service delivery improvements.

We will tailor the workshop to meet the needs of your organization. The agenda can also be expanded to become a full-day activity.

### **Learning Objectives:**

- Understand operational excellence.
- Learn where they stand on the PPI Maturity Model.
- Learn how Lean can increase productivity, profitability and client service across the organization.
- Understand how integrating key initiatives in pricing, process, project management, legal tech, and more can drive improvements in operational excellence.

### **Who Should Attend?**

This workshop is suitable for attorneys in private practice and in-house, para-professionals and senior law firm and legal department managers. Everyone will leave the workshop with skills they can apply immediately to improve their own work and that of their organizations.

**Detailed Agenda** — approximately 3.5-hour workshop

### **What's Operational Excellence? (15 minutes)**

- What does operational excellence really mean?
- What's driving the move to operational excellence? A look at trends in the legal market.
- Interactive exercise: What's Your Business Case for Change?

### **The Performance, Profitability and Innovation Maturity Model (15 minutes)**

- Integrating your improvements: the PPI Maturity Model
- Breakout activity: Where Are You on the Maturity Model?

### **Building the Foundation for Operational Excellence (1 hour)**

- Using a framework for improvement: DMAIC
- Understanding value and waste in operational processes

- Breakout activity: The Eight Wastes
- Establishing your baseline and choosing your metrics

### **BREAK (15 minutes)**

#### **Improving the Process (30 minutes)**

- Using maps to visualize your process
- Setting up a mapping project
- What outcomes to expect: case studies on process improvement projects involving how attorneys practice, as well as projects targeting the business/administrative processes that support the practice of law.

#### **Bringing It All Together (30 minutes)**

- Moving along the maturity model from reacting to innovating
- Lean and process improvement as a foundation for innovation
- Breakout activity: Using Process Maps to Plan Your Innovations

### **Question and Answer Period (15 minutes)**

#### **1) Member and Business Partner Interaction and Engagement Building a Culture of Intentional Communication**

Let's be honest. With every interaction we undertake, whether conscious or not, we all have our agendas. Business partners have quotas to fill and bottom lines to improve. Members have the needs and demands of their respective firms, attorneys, staff, and partners to juggle as well as the new member and Business Partner goals of the Chapter. The point is not to ignore those agendas, but to mutually embrace that they exist and work together to see how those agendas can become overlapping goals. When we do this, we take our first step into the realm of intentional communication. Instead of shutting down or avoiding conversations because we don't need something right now, we open-up opportunities for building long-term relationships.

#### **Learning Objectives:**

- Learn do's and don'ts of BP/Member Engagement
- Learn how to Build Culture of intentional Communication
- Learn of proven methods of meeting the goals of Members/Chapters/BPs

#### **People Do Business with People Why Long-Term Relationship Building Pays Success Dividends**

Our current business environment is filled with so many technological tools that are intended to make our personal and professional lives easier. The tools we have created for ourselves, many times, take away from the most important asset that we have, PEOPLE. "What ever happened to Thank You?"

This session is focused on reminding all of us how important the building of positive relationships in our professional and personal lives that pay dividends of happiness and success. Creating a culture of true appreciation and the building of long-term relationships inside your firms, businesses and even chapters pay huge dividends. Play the long game!

**Learning Objectives:**

- Learn the importance of relationship power
- Learn how to create an environment of gratefulness
- Learn why a Sincere “Thank You” can change the world
- Learn how to establish culture of true appreciation

## Records Management

### 1) The Getting to Zero Strategy

Nothing is more important in today’s law firm environment than a firmwide, long-term strategic plan for records. Putting an effective offsite storage contract and process in place and records retention policy reduces risk, improves compliance and extends to substantial financial and operational efficiencies. Can your firm achieve this?

Rob Mattern, President of Mattern, will discuss how firms can cost-effectively eliminate offsite storage burdens over the next decade by identifying and obtaining key offsite storage contract terms and conditions.

**Learning Objectives:**

- Discuss successful strategies which address records retention, digitizing onsite records, and offsite records storage contracts.
- Discover how to overcome the landmines which most often derail these objectives: hidden terms and conditions in contracts, reluctance to destroy hard copy documents, and antiquated workflow.
- Determine current benchmarks for offsite records storage pricing.

### 2) Information Governance Over Paper & Electronic Records

Firms without a comprehensive, firm-wide set of processes and practices for their electronic and physical paper records will lose their competitive advantage and have the potential to expose clients to risk. When it comes to client data, the best strategy begins with strong information governance. What can your firm do to start?

Join Rob Mattern, President of Mattern, as he discusses the steps firms can implement right now to substantially improve governance over their records.

**Learning Objectives:**

- Discuss how to improve governance over their records by managing both electronic and physical records under a unified approach.
- Formulate key offsite storage contract terms and conditions that help reduce withdrawal fees and destroy records cost-effectively per retention schedules.
- Learn how to implement a workflow scanning solution where necessary.

## Advanced Legal Process/Project Management

### Lean in Law

Recent surveys on the state of the legal industry have all come to the same conclusion: in the years to come, the most successful attorneys will transform not just the way they deliver their legal services but the way they run their law firms and legal departments.

In this practical, hands-on workshop, you'll learn some of the key strategies of Lean and legal process improvement — strategies that can help you build a more efficient, productive, profitable and competitive practice. Or, if you are in-house, a more efficient, productive and effective practice.

We'll explore the Lean concepts of value and waste and show how to develop a set of improvement opportunities that you can start working on within your organization. We'll also teach you some easy ways to prioritize your improvement opportunities and give you a brief introduction to process mapping. You will leave the workshop with skills you can apply immediately and a set of issues that can serve as starting points for your improvement initiatives.

We will tailor the workshop to meet the needs of your organization. The agenda can also be expanded to become a full-day activity.

#### **Learning Objectives:**

- Some key concepts on Lean and legal process improvement
- How to use Lean's eight wastes to develop a set of improvement opportunities
- How to prioritize potential improvements
- The basics of process mapping
- How to use a process mapping project to identify wastes and improve service delivery

#### **Who Should Attend?**

This workshop is suitable for lawyers and other legal professionals in law firms and in legal departments. Senior law firm and legal department managers, attorneys in private practice and in-house, and para-professionals will leave the workshop with skills they can apply immediately to improve their own work and that of their organizations.

**Detailed Agenda** — approximately 3.5-hour workshop

#### **Finding Time: Introducing Lean and Process Improvement (30 minutes)**

- Icebreaker activity

- What's Lean and why should lawyers think about it?
- Who else is doing it? Case studies from law firms and legal departments across North America

### **Learning to See Your Work Differently (1 hour)**

- Establishing a framework for improvement
- Looking at your work from the client's perspective
- Interactive Exercise: Who's Your Client?
- Understanding value and waste
- Breakout activity: The Eight Wastes

### **BREAK (15 minutes)**

### **Putting the Tools to Work (30 minutes)**

- Getting to the root cause of waste in law
- Interactive Exercise: Analyzing Problems with One Little Word
- Introducing PICK Charts and Kano's Model — two easy-to-use tools and how you can use them
- Interactive Exercise: Kano's Coffee Shop — applying the tools

### **Using Maps to Visualize and Improve Your Work (45 minutes)**

- Selecting a process
- Setting up a mapping project
- Thinking about workflow, systems and technology
- Breakout activity: Working with Process Maps

### **Managing Change (15 minutes)**

### **Question and Answer Period (15 minutes)**

## **Process, Pricing and Project Management**

This is not a survey course. It's a full-day, intensive, skills-building workshop designed specifically for those who want to grow their business or save their business. In either case, it's for people who want to grow their profits.

We've taught thousands of lawyers and legal professionals. We've worked in law firms and legal departments across the continent. We know what works and what doesn't. We've selected strategies and tools that we know you will be able to apply, and that will equip you to begin designing effective legal process improvement and project management initiatives.

We will tailor the workshop to meet the needs of your organization.

### **Learning Objectives:**

- Learn how to integrate their process, pricing and project management initiatives.

- Acquire practical skills they can use the moment they walk out the door.
- Gain the knowledge to frame a conversation internally that will allow them to better structure their own improvement initiatives.

### Who Should Attend?

- Lawyers who want to reduce write-downs and write-offs, deliver the services their clients need more effectively and compete more successfully in today's challenging legal market
- Business/administrative personnel who want to support practitioners and create a central hub of Lean and practice management expertise
- In-house counsel who struggle to meet the expectations of their internal clients, and the growing demands on their time and resources

### Course Structure

- 6 hours of learning time and additional networking time during breaks and lunch
- Morning dedicated to process improvement, with activities designed around legal or business/administrative processes (depending on the audience)
- Afternoon dedicated to project management and pricing, building on and integrating with the skills developed in the morning session
- Every section includes hands-on activities, giving participants the opportunity to work with others and practice their skills
- Q&A session at the end for participants to ask for input/advice on specific initiatives

### DETAILED AGENDA — Full-day workshop (all times are approximate)

9 a.m.–12:15 p.m.

#### **Introduction (40 minutes)**

1. Introductions/objectives
2. Positioning yourself for success in today's legal market
  - a. Where is the market today, and where is it going?
  - b. How can firms position themselves for the future?
3. Setting the stage for innovation
  - a. What is process improvement?
  - b. What is project management?
4. Moving up on the Legal Service Delivery Maturity Model
  - a. *Activity:* Where are you?
5. Adding value
  - a. What is the Client-Value Equation: benefit/cost/customer service?

#### **Seven Steps to Success, Part 1**

1. Identify a target process (30 minutes)
  - a. Selecting your starting point
  - b. Determining your selection criteria
  - c. Introducing the sample process
  - d. Understanding the client perspective



- i. *Activity:* Who are your clients and what do they want?
- e. Completing a project charter: building your business case and problem statement
  - i. Case studies
  - ii. *Activity:* What's the business case?

**BREAK (15 minutes)**

- 2. Map it (40 minutes)
  - a. Overview of value stream mapping
  - b. Overview of process mapping
    - i. *Activity:* Mapping the sample process
- 3. Optimize it (60 minutes)
  - a. Key Lean tools
    - i. DMAIC
    - ii. *Activity:* Eight wastes
    - iii. *Activity:* 5-why
    - iv. *Activity:* Pick & Kano
  - b. Applying the tools to the sample process
    - i. *Activity:* Developing the optimized process

12:15–1:15 p.m.

**LUNCH**

1:15–4:15 p.m.

**Seven Steps to Success, Part 2**

- 4. Scope it (45 minutes)
  - a. Scoping your matter for pricing and project management
  - b. Identifying resources
    - i. *Activity:* Who's doing the work?
  - c. Setting clear assumptions
    - i. Consequences of mis-budgeting
    - ii. *Activity:* What's in and what's out?
  - d. Work breakdowns
    - i. *Activity:* Breaking down the work using your maps
- 5. Cost it (45 minutes)
  - a. Understanding revenue, realization and profitability
  - b. Reviewing typical pricing approaches
  - c. Costing a matter
    - i. What's in and what's out of the cost
    - ii. The importance of keeping
  - d. Using maps and works breakdowns to price a matter or process

**BREAK (15 minutes)**

- 6. Communicate it (15 minutes)
  - a. Communicating with clients
  - b. Communicating with members of your team
  - c. After-action reviews

7. Monitor it (20 minutes)
  - a. Developing your tracking metrics
    - i. Hours/tasks
  - b. Managing to your scope
    - i. Ensuring your team understands the scope
    - ii. Recognizing, capturing and communicating scope changes
  - c. Actively managing scope changes
  - d. Selecting your monitoring tools
    - i. What's the minimum that you need?

**Wrap-up (30 minutes)**

Q&A session where participants can get advice on their own internal initiatives

## Outsourcing

### 1) Outsourcing: Can it Future-Proof Your Firm?

The legal market for services is evolving into a supply chain of multiple providers. Fierce competition from the Big 4 continues to emerge as PwC recently announced its intentions to open a US-based law firm in Washington, D.C. Clients are bringing lower-end, repeatable work in-house, investigating alternative legal service providers, hiring first year associates, and inserting budgets on matters with outside counsel.

Anything not “unique” to a firm’s delivery of legal services ought to be outsourced. From traditional service areas to litigation support services to legal process outsourcing (LPO) and more, outsourcing can be a strategy that not only reduces costs and infuses firms with higher value efficiency and expertise, but it also improves the recovery of those costs.

What is the state of the union on outsourcing? How far can or should firms take this strategy? What do clients want/what is the client perspective? Can outsourcing future proof your firm? Join President of Rob Mattern, President of Mattern, to find the answers to these pressing questions.

**Learning Objectives:**

- Discover law firms current take on outsourcing as a strategic option for back and middle office services.
- Determine how to take traditional areas of outsourcing (reprographics, mail, etc.) and make them more cost-effective and efficient with added benefits to the firm.
- Discuss new areas – document processing, records, litigation support, and administrative resources should be reviewed and considered for outsourcing

### 2) Maximizing Your Service Providers: Contracts for Savings and Efficiencies

2018 was the year of law firm mergers and acquisitions, with numbers exceeding historical averages with a total of 72 mergers, according to *The American Lawyer*. The trend toward mergers and

acquisitions is sought to leverage size to gain market share. In addition to economies of scale, firms can gain tremendous efficiencies by centralizing functions and consolidating their services contracts. However, it's not only for firms experiencing an acquisition; centralizing services post-merger are vital for the firm to optimize efficiency, leverage size in the services marketplace, and streamline operations.

Do you have multiple contracts with the same or different vendors? Do you have a firm-wide strategy for offsite records storage, office supplies or equipment? In this session, we'll dive into details about contract consolidation, how to approach this strategy, and key terms that are needed.

**Learning Objectives:**

- Review the pros and cons of consolidating contracts
- Identify how to approach the strategy of this process and how to structure the request for proposal (RFP)
- List the critical contract terms, performance standards and score-carding that will make the process work for your firm.

### 3) How to Structure Your Office Supplies Contract to Maximize Firmwide Savings

Paper, printer cartridges, pens, folders, staples—little things that add up quickly over a law firm to become a sizeable expense

It is time to stop placing firmwide material costs into different silos. Even small things such as drinking cups can be defined as office supplies and by looking at materials this way you can pool your spending to maximize savings across your firm.

The next time you are looking at ways to reduce your back-office costs, look no further than the coffee cup you are drinking out of and the paper towels you use to dry your hands. Chances are, they are on different contracts with different vendors. But should they be? Join Rob Mattern, President of Mattern, to find out how your firm can decrease their supply spend.

**Learning Objectives:**

- Learn about several key costs and contractual term benchmarks of peers of similar firm size
- Discover the top areas of focus you need to review in your firm in order to successfully negotiate favorable terms
- Determine how to approach the strategy of this process and how to structure the request for proposal (RFP)

### Thinking Differently About Resource Allocation

In this workshop, you'll learn why innovation and change are difficult in our profession, and how a few simple changes can improve the success of your improvement initiatives. You'll also learn a new way of thinking about how you use the talent of your team.

In all our process improvement projects, our clients get significant benefits in productivity and profitability by reallocating work to the most appropriate resources. This practical, hands-on, half-day workshop will teach you how to think differently about change. We'll explore the Lean concepts of value and waste, using the efficient allocation of your resources as an example. You will never look at your work in the same way again.

We will tailor the workshop to meet the needs of your organization. The agenda can also be expanded to become a full-day activity.

### **Learning Objectives:**

- Learn why change is hard in our industry, and how one key shift in mindset can improve the chances of success.
- Learn to see their work through the Lean lens of value and waste.
- Learn how process maps can help find instances of unused talent (and more!).
- Practice using process maps to reallocate resources.
- Learn how to select a process and set up a mapping project.

This workshop is suitable for lawyers and other legal professionals in law firms and legal departments. Senior law firm and legal department managers, attorneys in private practice and in-house, and para-professionals will leave the workshop with skills they can apply immediately to improve their own work and that of their organizations.

30 minutes	<b>What's Innovation ... and Why Is It So Hard?</b> <ol style="list-style-type: none"><li>1. Icebreaker activity</li><li>2. What's innovation?</li><li>3. Why are innovation and change particularly hard in the legal industry?</li><li>4. How can you think differently to improve your chances of success?</li></ol>
60 minutes	<b>Learning to See Your Work Differently</b> <ol style="list-style-type: none"><li>1. Looking at your work from the client's perspective</li><li>2. Understanding value and waste</li><li>3. <i>Breakout activity:</i> The Eight Wastes</li></ol>
15 minutes	<b>BREAK</b>
60 minutes	<b>Spotlight on the Waste of Non-Utilized Talent</b> <ol style="list-style-type: none"><li>1. A deep dive into the benefits of getting the right person doing the right job at the right time</li><li>2. Case studies: A review of projects where reallocation led to significant benefits</li><li>3. How process maps help reallocate talent</li><li>4. <i>Breakout activity:</i> Using actual maps to identify non-utilized talent and reallocate resources</li></ol>
30 minutes	<b>Process Mapping to Find and Resolve Talent Wastes</b> <ol style="list-style-type: none"><li>1. Selecting a process</li></ol>

2. Setting up a mapping project
3. What outcomes to expect

15 minutes

### **Question-and-Answer Period**

#### **1) Business Continuity**

It could be a burst pipe, a fire in a neighboring suite, a workplace violence incident or a weeklong power outage....it doesn't have to be a natural disaster that could close your firm or affect the firm's reputation. Does your firm's current business continuity plan address all the essential components necessary to seamlessly continue providing services to clients/customers if such a situation were to occur? If not, then this session is for you. Items such as IT recovery and cyber security protection, alternate work space, risk management and compliance, crisis communication systems and comprehensive written business continuity plans will be discussed in an interactive session.

#### **2) Business Continuity**

These days, most businesses have some type of written business continuity plan in place within their companies and offices to help deal with unexpected disasters or emergencies. But have those plans been routinely tested or do they just sit on a shelf gathering dust? Do you have all the necessary and required resources in place in your firm to test your plans? Your plans could be outdated with no real value in a true emergency. This session will look at the state of readiness of your business continuity plan, analyze how to ensure compliance with client, regulatory or industry standards and requirements and provide best practices for firms surrounding the testing of emergency preparedness and business continuity plans.

#### **3) Writing Business Continuity Plan**

We all know that a comprehensive written Business Continuity plan is an essential part of your firm's Business Continuity program. Is your current plan gathering dust on a shelf? Are you struggling to put together a written plan that not only prepares your firm in the event of a disaster, but also meets client compliance and audit requirements and RFP guidelines, regulatory requirements and industry standards that have changed the playing field for Business Continuity in the legal world? If so, then this session is for you. This session provides valuable information to any size law firm where you will work through a check list of key components that should be a part of every written Business Continuity plan. That checklist can then be used to assess and revise your law firm's current plan.

#### **4) Disaster Preparedness**

Las Vegas, Thousand Oaks, Napa, Pittsburgh, Puerto Rico, Houston, Wilmington, Panama City, Parkland, Florida: the sites of horrific traumatic events in the last year. We all see the news every day with graphic images of people who are survivors of wild fires, flooding, hurricanes, terrorist attacks or school children dealing with the aftermath of an active shooter at a school. But how often do we take the time to really think about what happens to us as individuals when we experience a traumatic event? Behavioral response to stressful incidents or crises and what is actually happening in the brain can be broken down

into psychological stages that help to explain why individuals react in certain ways as they experience trauma. This presentation will help those involved in crisis management gain a better understanding of the “human factor” in a crisis and learn how to use this knowledge to better prepare your firm’s crisis management team for any crisis situation or disaster they might encounter.

## Office Space Utilization

### 1) Managing the Need for Change

Workplace needs for law firms used to be relatively stable, requiring very little adjustments. Now with so many factors influencing how the office space is utilized, it can easily become very time consuming and costly to address these ongoing issues.

This interactive discussion will illustrate some of the more pressing changes that are occurring or are anticipated to occur. In addition to this initial list of changes, issues confronting the participants will be solicited and addressed if time permits. Understanding the real issue will help the attendees prioritize the adjustment and implement any changes in the most cost effective and least disruptive way.

Upon completion, the attendees should have a strong sense of the key issues impacting their space, how to address them now or how to position the firm to do it in the future with minimal impact to the firm.

#### **Learning Objectives:**

- Understand the drivers for change.
- Identify the key changes occurring.
- Review possible changes coming soon.
- Learn from other attendees’ issues confronting their firms
- Learn of ways to manage addressing these issues.
- Understand how to utilize cost benefit analysis to prioritize the efforts.

#### **Who Should Attend?**

This workshop is suitable for any individual involved in a law firm’s real estate needs: managing partners, administrators, real estate attorneys, facilities manager, and members of a firm’s space committee. All should leave the session with an understanding of the major changes and position the firm to address them.

#### **Detailed Agenda** — approximately 1.5-hour

##### **What changes are Occurring? (10 minutes)**

- Staffing ratios.
- Technological evolutions.
- Functionality of furnishings.
- Work styles.

##### **Real vs. Perceived Needs for Change (10 minutes)**

- Understanding the underlying issues of the change.
- Identifying partial solutions that would address the Change.

### **Major Issues that are Changing or will Soon be Subject to Change (30 Minutes)**

- Personnel utilization.
- Client interaction.
- Impact of Telecommuting.
- Document Storage.
- Furniture ergonomics.

### **DISCUSSION OF OTHER ISSUES WITH ATTENDEES (10 minutes)**

- Changes confronting attendees.
- Identifying other issues from attendees.

### **How to Improve the Process (20 minutes)**

- Clearly identifying the issue and its needs.
- Analyzing the causes of the issue.
- Identify possible solutions from partial to complete.
- Determine the cost, timing and disruption of all solutions.
- Utilizing Cost Benefit Analysis to select solutions helping prioritize the timing.
- Present comprehensive plan to the firm for approval.
- Begin implementation of approved plan.

### **The Next Steps (10 minutes)**

- Investigate changes, real or unanticipated, potentially confronting the firm.
- Analyze changes and present to firm.
- Create potential solutions to selected changes.

### **Question and Answer Period (10 minutes)**

## **2) Workplace Planning to Address Generational Differences Within your Firm**

There are three major generations with very different characteristics and workstyle in most law firms: Millennials, Gen X, and Baby Boomers. Most attention has been on the Millennials and Boomers due to their equally larger sizes, which has left the Gen X less understood. Yet they are one leading or assuming leadership roles in most firms. Additional law firms without mandatory retirements are dealing the Traditionalist generation, those born before 1945, more than most typical workplaces. Not only is there a fourth generation in many law firms, but current law school graduates are the start of a fifth generation, Gen Z. Only slightly smaller than the Millennials, some projections have them at 20% of the work force by 2020.

This interactive discussion will illustrate some of the more pressing issues that are occurring or are anticipated to occur. In addition to this initial list of changes, issues confronting the participants will be solicited and addressed if time permits. Understanding the real issue will help the attendees prioritize the adjustment and implement any changes in the most cost effective and least disruptive way. Upon completion, the attendees should have a strong sense of the key generational issues impacting their space, how to address them now or how to position the firm to do it in the future with minimal impact to the firm.

**Learning Objectives:**

- Why do generational differences matter?
- What are the different generations.
- Defining the major characteristics of the generations.
- How the workstyles of each generation vary.
- Identifying solutions to minimize the differences.
- Develop methods to implement the changes with the least disruption.

**Who Should Attend?**

This workshop is suitable for any individual involved in a law firm's real estate needs: managing partners, administrators, real estate attorneys, facilities manager, and members of a firm's space committee. All should leave the session with an understanding of the major different generations and how it impacts space utilization.

**Detailed Agenda** — approximately 1.5-hour**What are the key issues of each Generation? (10 minutes)**

- Basic Characteristics.
- Impact of Historical Events.
- Drivers: family, money, education.
- Technological influences.

**Impact on workstyles (10 minutes)**

- Communications.
- Technology.

**Major Issues of each Generation. (30 Minutes)**

- Traditionalists.
- Baby Boomers.
- Gen X.
- Millennials.
- Gen Z.

**DISCUSSION OF OTHER ISSUES WITH ATTENDEES (10 minutes)**

- Issues confronting attendees.
- Identifying other issues from attendees.

**How the Generations Impact the Workplace Environment (20 minutes)**

- Clearly identifying the generations of your staff.
- Understand their drivers and traits.
- Identify possible solutions to alleviate potential conflicts.
- Determine the cost, timing and disruption of all solutions.
- Utilizing Cost Benefit Analysis to select solutions helping prioritize the timing.
- Present comprehensive plan to the firm for approval.
- Begin implementation of approved plan.

**The Next Steps (10 minutes)**



- Investigate the generations within your firm.
- Analyze any characteristics that cause friction within the firm.
- Create potential solutions to address the issues.

**Question and Answer Period (10 minutes)**

**Client Services**

**1) Client Interview Training**

- I. Introductory Issues
  - Goals and Objectives of the Interviews
  - Summary of the Process
- ii. Interview Due Diligence: Preparing For The Client Interview
  - Inviting Clients to Participate
  - Doing Your Due Diligence
- iii. Interview Process: Conducting Effective Interviews
  - Opening the Meeting
  - Asking Questions and Engaging in a Dialogue
  - Recording Responses
  - Responding to Issues
  - Closing the Interview
- iv. Role Play Exercise
  - Mock Interview
  - Discussion
- V. Following Up
  - Responding to the Client

Internal Activities and Other Follow-up Actions

**2) Staff Client Service Training Outline**

- I. Overview
  - ◆ Trends in the Legal Marketplace
  - ◆ Importance of Client Satisfaction
  - ◆ How Clients Evaluate Quality Service
  - ◆ Personal Examples of Service
- II. Keys to Satisfied Clients
  - A. Communications

- ◆ Phone Skills
- ◆ Voicemail
- ◆ E-mail
- ◆ Status Reporting and Communication Styles

B. Identifying and Meeting Expectations

- ◆ Taking and Responding to Requests/Assignments
- ◆ Avoiding “No” or “I can’t”
- ◆ Dealing with Angry Clients (Internal or External)

C. Professionalism

- ◆ Attitude and Tone
- ◆ Presentation
- ◆ Communications and Work Product
- ◆ External Contacts
- ◆ Initiative
- ◆ Discretion
- ◆ Follow Up

D. Teamwork

- ◆ Interactions with Colleagues
- ◆ Covering Assignments and Mistakes
- ◆ Being a Team Player

III. Conclusion

### 3) Exceptional Client Service

**Learning Objectives:**

- Increase your business by 15 percent or more annually.
- Generate greater client satisfaction and retention.
- Create your personal brand.
- Understand how to deal with challenging situations and people with ease.

**Training Outline**

Session 1: Exceptional Client Service

- Identifying your brand
- Pre-screening questions to make sure the client is worth your time and learning when it is worth it to lose the deal early
- Address various tips to increase efficiency in all types of personal and professional communication

- Being impeccable with your word/Having integrity
  - Managing expectations
- What to do when you get stumped ...
  - Role-playing challenging situations with clients
- Being someone who people want to work with and refer people to
  - What is your “referability” factor?
- Learning to be a consultant to your clients
  - The tricks you need to know to be client-oriented

### Training Format

- 3.5-hour workshop
- Each training would include 2.5 hours of training, as well as 1 hour for a workshop and for questions

## 4) Delivering KNOCK OUT Customer Service

Effectively diffuse conflict with clients rather than escalating the situation with unique, practical, entertaining and humorous style.

- Why do HUMANS REACT the way they do?
- What is the “NEUROLOGY OF EMOTIONS” and why do we humans react the way we do?
- How can you calm a situation by “BURNING OFF” a client’s adrenaline?
- How can you use “VERBAL JEET” to diffuse situations rather than escalate them?
- What role does “EMPATHIC LISTENING” play in diffusing situations?
- How can you keep yourself calm in CONFLICT SITUATIONS?
- What impact does Emotional Intelligence have on Customer Service in real life “CASE STUDIES”?
- What is the “MAGIC BULLET” in the VERBAL JEET system of resolving conflict?
- Why is EMOTIONAL INTELLIGENCE a KEY SKILL in Resolving Conflict?
- How does good EMPLOYEE RELATIONS play into providing good CUSTOMER SERVICE?
- How do excellent companies keep their focus on good Customer Service ... such as with DISNEY, NORDSTROM, FED-EX, etc.?
- How does establishing a “COMMON UNDERSTANDING” help build “RELATIONSHIP” and “TRUST” with upset clients?
- What STYLE OF COMMUNICATION works best in dealing with upset clients?
- What is the MAGIC BULLET PHRASE to use in resolving conflict?

## Technology

### Why Purchase Legal Technology

9–9:10 a.m.	Introductions, Agenda Review, Meeting Expectations
9:10–10 a.m.	Session 1: Beyond the Buy – Understanding Why

In a market full of options, versions, promises and preferences, how do legal professionals know which technology is critical to running an efficient and client-centric practice? This session will dive deep into five technologies that should find a place in your firm — but we will go beyond “you should buy this, it’s cool” advice and explore the *why* behind the technologies. From understanding why a legal specific time-billing and accounting program can help you stay compliant with the rules governing the management of client trust funds to how using document automation can minimize document errors, this session will provide you with real-world examples of the technologies that will improve your client service.

**Learning Objectives:**

- Explore why law firms and legal departments choose legal-specific technologies.
- Determine best practices for researching and selecting technologies.
- Review real-world examples of improvements made possible by leveraging the benefits from legal-specific technologies.

10–10:30 a.m.            Technology Competency Activity

10:30–10:45 a.m.        BREAK

10:45–11:30 a.m.        Session 2: Risky Business – How to Avoid the Most Common Tech Mistakes

While technology is revolutionizing the way law firms and legal departments conduct their business, we often fail to recognize that technological benefits also come with technological risks. Misunderstanding the cloud, relying on paper in a paperless society, and leaving the people and process out of technology decisions are just a few of the major challenges faced in law firms and legal departments every day. This session will explore the Top 10 Tech Mistakes that plague legal professionals when they take on the technology they need to provide better client service and educate legal professionals on how to avoid the mistakes.

**Learning Objectives:**

- Explore recent technology advances and trends in law firms and legal departments.
- Analyze common mistakes in selecting legal technology.

## Planning and Managing Your Technology

Isn't it time you took control of information technology (IT) within your organization? With IT being both a significant cost and a strategic expenditure, what can you do to manage ROI? What steps are available to maximize the impact of technology, controlling costs where possible, while still benefiting from leveraging that technology to improve profits? How can you set reasonable budgets and manage your team and vendors to ensure that your technology is functioning as intended and on budget? What can we do to stay current enough on the options and conversant enough to speak with computer people?

Join us in this seminar to learn the best ways to plan and manage your team's technology. The program is specifically designed for the manager who does not have a technology background but is now charged

with leading and managing the technology investment in a small to midsize organization, including law firms.

**Learning Objectives:**

- Identify the major cost components associated with technology.
- Plan budgets to acquire the necessary resources needed for success.
- Differentiate between various opportunities for leveraging cloud-based tools.
- Identify optimal software licensing strategies in an organization.
- Prepare and implement appropriate technology policies in a business.

**Course Information:**

- Prerequisites: Basic understanding of computer operations and terminology
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who manage technology investments and applications in small to midsize organizations

## Technology Update

Are you ready to learn about the latest trends in technology? Do you sometimes feel lost in the technology jungle? Would you like clear guidance regarding Windows, Office, the cloud, security and other technology-related issues? If you answered yes to any of these questions, then make plans now to invest four hours in this fast-paced, highly informative seminar that is sure to ramp up your return on technology investment.

The technology tools available to businesses have never been better, but many are not taking full advantage of these tools. This course helps professionals at all levels understand the major trends in hardware, software and services, as well as how to use these tools to meet organizational objectives both efficiently and effectively. More than just a seminar on the latest computers, you will learn about the full spectrum of practical technology available to you and your team and how to implement these tools for maximum impact.

**Learning Objectives:**

- List and describe key features of Windows 10 and identify situations where upgrading might be advantageous.
- Analyze developments in mobile technologies and develop an optimal mobile strategy.
- Identify security issues facing business professionals and list options for mitigating risk.
- List and describe key features of Office 2016 and determine an optimal time to upgrade.
- Identify major trends in hardware, including desktops, laptops, servers, tablets, storage and printing.
- Develop strategies for successful cloud implementations, including document management, workflow, and data storage and synchronization applications.

- Define *virtualization* and identify how it potentially changes the technology infrastructure in your office.

**Course Information:**

- Prerequisites: Fundamental understanding of basic technology concepts
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are interested in how technology affects them and seek an update of relevant technology trends, tools and techniques

# Technology Applications

## Windows 10

Windows 10 has been available since 2015, yet most continue to use it as they used prior versions of Windows, ignoring many features that can be used to enhance productivity and security. In this session, you will learn the best-kept secrets of Windows 10, including how you can use it to minimize the threat of ransomware, integrate with your iOS- or Android-powered device, and how to use Timeline to track your activities for the most recent 30 days.

### **Learning Objectives:**

- Identify options for managing the update frequency of a Windows 10-based PC.
- List at least five new features for improving productivity in Windows 10.
- Differentiate between key new features in Windows 10 for improving security.
- Identify the process for integrating a Windows 10-based PC with an iOS- or Android-powered device.

### **Course Information:**

- Prerequisites: Fundamental knowledge of Windows operating systems
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to improve their proficiency with the Windows 10 operating system

## Microsoft Office 365

9–9:50 a.m.

### **Taming the Inbox**

#### Learning Objectives:

- Identify related messages quickly and easily using Conversation View.
- Create Quick Steps to automate routine, recurring processes.
- Employ drag-and-drop to create new appointments, tasks or contacts from email messages.
- Use folders and categories to organize messages.
- Apply rules to automate email processes.
- Describe how AutoArchive automates the process of cleaning the inbox.

#### Activities:

- Work through real-world examples of how to use Conversation View to quickly manage a thread of email messages.
- Create Quick Steps in Outlook to automatically perform specified tasks.

- Identify situations where drag-and-drop methodologies can be used to save time in Outlook.
- Create folder and categories and use them in tandem to become more organized.
- Build rules to automatically handle in bound email messages.
- Configure and manage Outlook’s AutoArchive.

9:50–10:30 a.m.

**Tips for Excel Efficiency**

Learning Objectives:

- Identify situations in which various Excel features can increase productivity and apply each of these techniques in context, such as Freeze Panes, Split Windows, selecting cells with special characteristics, AutoCorrect, the Office Clipboard, and Paste Special.
- Implement tools and techniques for formatting data in Excel, including multiline column headings, the Accounting Format, custom date and number formats, and Conditional Formatting.

Activities:

- Work through real-world examples of taking advantage of various Excel features to improve efficiency and effectiveness when using Excel.
- Demonstrate why traditional methods of formatting data in Excel generally do not work well.
- Provide examples of how and why such features as the Accounting Format, custom formats, Styles, and Conditional Formats provide superior results.

10:30–10:40 a.m.

**BREAK**

10:40–11:40 a.m.

**Reporting and Analyzing Data in Excel**

Learning Objectives:

- Create tables and take advantage of their advanced features, such as dynamic data ranges, structured reference formulas and the ability to relate multiple tables together into a Data Model.
- Build PivotTables to efficiently and effectively analyze data.
- Use formula-based approaches involving SUBTOTAL and other functions to build reports and analyze data.

Activities:

- Convert an ordinary data range in Excel into a table and identify the primary advantages of working with a table of data.
- Build relationships between two tables to create a Data Model.
- Construct PivotTables to streamline the process of reporting and analyzing data.



- Build reports that use Excel formulae and functions to summarize data, including functions and features such as SUBTOTAL, EOMONTH, and Data Validation Lists.

11:40 a.m.–12:30 p.m. **The Best Features in Word**

Learning Objectives:

- Identify key features for entering, editing and formatting data, including Styles.
- Describe how to create and format tables.
- Define Quick Parts and Building Blocks and how to use them effectively.
- Describe how to integrate Word with Excel.

Activities:

- Illustrate how to use Styles and the benefits associated with using Styles to format a document.
- Provide examples of the utility of tables in Word, including the ability to use them as spreadsheets in a Word document.
- Create Quick Parts and Building Blocks and show how these tools can be used to save time.
- Build examples of integrating Word and Excel, including linking data from an Excel document into Word.

## Office 365 — New Tools, New Tricks

Microsoft’s Office 365 continues to evolve and has likely forever changed how many organizations approach licensing familiar Office applications. As part of the ever-changing nature of Office 365, Microsoft has added several new tools — including Flow and PowerApps — to the suite and has also added many new features to Excel, Word and other existing applications. Join us for this productivity-enhancing session in which you will learn about the new tools in Office 365 and how to improve your productivity by taking advantage of them.

**Learning Objectives:**

- Differentiate Office 365 from traditional licenses of Microsoft Office and identify the license option that is best for you and your organization.
- List the various update alternatives for Office 365 and determine which option is right for different team members and departments within your organization.
- Identify new tools in Office 365 and how they might be useful to you or others in your organization.
- Use new features in Office 365 applications to optimize productivity.

**Course Information:**

- Prerequisites: Fundamental knowledge of computer operations

- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to take full advantage of the products and services offered under Office 365 subscriptions

## Excel Best Practices

As spreadsheets continue to evolve, so too must your practices for creating, editing and auditing them. In this program, you will gain an in-depth understanding of the best ways to work with Excel by learning best practices associated with Excel spreadsheets in each of the following areas: creating and editing Excel workbooks, securing Excel workbooks, collaborating with others in Excel and reporting on data contained in Excel.

Today's best practices for Excel differ significantly from those used in the past. Course materials include relevant examples to enhance your learning experience. Participate in this program to help ensure that you use Excel to its fullest potential.

This course covers features found in Excel versions 2007 and newer.

### **Learning Objectives:**

- List critical spreadsheet design fundamentals.
- Identify techniques used to minimize data input errors.
- Use Excel's Table feature as a foundational component of spreadsheets.
- Identify and implement three different techniques for consolidating data.
- Use various Excel features, such as Go To Special to solve specific spreadsheet issues.
- List and apply four techniques for sharing an Excel workbook and collaborating with others.
- Implement various techniques for auditing and error-checking Excel workbooks, including Trace Precedents, Trace Dependents and Formula Auditing.
- Identify the advantages of working with Defined Names in Excel.
- List and apply six techniques for securing Excel data.

### **Course Information:**

- Prerequisites: Fundamental knowledge of Microsoft Office Excel 2007 or newer
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Excel users who want to learn best practices for working with spreadsheets. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

## Excel Tips, Tricks and Techniques

Excel is the business professional's tool of choice for analyzing and reporting financial data, yet many use time-consuming and error-prone processes to complete everyday tasks. Regardless of your level of experience, if you use Excel, you need this course to learn more efficient and effective ways to work with Excel. You will learn tips, tricks and techniques to improve your general level of productivity, reduce the amount of time you spend on mundane tasks such as formatting, and customize Excel for greater accuracy and efficiency. You will also learn valuable formula-building skills, best practices for linking Excel data from other worksheets and workbooks, and how to streamline report generation and printing processes.

Throughout the program, your instructor will reinforce key learning points with practical, real-world examples that will improve your understanding and comprehension of the topics presented. This highly acclaimed course draws on more than 25 years of experience in delivering spreadsheet training to business professionals, which assures you of the relevance and usefulness of the information and guidance provided during the program.

#### **Learning Objectives:**

- Identify situations in which various Excel features can increase productivity and apply each of these techniques in context, such as Freeze Panes, Split Windows, selecting cells with special characteristics, AutoCorrect, the Office Clipboard and Paste Special.
- Implement tools and techniques for formatting data in Excel, including multiline column headings, the Accounting Format, custom date and number formats and Conditional Formatting.
- Use various formula-building tools to create formulas more efficiently and create various types of formulas, including formulas that manipulate text and dates, contain VLOOKUP and HLOOKUP functions, contain conditional calculations or contain circular references.
- Link data across multiple Excel worksheets and workbooks, update and manage links, and create sum-through formulas and rolling reports.

#### **Course Information:**

- Prerequisites: Fundamental knowledge of Microsoft Office Excel 2007 or newer
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who want to learn how to use Excel more efficiently and effectively. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

## **Microsoft Power BI — Power Reporting for Free**

Power BI, available as a free desktop solution, can revolutionize your reporting processes. The free tool is packed full of features found in solutions that cost thousands of dollars per year. This session will take you on a guided tour of importing data, organizing data, choosing visuals and building a simple report. You will also learn how you can leverage the desktop solution by publishing your reports to the paid Power BI Pro service. This is not rocket science — it is Power BI!

#### **Learning Objectives:**

- Identify key differences between the cloud version and desktop version of Power BI.
- Apply the knowledge gained to integrate Excel data into Power BI.
- Use built-in query tools in Power BI to search for data.
- Create compelling and interactive visualizations to build financial and operational dashboards.

**Course Information:**

- Prerequisites: Fundamental knowledge of computer operations
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to improve financial reporting processes

## Microsoft’s Power Business Intelligence Tools

In today’s business climate, business intelligence (BI) is perhaps the hottest topic in most professional circles. Increasingly, organizations of all sizes are seeking to take advantage of the data available to them to identify previously undiscovered insights and gain competitive advantages thought to be out-of-reach just a few short years ago. A growing array of tools — ranging from Excel add-ins to dedicated solutions such as Power BI — now allow you to leverage your existing knowledge and skills to create powerful, interactive dashboards and analyses unthinkable until recently.

In this program, you will learn how to implement “do-it-yourself business intelligence” using a variety of techniques and tools. You will learn how to work with some of the advanced data query and summarization features in Excel to create Excel-based dashboards, and then you will learn how to leverage that knowledge to build even more powerful BI objects using Microsoft’s Power BI tools.

**Learning Objectives:**

- List the potential shortcomings of BI solutions based wholly on Excel.
- Identify and implement various Excel add-ins that might be useful in BI applications.
- Differentiate between the BI opportunities in Excel and Power BI.
- Create and distribute dashboards using Power BI.

**Course Information:**

- Prerequisites: Basic understanding of computer operations and terminology, including Microsoft Office Excel
- Program level: Advanced
- Advance preparation: None
- Who should participate: Business professionals seeking to develop and implement BI solutions

## Cleaning Data with Excel, Power Query and Power BI

While there are a wide range of ways to analyze data, one must first retrieve, scrub and organize data effectively before any of those techniques can be used. This session will help users understand and utilize end-user data retrieval tools like Microsoft Power Query as well as content packs for Microsoft Power BI to connect, retrieve, reorganize and create scripts to automatically reformat data of all kinds from a wide variety of sources. Attend this session and learn to use these powerful tools to solve and automate your data extraction and transformation processes.

**Learning Objectives:**

- Define the major components included in Microsoft Power Query and Power BI Content Packs.
- Explain how Power Query fits into the Microsoft self-service business intelligence ecosystem (Power Query, Power Map, Power Pivot, Power View and Power BI).
- List the types of data sources that can be accessed using Power Query, Power Pivot and Power BI Content Packs.
- Describe how Power Query transformations can be used to reformat, combine and rearrange data retrieved from a wide range of sources.
- Explain how Power BI and the Excel Data Model provide ways to use this data to create effective reports.

**Course Information:**

- Prerequisites: Fundamental knowledge of computer operations and Microsoft Excel
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to query data from external data sources into Excel and Power BI for analytical purposes. This program focuses on Excel for Windows.

## Advanced Excel

If you are an experienced Excel user seeking to elevate your skills, join this laptop-friendly program. You will learn critical advanced Excel skills in six key areas: 1) collaborating with other users and securing workbooks, 2) using tables to analyze and report data, 3) integrating and manipulating data from external sources, 4) creating and auditing complex formulas, 5) advanced data analysis tools and 6) visualization techniques to analyze and communicate information.

The content of this course draws from more than 25 years of experience in delivering Excel training to other business professionals; throughout the program, relevant, real-world examples reinforce the major topics presented. This course covers advanced Excel topics found in Excel 2007 through Excel 2016.

**Learning Objectives:**

- Identify and implement the best techniques to secure sensitive information in Excel workbooks and collaborate with other users to improve accuracy and efficiency.

- Create tables and take advantage of their advanced features, such as dynamic data ranges, structured reference formulas and the ability to relate multiple tables together into a Data Model.
- Import and link data into Excel from external sources — including text, Access and SQL Server — and use advanced tools, such as Power Query and various cleanup tools, to manipulate the data to meet specific needs.
- Use advanced functions — such as SUMPRODUCT, VLOOKUP, HLOOKUP, MATCH, INDEX, NETWORKDAYS, RAND, RANDBETWEEN, NPV, IRR, XNPV and XIRR — to create and audit complex formulas.
- Analyze worksheet data using techniques such as Data Tables, Subtotals, Slicers, Filters and PivotTables.
- Describe techniques used to create, manipulate and customize charts for analyzing and communicating information.

#### **Course Information:**

- Prerequisites: Experienced Excel user
- Program level: Advanced
- Advance preparation: None
- Who should participate: Business professionals who work with Excel 2007 or newer and want to extend their knowledge with advanced features and functions. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

## Advanced Excel Reporting

This program will help you build advanced Excel reports, including reports where the source data resides in your accounting software or another database. In this seminar, you will learn how to use Open Database Connectivity (ODBC) and Online Analytic Processing (OLAP) to connect Excel to external data sources, such as your accounting software database, to extract data for reporting and analysis. You will also learn how to incorporate PivotTables into your reporting routines, including how to add calculations to your PivotTables, group PivotTable data into fiscal reporting periods and filter your PivotTables using Slicers.

You will also learn best practices for presenting compelling and captivating Excel-based reports and charts, as well as how to use Excel add-ins such as Microsoft's Power Pivot to streamline and automate many of the manual processes associated with building Excel-based reports.

Many business professionals spend far too much time in Excel accessing and converting financial data into useful reports. If there is the chance you may not be taking full advantage of all that Excel has to offer as a reporting tool, then you should make plans to participate in this program.

#### **Learning Objectives:**

- Link and import data from external databases — including multi-table databases — into Excel.
- Use Tables and PivotTables to create accurate financial reports and analyses.

- List and apply Excel shortcuts for formatting financial reports.
- Identify opportunities to work with third-party tools to streamline reporting in Excel.

**Course Information:**

- Prerequisites: Strong working knowledge of Excel 2007 or newer
- Program level: Advanced
- Advance preparation: None
- Who should participate: Business professionals who use Excel for reporting and want to reduce the risk of errors, simplify reporting processes and improve the quality of reports. The program focuses on Excel for Windows, but some of the features can be found in Excel for Mac.

## Advanced Excel Functions — and Formulas

Excel has more than 450 functions, many of which are unused by business professionals. This session will put you on a path to improved Excel productivity by introducing you to powerful but little-used Excel functions, such as IFS (for nested IF statements), AGGREGATE (best described as SUBTOTAL on steroids), GETPIVOTDATA (for producing formal reports from data summarized in a pivot table), CUBEVALUE (for building reports directly from the Excel Data Model) or TEXTJOIN (for joining text or creating CSV files quickly and easily).

**Learning Objectives:**

- Use Excel's financial functions to calculate mortgage interest and principal reduction or perform conventional cash-flow analysis.
- List five Excel functions for making conditional calculations with multiple conditions.
- Explain the general process of using INDIRECT to make report assembly easier.
- Describe the benefits of using GETPIVOTDATA for extracting summarized data from a PivotTable.

**Course Information:**

- Prerequisites: Fundamental knowledge of computer operations and Microsoft Excel
- Program level: Advanced
- Advance preparation: None
- Who should participate: Business professionals who are seeking to maximize the functionality of Excel by using advanced functions and formulas. This program focuses on Excel for Windows.

## Excel with Useful Add-Ins

There are many free or low-cost add-ins available to overcome the limitations of Excel. For example, the free Fuzzy Lookup add-in from Microsoft allows users to match inexact data. Ever try that with VLOOKUP? RiskAMP allows users to perform Monte Carlo simulations for capital budgeting; ActiveData provides users with the means to do sophisticated Benford Analysis and other CAATS techniques; and

the Analysis ToolPak provides a full range of statistical analyses useful in budgeting and forecasting. This session will identify and demonstrate useful add-ins to improve Excel functionality and your productivity.

**Learning Objectives:**

- Identify five useful add-ins to extend the power and functionality of Excel.
- Use the Fuzzy Lookup add-in to match inexact data.
- Explain Benford Analysis and why it is useful in fraud detection.
- Perform linear regression using the Analysis ToolPak.
- Describe the process of performing a Monte Carlo simulation on cash-flow data.

**Course Information:**

- Prerequisites: Fundamental knowledge of computer operations and Microsoft Excel
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to maximize the functionality of Excel by using add-in tools. This program focuses on Excel for Windows.

## Excel Pivot Tables

PivotTables are widely considered the most powerful feature in Excel, yet most business professionals do not use them in their day-to-day activities. In this program, you will learn how to build PivotTables, how to group data inside PivotTables — including grouping options for fiscal periods — and how to create user-defined calculations in your PivotTables. You will also learn advanced PivotTable techniques, including how to build PivotTables that consolidate data from multiple data ranges and PivotTables dynamically connected to external databases and financial accounting systems. Additionally, you will learn how to take advantage of other Excel features associated with PivotTables, including Slicers, Power Query and Power Pivot.

If you have been leery of working with PivotTables or have struggled to realize their many benefits, this course is for you. With a little information, guidance and coaching from the instructor, you will be ready to use PivotTables to analyze and report on very large data sets in a fraction of the time you are spending presently to complete such tasks.

**Learning Objectives:**

- Identify the six main elements of a PivotTable report and their use when creating PivotTables.
- Create PivotTables and manipulate data in PivotTables using grouping techniques, modified Field Settings, user-defined calculations and sorting and filtering options.
- Import and link data from external data sources into PivotTables, and use Tables and Data Models as data sources for PivotTables.
- Analyze data in PivotTables using tools and techniques, such as sorting, filtering, Excel's GETPIVOTDATA function and PivotCharts.



- Apply specific PivotTable techniques to solve problems in areas of PivotTable formatting, creating multiple PivotTables from a single data source, grouping PivotTable data into fiscal reporting periods and keeping PivotTable row order intact.

**Course Information:**

- Prerequisites: Fundamental understanding of Microsoft Office Excel 2007 or newer
- Program level: Advanced
- Advance preparation: None
- Who should participate: Professionals who want to use the power of Excel PivotTables to analyze and summarize data. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

## Data Analysis with Power Pivot

With Power Pivot, your PivotTable reports become even more powerful. Power Pivot can connect directly to many common external data sources or can be used in conjunction with Power Query for superior data import and transformation capability. DAX functions allow users to create sophisticated calculations — both columns and measures — and the relational functionality of Power Pivot provides all the tools necessary for creating an intermediary database from multiple data sources. Put Power Pivot to use immediately by participating in this practical session, which will help you improve your analytical and reporting processes.

**Learning Objectives:**

- Differentiate between ordinary PivotTables and those created with Power Pivot.
- Describe the advantages of working with Power Pivot.
- Explain the procedure for building a PivotTable using Power Pivot.
- Define data models, data analysis expressions and key performance indicators.

**Course Information:**

- Prerequisites: Fundamental knowledge of computer operations and Microsoft Excel, including creating PivotTables
- Program level: Advanced
- Advance preparation: None
- Who should participate: Business professionals who are seeking to improve financial analysis processes by taking advantage of the Power Pivot feature found in Windows-based versions of Excel

## Excel Data Models, Combinations and Consolidations

Combining and linking data from multiple tables, sheets and workbooks is a daily need for many business professionals, yet many do not fully appreciate the breadth of Excel options available for accomplishing this task. In this session, you will learn about the full range of Excel data consolidation functionality, including simple sum-through formulas, auto-merging workbooks, consolidation

PivotTables and linking tables to create powerful Data Models. Simplify and streamline your data consolidation processes, improve your personal productivity and reduce errors with the information contained in this feature-packed session.

**Learning Objectives:**

- Differentiate between various formula-based approaches to consolidating data.
- Implement dummy end-point worksheets or columns to simplify the data consolidation process and reduce errors.
- Differentiate between using Data Consolidation by position and by category.
- Use consolidation PivotTables to combine data from multiple worksheets or workbooks.
- Create a Data Model by linking multiple tables of data and then build powerful PivotTable analyses from the Data Model.

**Course Information:**

- Prerequisites: Fundamental knowledge of computer operations and Microsoft Office Excel
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to harness the power of array formulas to perform calculations in Excel. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

## Mastering the Excel Data Model

The Excel Data Model is an in-memory multidimensional (OLAP) data engine available in all versions of Excel 2013 and 2016. The Data Model is the core foundation of Power Pivot. With the Data Model, users can 1) relate multiple Excel tables, 2) build PivotTables on multiple data sources, 3) import data from external data sources and 4) analyze PivotTable reports using Quick Explore, which allows users to drill up, down and around in reports. This session will provide the knowledge and skill necessary to take full advantage of the Excel Data Model.

**Learning Objectives:**

- Describe the Excel Data Model.
- List the advantages of using the Data Model as a PivotTable data source.
- Create PivotTables from data stored in multiple related Tables.
- Describe the process of relating Tables in Excel 2013 and 2016.
- Explain the process of connecting to external data sources.

**Course Information:**

- Prerequisites: Fundamental knowledge of computer operations and Microsoft Office Excel
- Program level: Intermediate
- Advance preparation: None

- Who should participate: Business professionals who are seeking to take advantage of Excel's Data Model feature. This course focuses on features found in the Windows-based version of Excel.

## Excel Tools for Better Budgets

Excel is the de facto budgeting and forecasting tool for most professionals, yet many who use Excel do not take advantage of the numerous built-in tools available. Among other topics in this session, you will learn how to work with Excel features such as FORECAST, FORECAST.ETS, TREND, Forecast Sheets, XNPV and XIRR. Additionally, you will learn better ways to manage what-if analysis using Scenario Manager and Solver, as well as the value of performing Monte Carlo simulations.

### **Learning Objectives:**

- List key budgeting and forecasting features in Excel.
- Differentiate between Excel's capital budgeting functions.
- Use Scenario Manager to manage different sets of budget assumptions.
- Solve complex, multi-variable equations with Excel's Solver add-in.
- Create Monte Carlo simulations to model risk in budgets and forecasts.

### **Course Information:**

- Prerequisites: Fundamental knowledge of budgeting and Microsoft Office Excel
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to become more efficient and effective in budgeting processes. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

## Excel Financial Modeling

Excel remains the tool of choice for many business professionals when building financial models, including forecasted financial statements and budgets. Yet many of these same professionals have never received any formal training how the best practices associated with generating these types of spreadsheets. By participating in this session, you will learn many amazing techniques that will not only help you to save valuable time when building Excel-based models but also improve the quality of your results.

### **Learning Objectives:**

- Identify 10 best practices for creating financial models in Excel.
- Use Excel features and add-in services for sensitivity, trend and discounted cash-flow analyses.
- Create optimization models using Excel's Solver tool.
- Implement procedures for eliminating errors in Excel-based financial models.

- Incorporate various formatting techniques to improve the usefulness of reports.

**Course Information:**

- Prerequisites: Fundamental knowledge of computer operations and Microsoft Excel
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to utilize the Windows-based version of Excel more efficiently and effectively when creating financial models, plans, and analyses

## Word Tips and Tricks

Like most Microsoft Word users, you can get through the basics of creating a document and applying some formatting characteristics. But do you use Word Styles or Quick Parts? Do you know how to generate a Table of Contents automatically from a document? Can you insert Excel-like formulas into Word Tables? If your answer to any one of these questions is no, then don't miss this opportunity to improve your knowledge, skill and productivity in using Microsoft Word.

**Learning Objectives:**

- Identify key features for entering, editing and formatting data, including Styles.
- Describe how to create and format Tables.
- Use the Navigation Pane to navigate or rearrange a document quickly and easily.
- Define Quick Parts and Building Blocks and how to use them effectively.
- Describe how to communicate better with charts, SmartArt and screenshots.

**Course Information:**

- Prerequisites: Fundamental knowledge of computer operations and Microsoft Word
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to use the Windows-based version of Microsoft Word more efficiently and effectively

## Top PDF Features

Stop struggling with PDFs! Using Adobe Acrobat and other PDF tools provides access to several features that make working with these common files a breeze. In this course, you will learn how to use tools and features — such as PDF forms, redaction, converting PDFs to Word and Excel files, electronic signatures, creating and applying tick marks, building indices and catalogs, portfolios, and securing PDF documents — to their fullest to work more effectively and efficiently with PDF documents.

The popularity and usefulness of PDFs increases daily, but most PDF users have not learned how to manipulate PDF documents effectively. Instead of struggling and straining with these very common files, join us in this program to learn the top features necessary to optimize your work with PDF documents.

**Learning Objectives:**

- Reorganize and manipulate PDF documents — including applying bookmarks — to meet specific needs.
- Create and distribute PDF forms and automate the process of collecting and summarizing form response data.
- Mark up and edit PDF documents and apply tick marks.
- Secure PDF documents and facilitate electronic approvals and signatures.
- Convert PDF documents to Word and Excel files.

**Course Information:**

- Prerequisites: Fundamental knowledge of basic PDF operations
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to become more efficient and effective when working with PDF documents

## Personal Technologies

Technology impacts us not only in our personal lives but also in our business lives. Complicating matters, it sometimes can be difficult to distinguish between the two. In this session, you will learn about many of the technologies that can help you at home and the office so that you can be more efficient and effective. Examples of tools discussed in this session include personal hardware, apps, speech-to-text, notetaking tools and audio-visual technologies.

**Learning Objectives:**

- Identify key hardware options for improved productivity.
- List examples of how to securely synchronize data.
- Identify how audio-visual technologies are an important consideration in today's business climate.
- List example of apps that can have a positive impact at both a personal and a professional level.

**Course Information:**

- Prerequisites: Fundamental knowledge of basic technological concepts
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to identify new and emerging technologies to solve everyday issues



# Security

## Cybersecurity Audit Preparation

Law firms face increasing pressure from clients to demonstrate compliance with regulatory requirements and industry best practices for protecting confidential information against data breaches. Being prepared to respond to cybersecurity questionnaires from key clients or auditors has become an important part of the business of law today. With each questionnaire different from the next and some spanning hundreds of questions, this can be a lengthy and daunting task. Is your firm prepared to pass an information security audit requested by a key client? Can you demonstrate compliance with regulatory requirements for data security and privacy? In this session, you'll learn how to better prepare your firm to effectively respond to information security questionnaires and audits.

### **Learning Objectives:**

- Learn the main standards and best practices businesses are now asking of their legal counsel
- Discuss strategies and tips for the easiest and best response to your clients
- Understand why having a robust information security plan is essential to winning and keeping key client relationships.

## Cyber Insurance

Cyber Insurance is the newest and most misunderstood insurance product on the market. Many businesses are left scratching their heads: should we buy a standalone cyber insurance policy, or will our professional liability or business owners policy be sufficient? This lecture aims to educate decision makers on the whys and hows of purchasing cyber insurance.

Who should attend:

This lecture is appropriate for a wide selection of attendees, including but not limited to:

-Anyone responsible for financial decision making or who negotiated with vendors – CEOs, CFOs, Office Managers, etc.

-Anyone in Human Resources who can disseminate literature to employees or who is responsible for putting new employee protocols/procedures into place

Topics covered include:

-Recent law changes that expose firms to potential fines and penalties

-Cyber breach statistics and real life horror stories

- Costs associated with a cyber breach

-Law firms' unique exposures and how a breach can affect your firm

-Coverages to look for when purchasing a policy

- Pitfalls to avoid when purchasing a policy
- How to talk to your broker about Cyber Insurance
- How to legally protect your firm against breaches caused by third parties
- How to instate an employee IT Safety handbook and other HR-related issues
- Question and answer session

#### Session Schedule:

This session will be broken into three parts that will total approximately 3 hours, including three fifteen-minute breaks and a question-and-answer session.

#### Part 1- Why purchase cyber insurance?

Break- 15 minutes

#### Part 2- How to buy Cyber Insurance

Break- 15 minutes

#### Part 3- How to protect your firm and lower your premium

Break- 15 minutes

Question and Answer session

#### Options for shorter sessions:

This lecture can be shortened based on the amount of time permitted. For example, it can be reduced to an hour or even as short as a half hour. Additionally, the presentation can be more or less technical, or the subject matter adjusted based on the audience.

## Security — A Practical Guide

It's not a matter of *if* you will have a security incident, but *when*. Learn the steps you can take to protect yourself. This course will cover multifactor authentication, password managers, encryption, mobile device management, anti-virus, firewalls, policies, tools and other techniques that you can apply immediately. Spending more does not make you more secure. Doing the right things can. Are you doing the right things to be secure?

#### **Learning Objectives:**

- List three tools that enhance security.
- Describe the security risk environment.
- Specify a business case for security training.
- Name a tool that enhances security and reduces risk.

#### **Course Information:**



- Prerequisites: Fundamental knowledge of basic technological and security concepts
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to enhance the security surrounding both personal and organizational data

## The Administrator's Role in Data Security Compliance

Law firms increasingly must be able to prove compliance with both government and client requirements for managing cyber risks and protecting against data breaches. Firms must demonstrate enforcement of a current information security plan that includes specific best practices and standards. Supervising this effort has become an important part of managing a law firm today. What is the administrator's role in managing the firm's information security plan and compliance efforts? How can you effectively take on this responsibility, boost your skills, and increase your value to your firm? In this session you'll learn the basics of what a firm administrator should be doing to successfully handle this new management responsibility.

### **Learning Objectives:**

- Understand the increasing business and regulatory demand for data security compliance
- Discuss how a formalized information security compliance plan is now part of managing the firm
- Learn how to successfully take on this responsibility and boost your value as an administrator

## Why Law Firms Should Worry About Cyber Risks

According to a recent American Bar Association survey, 1 in 4 law firms with 100+ attorneys have already suffered from data breaches. Making things worse, 52% of firms with under 50 attorneys now report having had one or more cyberattacks or breach incidents. Law firms and their clients are recognized as a major target for hackers and cyber criminals. Is information security and privacy compliance a top priority with your firm's management and leadership? Is your firm prepared to survive even a small data breach incident? Does your firm meet client expectations for information security practices? From this session, you'll get the latest insights and advice to lead a robust management discussion about prioritizing cybersecurity and breach preparedness in your firm.

### **Learning Objectives:**

- Learn about the latest risks to law firms and why most firms are easy targets
- Understand client expectations for information security and privacy practices
- Create a checklist of essential points of discussion for your next management meeting

### **Securing Your Data**

Security is not optional, and yesterday's security techniques are not working to minimize today's threats. Therefore, now is the time for you to tune up what you know about protecting sensitive data. In

this program, you will learn about the latest tools and techniques for securing your data, including encryption, virus protection, secure communications, electronic signatures, secure authentication and more. You will also learn how to implement a practical, five-step approach for securing your PC and the types of questions you should be asking of your staff to ensure server-based information remains protected. Extensive demonstrations will be used to teach the techniques and concepts presented.

Security failures, such as a breach of client or customer data, are costly — they can even drive your company out of business. What are the security tools you need, and how do you use them to secure your sensitive data and systems? Participate in this program to learn how you can implement viable and practical solutions to mitigating today's security threats.

**Learning Objectives:**

- Assess the relevant security risks in your organization.
- Identify specific tools and techniques to protect sensitive data.
- List five specific steps to improve PC security.
- Implement security procedures to improve organizational security.

**Course Information:**

- Prerequisites: Basic understanding of computer operations
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals seeking to secure sensitive data

## How to Respond to a Data Breach

It's not a matter of if your firm will suffer a data breach, but when. A botched response to even a small intrusion will almost certainly make the consequences of a breach worse, turning it into a potentially costly and disruptive incident. What are the steps you should be taking to meet the ethical and regulatory requirements for responding to a breach? What should you do to protect your clients and maintain your firm's good name? When should you report an incident to authorities? How do you minimize the financial damages and disruption? In this session you'll learn the answers to these questions and more. See what a formalized breach response plan should look like and learn how cyber insurance can help mitigate disastrous financial liability.

**Learning Objectives:**

- Understand what qualifies as a breach, and what a single incident could cost your firm
- Discuss the responsibilities and steps for handling even a small data breach incident
- Learn how cyber insurance can help mitigate the financial damages and recovery costs of a breach

## Manage Your Firm's Cyber Risks and Compliance (Firm-Specific Training, Analysis and Planning)

Every law firm must implement and maintain a current information security plan that is compliant with government and client driven standards for data security and privacy. Unfortunately, few firms can demonstrate ongoing compliance with evolving cybersecurity standards and face significant financial and reputational risk.

Getting everyone in the firm on the same page and following proper cybersecurity policies can be tricky, if not painful. In this on-site, firm specific session, you will get expert insights and tips for getting attorney buy-in and creating a management plan and a culture of security from the top down. Whether you are looking to solidify management commitment and kick-start your firm's cybersecurity and compliance efforts, or it's time to review and bolster your current information security plan, this session is for you.

This unique, individualized, firm-specific session includes essential management training, plus high-level assessment and analysis of your firm's current data security and privacy efforts. Your management team will come away from this session with a clear understanding of the responsibilities and actions to be taken to reduce risk, meet compliance requirements and effectively manage ongoing risk management efforts.

### **Learning Objectives:**

- Understand the actual risk to the firm – financial, reputational, client loss, legal liabilities
- Learn how cyber criminals target and attack firms
- Understand the regulations and industry standards your firm must comply with
- Understand client expectations for data security and privacy
- Establish an information security compliance team
- Learn what a simple and complete information security plan should include
- Prioritize next steps to improvement, compliance
- See examples of cyber risk management reports you should have

## Data Breach Compliance

Law firms increasingly must be able to prove compliance with both government and client requirements for managing cyber risks and protecting against data breaches. Firms must demonstrate enforcement of a current information security plan that includes specific best practices and standards. Supervising this effort has become an important part of managing a law firm today. What is the administrator's role in managing the firm's information security plan and compliance efforts? How can you effectively take on this responsibility, boost your skills, and increase your value to your firm? In this session you'll learn the basics of what a firm administrator should be doing to successfully handle this new management responsibility.

### **Learning Objectives:**

- Understand the increasing business and regulatory demand for data security compliance
- Discuss how a formalized information security compliance plan is now part of managing the firm
- Learn how to successfully take on this responsibility and boost your value as an administrator

## Password Management and Loss Prevention

### 1) Security Awareness Training for Employees

*Employees, including executives, can be your first and last line of defense against hackers and cyber criminals. Computer users are the source of all kinds of problems including ransomware infections. It's vitally important that every employee in your firm, including partners and executives, get security awareness training on a regular basis. While there are online options for security training, sometimes it makes sense to bring your teams together and go through a live, interactive training with a security professional with Q&A time to address the specific needs of your firm. This brief, but comprehensive training course helps build a culture of security and may be just what you need to wake employees up to the seriousness of today's risks.*

#### **Learning Objectives:**

- Computer security basics; passwords, internet use, etc.
- Email phishing, spear phishing, ransomware
- Mobile device, wi-fi security
- Physical security; keys, office environment, etc.
- Safe telecommuting practices
- Social engineering
- Secure data disposal
- Security incident response

### 2) Data Loss Prevention (DLP)

Data loss prevention (DLP) is a means of creating and enforcing security policies in an organization. For example, with DLP, you can create rules that programmatically block all outbound email messages containing information such as Social Security or credit card numbers. Unfortunately, most business professionals have yet to discover DLP and how it improves security. Likewise, most business professionals have yet to discover and implement password management tools, which are all but a necessity when attempting to enhance personal and organizational security.

In this session, you will learn the fundamentals of DLP and password management tools and, through demonstrations, see how you can use DLP and password management tools to enhance organizational security.

#### **Learning Objectives:**

- Define data loss prevention and list examples of how it can enhance organizational security.
- List examples of tools and services available that support DLP.
- Identify the process for creating DLP rules in common tools, such as Excel and Exchange Online.
- List the key characteristics of “long-and-strong” passwords.
- Differentiate between leading password management tools.
- Identify alternatives to passwords to improve authentication controls.

**Course Information:**

- Prerequisites: Fundamental knowledge of computer operations
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to become enhance the security and privacy of sensitive data

## Spam, Virus and Malware Protection

Bad actors want inside your systems and want to steal your data. They can attack your systems directly or use your email inbox. This session explains the protection options for spam, virus and malware. Top tools and techniques will be discussed with multiple solutions discussed in each area.

**Learning Objectives:**

- Identify threats that need protection.
- Differentiate the most effective protection methods.
- List the protection options that you can use.
- Apply the knowledge to protect your systems.

**Course Information:**

- Prerequisites: Fundamental knowledge of computer operations and security needs
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to increase the security of sensitive and critical data

## Ransomware — Reducing Your Risk

Ransomware, which plagues individuals and businesses of all sizes and in all industries, represents one of the biggest security threats we face today. Yet few are taking the steps necessary to reduce the risk associated with the potential loss of data or breach of confidential information associated with ransomware. In this course, you will learn how you can implement an effective system of control to mitigate the risk.

Imagine turning on your computer one day to find that all your data files have been encrypted and a criminal holds the key necessary for you to regain access. This is a classic ransomware scenario — one

that affects hundreds of thousands of computers each year. Learn the best practices for reducing the chances that your data is held hostage, as well as key recovery tactics in the event that your preventive efforts fail.

**Learning Objectives:**

- Define ransomware and identify the risks it poses to you professionally and personally.
- List the top methods by which ransomware infects an individual computer or a network.
- Implement control methods to help reduce your risk of becoming another victim of ransomware.

**Course Information:**

- Prerequisites: Fundamental knowledge of basic technological and security concepts
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to reduce the risk of losing data in a ransomware attack

## True Tech Crimes

Security is a top concern for business professionals, yet many hacks result from the failure of organizations to implement effective internal controls over information technology. This session will teach you about critical IT-related controls in a case-study approach using examples from recent breaches and security failures to help you better understand how to protect your company and its data. Attend this fast-paced session and learn more about IT-related controls, which can be used to prevent computer crimes such as unauthorized access, theft of information, identity theft, data exfiltration, tax refund fraud and more.

**Learning Objectives:**

- List at least three major security incidents reported in the headlines in the last two years, and explain at least one major control design or operation flaws which allowed the hack to occur.
- Define the three factors used to authenticate someone to a system, and explain why two-factor authentication is preferable to one-factor authentication.
- Explain why home-grade computer hardware and applications are inherently less secure than business- and enterprise-grade hardware and applications.
- List at least three best practices learned as a result of reviewing the incidents cited in the case studies.

**Course Information:**

- Prerequisites: Fundamental knowledge of basic technological and security concepts
- Program level: Intermediate
- Advance preparation: None
- Who should participate: Business professionals who are seeking to enhance the security surrounding both personal and organizational data