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To Train or Not to Train? That Is the Question

By Sharon Meit Abrahams

A practice group leader calls the head of the professional development department and says, "My practice group needs a team-building workshop." It would be easy to gather team-building materials, run off to the nearest fancy resort and conduct a half-day session in an effort to create a cohesive work group. Unfortunately, training as a solution is most likely a perceived need rather than a legitimate one. A legitimate training need is when a person or persons do not know how to perform a task, lack a skill or are missing knowledge. These are remedied by training. More often than not, the issue is not a training matter, but rather an outcome of poor management or lack of proper procedures.

Conducting a Needs Assessment

True training needs are determined by conducting a needs assessment. The following are starting points:

- review of financial reports;
- collection of poor work product;
- experience of high turnover;
- analysis of exit interviews; and
- receipt of client complaints.

A needs assessment should be conducted when performance is inappropriate or inadequate. This means when one or more attorneys or staff are not doing what they should be doing, or they are doing something they should not be doing. A formal needs analysis can uncover the problem when there is a performance discrepancy, a difference between what someone should be doing and what they are doing. This is called a *skill gap*. The goal is to move from actual performance to desired performance.

In the case herein, the practice group leader believes her attorneys are not functioning as a team: What has given her this impression? Are the hours in the department low, are clients calling to complain, are associates leaving the department? Has she gathered enough information to determine that a training program on team-building is the solution to her perceived problem? Probably not.

There are multiple methods to gather data in an effort to bring the performance gap into focus.

Table 1

Methods for Assessing Training Needs

Data Collection Techniques	**Primary Strength**	**Primary Weakness**
Business data review	Provides objective data	Reflects past situations
Interviews	Obtain in-depth information	Usually labor intensive
Focus groups	Provides qualitative focus	Direction of discussion may be swayed by informal leader
Questionnaires	Narrows direction of investigation	Does not give in-depth information
Observation	Provides a reality check	Usually labor intensive
Performance data reviews (e.g., performance appraisals)	Establishes criteria	May be confounded by other variables
Job requirements review (e.g., job descriptions)	Provides objective data	Usually takes a long time
Skills test	Results are easily quantified	Does not measure on-the-job competencies

The Questionnaire

Each of these methods have time and cost variables that will affect their use in a particular organization. The most common, yet least effective, is the questionnaire. It is easy to administer, but results in the least effective data. A questionnaire, to be truly effective, needs to be validated for its reliability, which takes an extensive amount of time and effort to achieve. In some situations, it is possible to find an “off-the-shelf” questionnaire that can assess a training need. One of the best techniques for gathering data is through individual interviews. This is the most costly avenue in both time and labor, but provides the most detailed information.

The key to successful interviewing is in the preparation and the questions asked. Begin the needs assessment by outlining what is already known, and validate any information that is uncertain. Continue the assessment by collecting and reviewing any documentation that is pertinent. Once all the collectible information is gathered, look for “holes” in the data and outline probing questions to ask during the interviews.

When using interviews as a part of a needs assessment, it is critical to ask consistent questions, or more specifically, the SAME question. Close-ended questions uncover factual information. For example:

- Who do you work with in this practice group?
- How many hours do you bill in a month?
- Who gives you work assignments?

General open-ended questions uncover opinions and attitudes, and often result in information that was not originally sought. For example:

- How does the work assignment process work?
- What is your opinion about how the team works together?
- How would you improve the situation?

Collect the answers in a format that can be easily tallied and reviewed. The person analyzing the data should look for common themes in work product or knowledge to determine a training need. No matter which method is used to acquire data, the key is to gather as much information as possible. To verify a performance discrepancy, also review the following:

- documents or reports about work performance;
- established standards for performance;
- evidence showing how problems affect department/organization;
- quantified standards of performance; and
- a pattern that seems to be occurring.

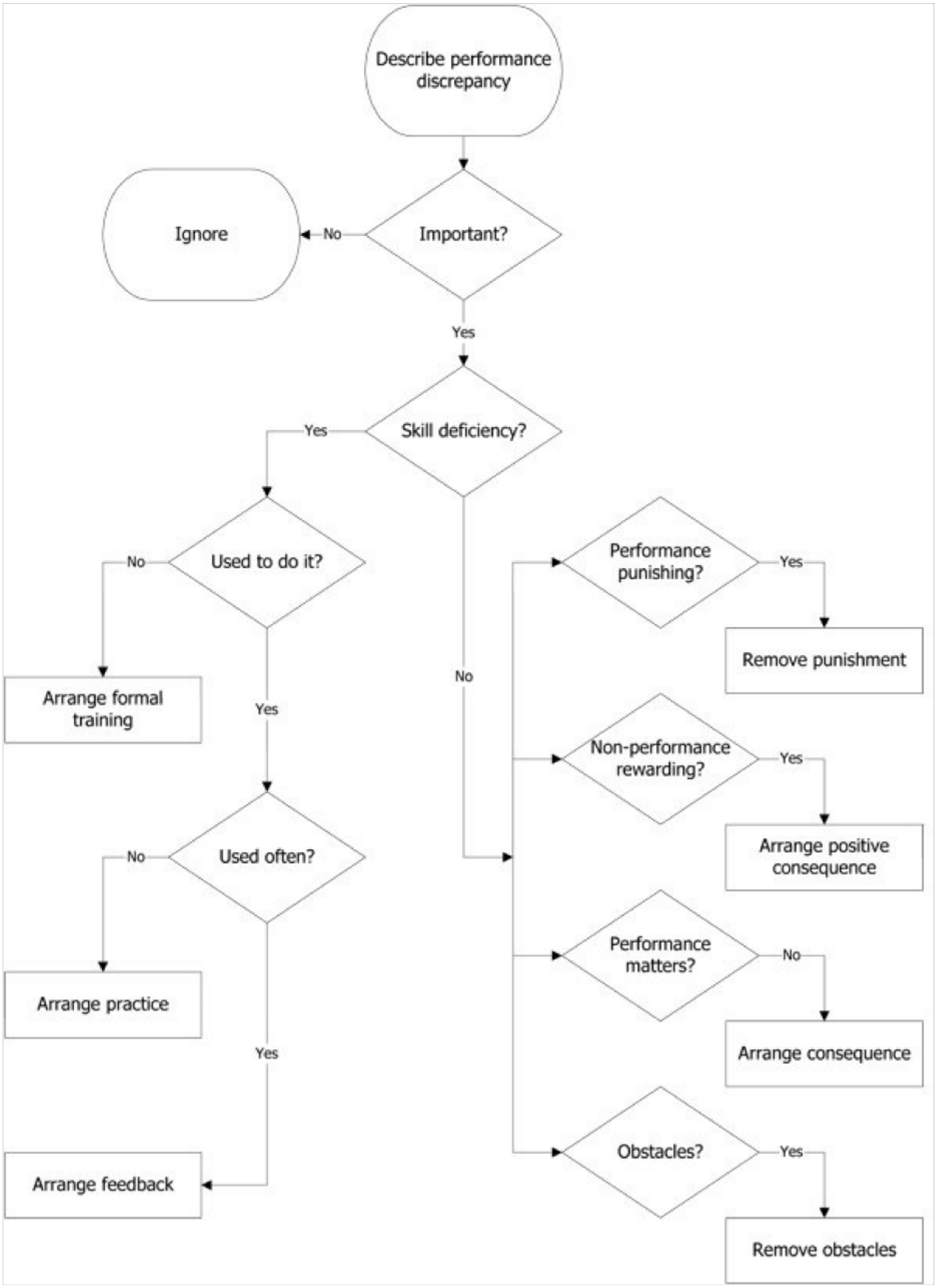
If it is determined that the performance discrepancy is serious enough to warrant action, then training solutions should to be explored.

Analyzing the Data

In the team-building matter from above, the data showed that everyone liked one another well enough, but that work was not disseminated equally across the attorneys in the practice area. This caused friction among the attorneys whose billable hours were low. It was determined that a training program was not the solution to the problem. A review and revamping of the work assignment process was the key to building a productive team.

Management and supervisory level attorneys have the difficult task of guiding and overseeing work product from individuals. Often, attorney managers notice a performance problem, but have little experience in assessing the discrepancies. Using a modified form of the Mager Pipe model of performance analysis, the manager can pinpoint which direction to follow. That model (pictured right) points out that performance discrepancies often fall into a management or supervisory issue and are rarely training issues.

Attorney managers turn to training as a solution for many non-training issues. Using the Mager Pipe model to focus on the real causes of performance problems will allow the attorney to solve performance problems more effectively. If the practice group leader who made the team-building request had looked at the Mager Pipe model, she would have noted that the lack of teamwork was not a skill gap, but rather there was an obstacle impeding her team's performance, namely the assignment process.



Conclusion

A needs assessment can seem a daunting task because it is such a broad effort, but in the end, it can save time and money. The key is to conduct the assessment within a manageable time frame, allowing review and evaluation of the data prior to designing possible solutions. It might turn out that you do not need to do any training after all.

***** **Dr. Sharon Meit Abrahams**, a member of this newsletter's Board of Editors, serves as Director, Professional Development/Diversity & Inclusion for Foley & Lardner LLP.