

# Litigation Support TODAY™

A MAGAZINE FOR THE LITIGATION SUPPORT PROFESSIONAL

## CAREER FOCUS

# Creative Training Strategies



## Improving ROI with a Tight Budget

By Erika Santiago

In law firms and corporations of all sizes, the nation's economic downturn has prompted significant budget cuts, and often among the items slashed are training and development. In an employment market where even the most educated and experienced people are happy just to have a job, many organizations forego professional development activities altogether. Companies are wise to maintain some development priorities, even on a smaller scale, to remain competitive and well-positioned when the employment market swings back to where it was a few years ago. Attracting and retaining the best employees still requires some investment and it is almost always less expensive to invest in existing employees than to hire new ones.

Unlike attorneys or paralegals, litigation support managers and their staff have no for-

mal set of requirements for continuing education. Yet their jobs require knowledge and understanding of the latest procedural rules and ever-changing technology applications. Managers are now faced with finding creative ways – on limited budgets – to ensure that they and their staff keep abreast of the latest tools and processes for successfully supporting their firms or law departments.

Traditional training forums for litigation support personnel, including formal classroom settings with certification programs and conference sessions, are still popular for professionals seeking a thorough introduction to or a higher level of knowledge of a specific topic. Some newer methods of learning or professional development also are available today, such as online or remote learning forums.

Learning is not a linear process; it includes exploration and connecting the information

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that is available. Many learning opportunities are available to litigation support professionals today, not all of which are labeled “training,” and in today’s economic environment, the key is to leverage every educational opportunity to maximize its return on investment (ROI). Additionally, managers can help their employees take greater personal responsibility for their own professional development to benefit themselves, the entire department, and the organization as a whole.

### Creative Alternatives to Formal Training

People have different learning styles but we know that one of the ways in which adults learn best is when they are challenged to share knowledge with someone else. It gives learning a purpose. Being too busy is never a good excuse to avoid learning something new – especially in our industry. Litigation support moves at too fast a pace for us to sit still. So how can litigation support managers help their teams filter the extreme volume of information that is available?

By moving the focus from formal training to learning experiences, litigation support managers can provide educational opportunities that both challenge and teach necessary skills. Here is one 4-step learning exercise that is easy to implement:

#### 1. Define the learning objective.

Is it to learn a skill that will increase efficiencies? Project management? Communication? Industry best practices? Presentation skills? Leadership skills?

#### 2. Define the research topic.

For example, industry best practices for data

collection and preservation.

#### 3. Assign a research resource.

Assign each team member a type of resource to research and report back to the group on the information found.

Continuing the example above of best practices for data collection and preservation, some sources might include:

- *Web sites*
- *Blogs*
- *Articles and publications*
- *Published research studies*
- *White papers*
- *Podcasts*
- *Webinars*

**4. Present your findings.** Establish a time for a final report on the learning experience to be presented as a roundtable or “brownbag” discussion for your



about how the team explains these best practices to their attorneys and paralegals. This learning exercise allows everyone to take away from the experience greater knowledge about the topic.

An alternative to the process outlined above might be to assign each team member a single research resource—article, blog, webinar, podcast, etc.—on different topics. Each team member is required to report back to the group at the next team meeting on his assigned topic. This exercise also can be done in small teams in which two or more team members (think team-building project) research a topic to share with the rest of the department and/or case teams.

To encourage critical thinking, ask about each person’s thoughts on the motivation behind the resource researched. For example, was the author of the article a con-

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team. This information can later be redelivered as a presentation for your attorneys and/or paralegals.

The objective above was to learn and share information about best practices for data collection and preservation. The research may also generate discussion

sultant? A lawyer speaking from experience or important lessons learned? Or was the webinar an educational marketing presentation from a software company or service provider? Discuss how the author’s or sponsor’s motivation might have played into the presentation of the information.

In regard to these sources, keep in mind that some of the industry’s most experienced and knowledgeable experts and thought leaders happen to work for technology developers or service providers. These individuals often share their expertise in a genuine effort to educate and improve the industry as a whole, so their insights should not be discounted strictly based on who their current employer might happen to be. Having said that, some vendors do provide

### Take Advantage of Free Tutorials and Product Demos

Free software training resources may be available online for specific applications, such as Microsoft Office. Polish your Access skills, for example, by taking advantage of their free training catalog (<http://tinyurl.com/2lrw37>).

Even if your firm has a vendor host all of your projects, it can’t hurt to avail yourself to the free training offered by traditional litigation support software companies:

- Concordance: <http://tinyurl.com/dhtl5w>
- Relativity: <http://tinyurl.com/c52cuo>
- CTSummation: <http://tinyurl.com/cr823y>
- Ipro: <http://tinyurl.com/dkua75>
- iCONNECT: <http://tinyurl.com/cqeyma>
- Caselogistix: <http://tinyurl.com/djvcax>
- Attenex: <http://tinyurl.com/d4dvq8>
- Nexidia: <http://tinyurl.com/c2xf5j>
- Clearwell: <http://tinyurl.com/crb4la>

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educational material as part of a sales initiative which is why it's useful to consider their motivation and whether the information is presented in an objective manner.

### Maximizing the Return on Your Training Investment

Formal training can become a train-the-trainer opportunity for your firm, corporate legal department or government agency when the budget is tight. If there is enough money in the training budget to send someone on the team to a traditional training program, that person should be expected to share their learning experience with the rest of the team upon their return. For this reason, it is important to choose the attendee wisely if you have the budget to only send one individual. The attendee should be someone with good listening and presentation skills, to ensure he or she is capable of effectively communicating with and training the team on what he's learned. This process of sharing of information itself can be a professional development opportunity for some staff.

Other traditional training resources are trade shows and conferences. However, to achieve the maximum return on your training investments, be sure to assess how each of your team members learn new information. The traditional classroom setting with a single instructor is ideal for some learners while the standard conference style of many presenters or panelists covering several topics is better for others. Take the time to evaluate and ask questions to determine the best learning environment for each of your team members.

### Take Advantage of Free Training Opportunities and Products

Don't forget that a lot can be learned from a product demonstration. Ask your software vendors to send you a flash demo of their product that provides a basic overview of what it does and how it can be used (see sidebar on page 26 for a list of free tutorials and product demos). This free demo

can become a foundational starting point for one-on-one training on how the tool is used within your department or firm. These product demonstrations can be useful for responding to case teams about what each tool does and some firms even incorporate this information into paralegal and attorney training programs. Many vendors have demos available on their corporate Websites or on video sites such as YouTube.com. If you have a customized implementation or wish to have greater control over training content, you can easily record your own software demo or webinar using tools like TechSmith's Camtasia ([www.techsmith.com](http://www.techsmith.com)).

YouTube is another great up-and-coming resource for free training. Some organiza-

have options for customized programs or alternative delivery formats of the workshop(s) in which you and your team are interested in attending. For example, many independent software consultants/trainers have the flexibility to offer web-based training as well, and some are offering training programs on a CD. Other organizations are offering their training in locations outside of their headquarters.

Free or low-cost webcasts are available through a number of industry organizations including the national and regional litigation support associations and the International Legal Technology Association ([www.iltanet.org](http://www.iltanet.org).) Kai Williams-Slaton, ILTA's Atlanta Volunteer City Representative



tions post conference town halls and seminars on YouTube, and you can find things like representational video clips from a "meet and confer" training video starring the judge from the famous *Zubulake* case. Because some firms may not allow access to sites such as YouTube from office computers, your team may have to view such information from home. It is important to have group discussions about YouTube content because not all of it is entirely accurate. Other video or presentation hosting sites have a lot to offer as well. For example, check out [www.Vimeo.com](http://www.Vimeo.com) and [www.brighttalk.com](http://www.brighttalk.com).

Thanks to today's technology, you may

(VCR) noted that, "In addition to education through free webinars, IITLA holds local monthly meetings on a variety of topics to expose our membership to trends and technology available in the marketplace."

A number of service providers and software developers such as Clearwell, Anacom (Caselogistix), Exterro, and iFramework also offer free webinars either on-demand or as scheduled events. Some of these may be part marketing and part education, but as long as you understand the motivation behind the message, you and your team can glean good information about technology, trends, best practices and what your litigators and clients

might be thinking. Also, look for webinars that are stored on-demand so you can control how the message is delivered (with the ability to pause, fast forward and rewind as needed.) These webinars are also a great teaching tool for your paralegals and attorneys.

### Take Control of Your Own Career Development

Ultimately, it is the responsibility of the individual to identify his career goals and set learning objectives to meet those goals. Our industry today has many opportunities to develop subject matter expertise on software and technology or best practices and project management. Making a personal investment in your continued education in litigation support is well worth the time, effort and money.

Membership dues to certain legal industry associations such as ILTA (<http://tinyurl.com/cyv8v2>), ALSP (<http://tinyurl.com/5o27pr>), Women in e-Discovery and the regional NALSP organizations are minimal compared to organized professional groups within other industries. In addition to great networking opportunities, involvement in these organizations includes plenty of members-only educational resources.

Individuals also can stay up-to-date with industry news and trends by subscribing to or visiting industry-related Websites and blogs. Setting up a Google alert for keywords such as “electronic discovery” or “litigation support” only takes a few minutes and will keep you updated on a daily basis with news, blogs and press releases. As a litigation support professional, it also makes sense to understand how attorneys view electronic discovery and what resources are available online.

Listservs are another great way to stay abreast of developments in the industry and network with fellow litigation support professionals. The LitSupport Listserv was founded over a decade ago and has over 8,000 members (see “Litsupport Listserv Turns Ten,” *Litigation Support Today*, November 2008/January 2009), so if you haven’t signed up for this resource yet, definitely do so and then set your e-mail to

### *In today’s economic environment, the key is to leverage every educational opportunity to maximize its return on investment.*

automatically send the messages to a designated folder so you control when you read them.

The next time a sales person invites you to lunch, instead of talking about the weather or last night’s baseball game, ask about their perspective on how the economy is affecting the litigation support and e-discovery industries and what their company is doing to maintain their stability. Ask if they know what the other firms in your market are doing. They don’t have to name names but industry intelligence is a great learning opportunity. Another option is to not go to lunch at all, but instead schedule a meeting with your team and ask the sales person to bring along (in person or via conference call) their smartest tech person. Let your team ask questions about EDD and processing best practices based on case examples you’ve recently encountered to learn other—maybe more efficient—ways to achieve the project objectives.

Litigation support managers, like other department managers in law firms and corporations of all sizes and in all industries, must find new and creative ways to maximize dwindling training and development budgets. Especially in a down economy when morale might be suffering, challenging your staff to

continue learning and growing professionally will benefit them, the department, and the entire organization both in the short and long-term. **LSJ**

*Contributor:* Material for this article was contributed by Erika Santiago. Ms. Santiago is a Certified Trainer in several litigation support applications and has administrator and end-user product expertise in a wide range of litigation support applications. Her experience includes litigation support management, project management, consulting, training and sales roles at Holland & Knight, LLP, King & Spalding LLP, Miami-Dade Community College, Georgia Perimeter College and iCONNECT Development, LLC before joining LitWorks™ as a national training and development manager in 2005.

*Editor’s Note:* A number of lengthy URLs have been reduced in size for publication by using the tinyurl. See <http://tinyurl.com/> for more information.

