# 2016 PDI

Professional Development Institute

December 1 – 2, 2016 | Washington, DC | Mandarin Oriental | #NalpPDI

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PDC Professional Development Consortium

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2016 PDI
Professional Development Institute

# 2016 Professional Development Institute from NALP and American Law Institute CLE

## In collaboration with the Professional Development Consortium

The **2016 Professional Development Institute** is the must-attend conference for learning about current trends in lawyer professional development, exploring key issues facing the legal industry, hearing about proven programs to give your lawyers and law students the competitive edge they need, and networking with over 300 law firm and law school PD contacts. If you are responsible for professional development in a law firm, law school, corporation, or government agency, the **Professional Development Institute** will equip you and your organization to stay ahead in today's challenging environment.

> "The sessions had many great takeaways and practical tips for me to take back to my office and use on Monday morning. Very helpful information!" — Past PDI attendee

### How can PDI benefit law firm PD professionals?

Today's law firm PD professionals have more varied responsibilities than ever before. The demands for increased professional development and training, combined with industry trends and business realities, have added to the challenges faced by PD professionals. Whether it's managing the millennial workforce, implementing project management training, or developing a coaching program, the **2016 Professional Development Institute** will help you stay on top of the latest PD trends and techniques and give you access to a network of law firm PD professionals who are facing the same challenges.

> "Networking with other PD professionals and learning from what they are doing in their organizations is invaluable." —Past PDI attendee

### How can PDI benefit law school career professionals?

Law school career professionals must constantly look for ways to help make law students more employable in today's competitive job market. The **2016 Professional Development Institute** is an opportunity for you to hear directly from law firm professionals about the skills they are looking for in first-year associates and to learn about proven programs at other law schools. Law school attendees will also find significant value in sharing best practices, new ideas, and hot topics with other law student PD professionals.

> "As a law school attendee, I was able to get an inside view of what is happening in law firms as well as network and collaborate with other law school PD professionals." — Past PDI attendee

# How to Register

To register for the 2016 Professional Development Institute, go to www.nalp.org/events and select **2016 Professional Development Institute**. The system allows online registration and payment with a credit card or pay by check (select the latter if you plan to receive an invoice).

# Registration Rates

| Professional Development Institute | |
|---|---|
| $695 per person | Members of NALP, ALI CLE, and PDC |
| $815 per person | Non-Members |
| $475 per person | Registrants from public interest and government organizations |

| Pre-Conference Workshop: PD Management Foundations | |
|---|---|
| $75 per person | Attendees of the entire PDI and/or the PDC meeting |
| $150 per person | Attendees of the workshop only |

**Brand new PD books available at exclusive attendee price**

*Developing Talent: A Practical Guide*
Gaye Mara and Nora Mara, Editors

*Innovating Talent Management*
Terri Mottershead, General Editor

PDI exclusive pre-order discount: $65 each or $120 for both.

Place book order with registration. On-site pickup only.

## Hotel Reservation Procedure

Mandarin Oriental Hotel
1330 Maryland Avenue, SW
Washington, DC 20024
202-554-8588
www.mandarinoriental.com/washington

Attendees will make hotel reservations during the registration process. Hotel reservation confirmations will be sent directly from the Mandarin Oriental Hotel. Hotel rooms will not be reserved without a credit card.

- Register early. The room block tends to fill up quickly and once the block is full (or after the cutoff date of November 9, whichever comes first), hotel rooms are subject to availability.
- The sleeping room rate at the Mandarin Oriental Hotel is $275 (plus 14.5% tax) per night based on single or double occupancy.

## Cancellation Policy

- Full refund for cancellations received by November 3 minus a $100 cancellation fee.
- 50% refund for cancellations received November 4-11.
- No refunds after November 11.
- Hotel room cancellations must be made 72 hours prior to arrival or a charge equal to the first night's room and tax will result.

All programs and times are subject to change. Please check www.nalp.org/events for the most up to date conference schedule.

## Travel Discounts

For your convenience, Professional Service Firm Travel, LLC (PSFT) will be the official travel service for this event. PSFT will research the most economical route, airline, and flight times to help get you the lowest possible fare. PSFT has special contract airfares that are available to attendees of this meeting.

Professional Service Firm Travel, LLC
Phone: 212-592-1370 or 1-888-773-8728
Fax: 212-532-5776
www.psftravel.com
Email: lmelendez@psftravel.com or
jduberry@psftravel.com

PSFT reservation hours are Monday - Friday, 8:30 am - 6:00 pm ET. Make your reservations with Professional Service Firm Travel, LLC by calling 1-888-773-8728 and asking for Lissette or Jacqueline (please identify yourself as attending a NALP conference). A $35 transaction fee will be applied to all tickets purchased.

# Conference Agenda

| Wednesday, November 30 | |
|---|---|
| 3:30 pm – 6:30 pm | Pre-Conference Workshop:<br>Management Foundations for PD Professionals |

| Thursday, December 1 | |
|---|---|
| 8:00 – 9:30 am | Registration |
| 9:30 – 10:45 am | Plenary |
| 11:00 am – 12:15 pm | Concurrent Sessions |
| 12:15 – 1:15 pm | Networking Lunch |
| 1:30 – 2:45 pm | Concurrent Sessions |
| 3:00 – 4:15 pm | Concurrent Sessions |
| 4:15 – 5:30 pm | Networking Reception |

| Friday, December 2 | |
|---|---|
| 8:00 – 9:00 am | Registration |
| 9:00 – 10:15 am | Plenary |
| 10:30 am – 11:45 am | Concurrent Sessions |
| 11:45 am – 12:45 pm | Networking Lunch & Law School Member Roundtable |
| 12:45 – 2:00 pm | Concurrent Sessions |
| 2:15 – 3:30 pm | Concurrent Sessions |

**Professional Development Consortium (PDC) Winter Meeting**

Wednesday, November 30
9:00 AM - 5:00 PM

See www.pdclegal.org for details.

## Conference Sponsored by ALI CLE and NALP in collaboration with the Professional Development Consortium

**ALI CLE** is the premier national provider of continuing legal education in the United States, offering a comprehensive national curriculum of live courses, distance learning, and electronic and print publications. ALI CLE also assists law offices from coast to coast in providing professional development to their lawyers, including customized PD solutions, national conferences, online CLE content and materials, and other resources for advancing lawyer professional development.

**NALP** is an association of over 2,500 legal career professionals who advise law students, lawyers, law offices, and law schools in North America and beyond. NALP believes in fairness, facts, and the power of a diverse community. We work every day to be the best career services, recruitment, and professional development organization in the world because we want the lawyers and law students we serve to have an ethical recruiting system, employment data they can trust, and expert advisers to guide and support them in every stage of their careers.

The **Professional Development Consortium (PDC)** is a group of individuals working at law firms, government agencies, and corporations who are responsible for developing and administering training and continuing professional development for lawyers.

## CLE Credit

Virtually all ALI CLE programs are accredited in mandatory continuing legal education (MCLE) jurisdictions for varying numbers of credit hours. The Professional Development Institute is expected to qualify for CLE credit in jurisdictions that accredit live courses on law practice management. For specific information on CLE accreditation in your state, please email TeamMCLE@ali-cle.org.

## Private Coaching Sessions

One-on-one coaching is a highly effective form of training for lawyers and professionals seeking to improve their performance, advance their careers, and become more effective leaders. Donna Wannop, Coach and Consultant at the Leadership Research Institute, will provide individual coaching sessions during the 2016 PDI. Sign-up information will be available to registrants in advance of the conference.

# WEDNESDAY, November 30

## PRE-CONFERENCE WORKSHOP 3:30–6:30 PM

### Management Foundations for PD Professionals

This hands-on workshop gives newer PD professionals the fundamental skills and knowledge they need to get off to a great start and grow into their PD roles. Participants in this pre-conference workshop get valuable insights into the responsibilities of PD professionals, as well as helpful forms, templates, and resource lists. Topics covered include associate orientation and integration, training, MCLE compliance, core competencies, benchmarks, evaluations, and mentoring programs. Participants also have the opportunity to discuss current projects, successes, and challenges.

***Andrew Hales**, Sr. Director of Professional Development and Training, Venable LLP*

***Molly Peckman**, Principal, Molly Peckman Training & Development*

Whether you are newer to the PD field, assuming new PD responsibilities, or have a staff member in your office who could benefit from training, this optional workshop offers a wonderful opportunity to learn and build a network within the field.

"The Management Foundations for PD Professionals workshop was fantastic! The faculty were incredibly knowledgeable, and made what can easily be a dry subject both digestible and fun. I highly recommend the session to anyone wishing to acquire a better understanding of duties held by professional development practitioners." – Past Foundations Workshop attendee

***Separate registration fee required.***

# THURSDAY, December 1

### Registration 8:00–9:30 AM

Prepaid breakfast service available. Coffee service will be provided to all participants.

## PLENARY 9:30–10:45 AM

### Innovations That Inspire Action: Ideas for Talent Management from Outside the Legal Industry

It isn't a secret that innovation often occurs when existing ideas from one industry are applied to another. Learning about trends or new methods outside your field can give you fresh perspectives on your own challenges, and the legal industry is no exception. This plenary session will introduce you to innovations now being put to work in other industries for motivating, developing, and evaluating talent, and explore how law firms and law schools can benefit. Hear about the latest human capital trends outside the legal industry, discuss ways to apply them within your own organization, and get inspired to put your ideas into action.

***Dani Johnson**, Vice President of Learning & Development Research, Bersin by Deloitte, Deloitte LLP*

## CONCURRENT SESSIONS 11:00 AM–12:15 PM

### Group Coaching: A Cost-Effective Strategy to Leverage the Benefits of Coaching

Group coaching, blending the benefits of individual coaching and training, can bring high-impact results to large populations of lawyers. Particularly effective in such areas as business development, time and stress management, and leadership, it provides a forum where learning is applied and reinforced, challenges are discussed, best practices and ideas are shared, and members rely on group support. Group coaching adds cohort building, cross-fertilization, increased accountability, and ongoing sustainability, all of which can accelerate individual developmental goals and promote retention. Explore how to use group coaching in your organization and how to design and implement a program that benefits your target audience.

***Diane Costigan**, Partner, SJL Shannon LLC*

***Jessica Natkin**, Director, Attorney Career Development, Fenwick & West LLP*

***Jennifer Rakstad**, Career Development Advisor (US), Mayer Brown*

### Less Boring and More Effective: Using Modern Learning Techniques in Orientation and Onboarding Programs

Research shows that most of what's delivered in traditional orientation and onboarding programs is soon forgotten (and not to mention boring!). This session will demonstrate how leading companies take advantage of modern learning techniques such as quizzes, short videos, and the "flipped classroom" technique to design more innovative, engaging, and personalized onboarding and orientation programs. We'll also discuss lessons learned at Cooley and other organizations, including "before and after" feedback from associates who have been through programs with and without these modern techniques, and provide tips to help you create more compelling programs to better onboard students and lawyers.

***Larry Brown**, Senior Manager, Training & Professional Development, Wilson Sonsini Goodrich & Rosati*

***Ian Nelson**, Co-Founder, Hotshot*

***Erin Walczewski**, Manager of Professional Development, Cooley LLP*

***Chris Wedgeworth**, Co-Founder, Hotshot*

### Professional Development with a Diversity Purpose: Empowering Women of Color Lawyers and Law Students To Survive and Thrive

As the representation of women of color continues to decline across all levels at law firms, PD professionals should consider incorporating a key element into their programs and presentations – empowerment. Because unlike other populations, women of color lawyers and law students from underrepresented racial and ethnic groups are consciously aware of the additional barriers they face for success, providing skills training and other professional development through the lens of empowerment can continually inspire them as they grow professionally. This session will discuss the unique issues faced by women of color lawyers and law students and how to target development to meet their needs.

***Chasity Boyce,** Founder, Diverse Attorney Pipeline Program and Diversity & Inclusion Projects Manager, Skadden, Arps, Slate, Meagher & Flom LLP*

*Tiffany Harper*, *Founder, Diverse Attorney Pipeline Program and Associate Counsel, Grant Thornton LLP*

*Leslie Richards-Yellen*, *Chief Diversity and Inclusion Officer and Partner, Hinshaw & Culbertson LLP*

### The 3 R's: Recruiting, Retaining, and Recognizing Millennials

Development professionals are faced with the ongoing challenges of not only finding the right talent among millennials, but also, once found, figuring out how to nurture it in a way that garners millennials' commitment over compliance. This session will look holistically at best practices for recruiting and retaining talent, as well as thoughts on developing millennials through recognition and effective feedback. The presentation will take a systemic approach to talent management and provide tangible suggestions on what to do and how to do it.

*Chris DeSantis*, *Principal, CPDeSantis.com*

### What Got Them There Won't Keep Them There: Teaching Lawyers and Law Students How to be "INTRA-preneurs"

Intellect, long hours, and excellent work are a great starting point for a law firm associate. But as important as these skills and traits are, they're not everything an associate needs to "make it" at a firm, especially a firm with multiple offices. Other skills and tools are needed for an associate to become a successful, happy lawyer who looks forward to coming to work. These are INTRA-preneurial tools. This session will show you how to help associates think and act as INTRA-preneurs to give them more job satisfaction and better working relationships with their colleagues and firm clients.

*Elizabeth Foster-Nolan*, *Director of Professional Development, Goulston & Storrs*

*Calvin Gladney*, *Founder, Happier Better Lawyer*

### When Law Firms Squirm: Managing Associates and Summer Associates through Personal Crisis

Personal problems can make law firms squirm. Business is business, and personal problems are … well, how do they fit into law firm life? Lawyers and law students in their 20s and 30s struggle with a range of issues – personal and family illness, death and grief, addiction and other mental health issues, fertility and pregnancy problems. Most often, supervising lawyers care and want to help, but also have legitimate concerns about the impact on the team and client. Law firms offer little formal training in how to manage associates under normal circumstances, let alone during a crisis. This session will explore how law firm professionals can help their firms to bridge this gap, and how trusted advisors can help associates and summer associates avoid mistakes and lapses in judgment that may be more likely during the distraction of a personal crisis.

*Devin Glenn*, *Diversity & Inclusion Manager, Skadden Arps Slate Meagher & Flom LLP*

*Stacey Schwartz*, *Executive Coach/Facilitator, Schwartz Coaching and Consulting*

*Bess Sully*, *Chief Human Resources Officer, Sheppard Mullin*

*Jennifer Queen*, *Principal, J. Queen Consulting, LLC*

## Lunch 12:15–1:15 PM

This networking lunch is included in the registration fee.

## CONCURRENT SESSIONS 1:30–2:45 PM

### Keys to Success: Creating or Updating Your Professional Development Program

Formal professional development programming is part of the new normal in legal education. This presentation will bring together four schools with different approaches to providing PD training. We will outline the PD models developed at our schools, then quickly move on to answering your questions about creating and updating a PD program: What should you try to accomplish with a PD program? How do you get buy-in from faculty and administration? What incentives will encourage students to take advantage of voluntary programs and find value in mandatory programs? We will share what we have learned at our schools, and we hope you will bring ideas to share with the group.

*Rupa Bhandari*, *Assistant Dean for Student Services, University of California Hastings College of Law*

*Angela Cruseturner*, *Assistant Dean of Career Development, Baylor Law School*

*Francie Scott*, *Director of Professional Development and Associate Director of the Office of Career & Professional Development, Wake Forest University School of Law*

### So You Want To Hire a Coach. . . Take These Steps To Ensure ROI

Coaching seems to be everywhere these days. Are you starting to wonder whether and how to bring it into your organization? Whether your lawyers' needs are remedial or high potential, coaching is a powerful tool to help them meet their developmental goals. This session will explore best practices among the mechanics of engaging and partnering with coaches from start to finish, including how to introduce the idea of coaching to your lawyers; how to vet coaches for "fit"; how to structure each coaching package to ensure the right level of support; how to maximize your lawyers' "engagement" levels; and how to measure the effectiveness of each engagement. Make sure your valuable "PD spend" isn't wasted – take the right steps to ensure return on your investment.

*H. Sandra Bang*, *Global Director, Legal Talent Development, Shearman & Sterling LLP*

*Sang J. Lee*, *Chief Executive Officer, SJL Shannon LLC*

*Bess Sully*, *Chief Human Resources Officer, Sheppard Mullin Richter & Hampton, LLP*

### Strategic Talent Development Collaboration, Management, and Reporting

How do you know that your talent development programs and initiatives are aligned with your organization's strategic goals and are generating outcomes that support those goals? Just as importantly, how do you demonstrate such alignment to your managing partner or executive management team, highlight your department's impact on the success of your organization, and distinguish yourself as a strategic business partner? In this session, experienced legal talent management professionals and an expert in the field of corporate learning and development reporting will outline standards and best practices in strategic talent planning, managing, and reporting across industries, and give practical examples of how to meaningfully partner, plan, manage, and report on the results of your strategic talent development programs and initiatives.

***Heather Kelly**, Director of Attorney Development, Mintz Levin*

***Margaret Suender**, Sr. Director of Professional Development & Recruitment, Pepper Hamilton LLP*

***David Vance**, Executive Director, Center for Talent Reporting*

### Ten Hacks That Will Change Your Life! (Okay, Just Great PD Advice from PD Professionals)

In the world of PD, we dedicate ourselves to helping others realize their potential and we come across some great strategies for productivity and work-life balance in the process. In this session, professionals will share hacks they have learned to improve themselves, their roles, or their success in their roles. We'll look at what's a hack, what's just good sense, and what works in your workplace. The panel will also invite a conversation with the group on the hacks they use to manage workload, to increase personal brand or visibility, and to stay engaged, effective, and essential.

***Michele Bendekovic**, Director of Attorney Development and Diversity, Bass, Berry & Sims PLC*

***Devon Doane**, Professional Development Manager, Stradley Ronon Stevens & Young, LLP*

***Jennifer Gallinson**, Director of Attorney Recruitment & Development, Much Shelist PC*

***Kathleen Kerr**, Associate Director of Human Resources, Armstrong Teasdale, LLP*

### The Profitability of Gender Diversity and How to Become Diversity Champions

More companies now recognize the importance of gender diversity and inclusion. As service providers to those companies, law firms need to turn their internal initiatives into real action. This moderated discussion will focus on the profitability of greater gender diversity and inclusion, and the tools to achieve it. There is solid, exciting data on the enormous economic advantage that companies with a greater concentration of women at the top have over their more homogenous counterparts. Learn about the innovations and best practices companies are putting into practice and how law firms can derive value by using their gender diversity initiatives to drive recruitment, engagement, leadership training, and talent development.

***Sheryl Axelrod**, President and CEO, The Axelrod Firm, PC*

***Robyn Pollack**, Founder and Principal, Trellis Consulting LLC*

***Vanessa Snyder**, Associate Attorney, The Axelrod Firm, PC*

## CONCURRENT SESSIONS 3:00–4:15 PM

### Collaborate to Innovate: A Case Study about a Law Firm-Law School Program to Teach Business Strategy to Lawyers

To stay competitive in an ever tightening legal market, lawyers must deeply understand the business of their clients and deliver legal advice in a relevant business context. Yet key areas of business, such as marketing, strategy, financial literacy, and business analytics, have not been within the traditional purview of law schools (or law firms), and first year associates arrive knowing little about these topics. To address this issue, law firms have taken different approaches: from half-day programs on accounting for lawyers, to such programs as the immersive 10-day Fullbridge program, to Milbank@Harvard. In this session, we will present another approach – partnering with a top law and business school to brainstorm, design, and run an intensive modularized two-day program called "Thinking Like a Client: Business Strategy for Lawyers."

***Virginia Melvin**, Partner, Head of Legal Training, Mayer Brown LLP*

***Erin O'Brien**, Executive Director, NYU Law Institute for Executive Education*

### Path to Partnership: Increasing Transparency and Support for Your High Performers

Making partner in today's market requires more than just being a skilled practitioner. A lawyer's business case, political savvy, client relationship capital, and internal exposure now factor heavily in the mix. Not only is the path to partnership fraught with greater obstacles, but it is also obscured by a lack of clarity around the job description of a partner. Improving communication to associates throughout their career progression and providing targeted training, coaching, and other resources can help ensure that top candidates not only continue to strive for partnership, but also thrive when they make the transition into this new stage of their careers.

***Diane Costigan**, Partner, SJL Shannon LLC*

***Keya Dasgupta**, Learning & Development Director, Norton Rose Fulbright*

***Julia Mercier**, Director of Learning and Development, Norton Rose Fulbright*

### Project Management Training for Under $500

This "train the trainer" session will share budget-friendly strategies for building a firm-wide project management and alternative fee arrangement training program. Get concrete steps for learning and leveraging the best practices of your firm's most effective and productive teams; harnessing your firm's internal resources for monitoring time, costs, and deadlines; identifying your internal best practices for archiving work and lessons learned; and incorporating available research, tools, and templates at little or no cost. We'll also give you suggestions on preparing yourself or someone else inside your firm to be the trainer.

***Andrew Hales**, Sr. Director of Professional Development and Training, Venable LLP*

MCLE is available for this conference. Please see the registration desk for more information.

### Upward Reviews: Maximizing Their Power as a Development Tool

More and more organizations are turning to upward reviews as a development tool. What are upward reviews? What different ways can they be used? How do they work? What's involved in setting them up? Are there any downsides? And how effective are they? This session will answer these questions and more. Molly Peckman used upward reviews at her former firm for many years. Dr. Larry Richard has designed and implemented custom-tailored upward reviews for dozens of law firms. Together, they will walk you through the specifics and answer your questions.

***Molly Peckman**, Principal, Molly Peckman Training & Development*

***Larry Richard**, Founder & Principal Consultant, LawyerBrain LLC*

### Using Employee Engagement Research to Drive Results: Practical Tools for PD Professionals

Research suggests that there is a powerful link between employee engagement and the overall success of an organization. Highly engaged employees perform above expectations, are willing to stay longer and work harder, are often better received by clients, and can improve the overall financial success of the firm. In this highly interactive session, we will review the current, relevant research on employee engagement and discuss some of the ways that law firms can use these findings to create the kinds of conditions in which their lawyers reach their maximum potential and capabilities.

***Anne Brafford**, Co-Founder, Aspire*

***Milana Hogan**, Chief Legal Recruiting & Professional Development Officer, Sullivan & Cromwell LLP*

### Networking Reception — 4:15–5:30 PM

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## FRIDAY, December 2

### Drop in Mindfulness Meditation — 7:45–8:15 AM

Whether you are experienced or new to mindfulness, join Donna Branca and Diane Costigan for a guided mindfulness session. Come dressed relaxed or ready for the day.

### Registration — 8:00–9:00 AM

Prepaid breakfast service available. Coffee service will be provided to all participants.

## PLENARY — 9:00–10:15 AM

### Innovating Talent Management in Law Firms: What's New, What's Different, and What's Gone?

Are your talent management initiatives keeping pace with changes in the legal industry? This is the critical question for all TM professionals right now. We know much has changed – different workforces, workplaces, workspaces – so how are we identifying, meeting, and supporting these changes? In this facilitated and lively panel session, the presenters will draw on their extensive local and international experience to engage with the audience in identifying and discussing emerging best practices in innovating talent management in law firms. Topics covered will include the role of TM as a change agent; emerging best practices in developing the millennial generation of law firm and in-house leaders to be more innovative, collaborative, and able to adapt quickly to changing market forces; the importance of empirically based decision making; recruitment versus returnships; retention; the integral relationship between diversity and innovation; career development (mentoring versus sponsorship); employee engagement; baby boomer succession planning; and the role of executive education versus law school.

***Ida Abbott**, President, Ida Abbott Consulting LLC*

***Susan Manch**, Chief of People & Development, Norton Rose Fulbright US LLP*

***Terri Mottershead**, Principal, Mottershead Consulting*

***Scott Westfahl**, Professor of Practice and Faculty Director, Harvard Law School Executive Education*

## CONCURRENT SESSIONS — 10:30–11:45 AM

### Building Brand and Creating Preference

Building Brand begins with understanding the client's need to track and envision their experience with you long before they form any intention to hire you — as it is always easier for a client to hire you if you have built a Positive Presence (made it easy for prospective clients to observe you) in the marketplace, built Mindshare (developed client curiosity about your work), and Created Preference (helped the prospective client envision receiving value from you). In this training we set forth a practical framework for the individual attorney to build a Brand — an understanding of the investments and performance behaviors needed to build a Positive Presence, Mindshare, and Create Preference with sophisticated clients.

***Werten Bellamy**, President, Stakeholders, Inc.*

### I've Got Skills: How PD and Diversity Professionals Can Help Lawyers Enhance Their Interviewing Skills

Don't miss this chance to take your interviewers' skills to the next level. This interactive "train-the-trainer" session will share tips to help your interviewers quickly prepare for interviews and practical ways to consider their own bias and influence in questions. Learn effective interviewing techniques, with a particular emphasis on best practices in behavioral interviewing and creating awareness to eliminate unconscious bias. Get take-away strategies that you can impart to your interviewers to look past resumé commonalities to find out more about the candidates in relation to your organization.

***Jami de Lou**, Associate Director of Talent Development, Diversity & Inclusion, Jenner & Block*

### No More Random Acts of Training: Time to Take Your Curriculum to the Next Level!

Effective training programs for lawyers require more than just ordering lunch and having the usual suspects read the usual PowerPoints. The panel will discuss innovative programs like a Speakers' Society, a monthly extracurricular meeting during which associates practice presentations and give each other feedback in a "PFZ" (partner-free zone). Other programs to be discussed include "Everything You Need to Know about Leadership You Learned From Harry Potter," as well a new feedback initiative and the latest in simulated litigation trainings. Bring your own experiences to this session – participants will be encouraged to share their latest programs with the panel and each other.

***Michele Bendekovic**, Director of Attorney Development and Diversity, Bass, Berry & Sims PLC*

***Molly Peckman**, Principal, Molly Peckman Training & Development*

***Kaitlin Sullivan**, U.S.Attorney Training and Development Director, Dechert LLP*

***Joshua Troy**, Professional Development Manager, Blank Rome*

### Oh, Behave! Business Etiquette for Lawyers and Law Students

How can we teach business etiquette skills to maximize opportunities for lawyers and law students? This session will focus on proper communications skills (email, texting, telephone), social media do's and don'ts, socializing snafus, business card blunders, dining disasters, and the art of polite conversation. We will also discuss how to have those tough conversations with the Austin Powers in your professional life. You will leave this session with resources and tips to make you the business etiquette expert in your own organization.

***Leah Fisher**, Legal Professional Development Manager, Bryan Cave LLP*

***Donna Gerson**, Associate Dean, Career Strategies Office, Drexel University Thomas R. Kline School of Law*

### The Synergy of Mindfulness and Executive Coaching

Effective coaching tasks coaches with evoking a person's full potential. Doing so requires essential skills: active listening; suspending assumptions and judgments; clarifying and testing perspectives; and dissolving limitations by provoking deep reflection. To accomplish this, executive coaches, and those they coach, rely on their capacity to be completely present, maintain an open and clear mind, self-regulate attention, be responsive rather than reactive, and communicate effectively. This session will draw upon the hard and soft science of both coaching and mindfulness meditation and will provide simple, but powerful tools to take your coaching skills to the next level for greater results.

***Donna Branca**, Director, SJL Shannon*

***Sheri Zachary**, Director of Career Development and Inclusion, Saul Ewing LLP*

## Lunch 11:45 AM–12:45 PM

This networking lunch is included in the registration fee.

## Law School Member Roundtable 11:45 AM–12:45 PM

Join other law school members at a special luncheon to discuss new ideas and hot topics in law student PD.

## CONCURRENT SESSIONS 12:45–2:00 PM

### Experiential Training for New Government Lawyers: Useful Lessons for Law School PD Programs

More responsibility earlier. That's the skinny on a key advantage of government practice. Just how do new government lawyers get up to speed? Experiential training produces results sooner, leading to greater self-sufficiency. Our panel of experts, who design and deliver training for government lawyers, will share effective techniques and approaches that can be adapted for law school professional development programs. Come try out some hands-on exercises and get program ideas to meet students where they are and take them where they need to go. Your students will be ready for more responsibility earlier!

***Susan Fine**, Director of Professional Development, The George Washington University Law School*

***Johanna Leshner**, Director of Recruitment, Maryland Office of the Public Defender*

***Nancy Rider**, Training Coordinator, Division of Enforcement, U.S. Securities and Exchange Commission*

***David Zlotnick**, Attorney/Advisor & Training Coordinator, Federal Energy Regulatory Commission- Office of Enforcement*

### Inclusion Considerations for Effective Performance Management

Effective performance management is critical for developing and advancing associates, yet this process is often fraught with cultural biases and blindspots that can adversely impact some of our legal talent. How do we create more inclusive performance management practices and processes? This practical session will explore: the key forms of biases and blindspots that impact performance management; how to effectively deliver ongoing and formal feedback leveraging bci's OIRE feedback model; the important distinction between skills and behaviors; and strategies for creating more impactful feedback processes.

***Ritu Bhasin**, Founder & Principal, bhasin consulting inc.*

### Real World Partner Integration Successes and Failures: The First 90 Days

This session will provide front-line, real world (anonymous) anecdotes of lateral partner successes and failures during the crucial first 90 days. Based on the perspective of external and internal legal recruiters – who stay in close contact with lateral partners during the integration period and hear the unvarnished good, bad, and ugly – you will hear candid examples of where certain firms succeeded and failed on subtle, but important levels. You will walk away better informed about common blind spots and small steps that can have big impacts. Most importantly, you will learn how to use these first 90 days as a way to improve communication, teamwork, and business development efforts for both the lateral and existing partnership.

***Dan Binstock**, Partner, Co-Chair of Partner and Practice Group Division, Garrison & Sisson*

***Kate Ferguson**, Chief Recruiting Officer, King & Spalding*

### Train-the-Trainer: Preparing Your Evaluations Committee

As PD professionals, we're called on to help prepare lawyers to deliver feedback, as well as to deliver feedback to lawyers ourselves. This session is a primer on the basics for delivering effective feedback in a formal evaluations setting. The discussion will cover practical tips on the evaluations process, as well as how to help others prepare and deliver a feedback message that is constructive and leads to improvement. We will also address guidelines for giving feedback to poor performers, how to read nonverbal signs, and what to do in difficult or emotional situations. The session will also examine what types of feedback are appropriate in different situations, how to recognize and avoid bias, and how to frame feedback in a forward-looking light, using SMART goals and career development plans.

***Andrew Hales**, Sr. Director of Professional Development and Training, Venable LLP*

***Kelly Ryan**, Professional Development Coordinator, Venable LLP*

### We Created an Online Course (and So Can You!)

In 2016, the Illinois Supreme Court Commission on Professionalism produced its first on-demand e-learning course on intergenerational communication. The goal was to offer free access to online courses and demonstrate the future of e-learning – accessible, on-demand, and interactive. Now it's your turn. Are you on your own? Developing online learning for your organization? Convincing your school to try it out? If so, then this session is for you. We'll talk about how we built the course, then let you try out the course on your phone or laptop. Finally, you'll start on your own interactive program. We created an online course. So can you!

***Jacqueline Metler**, Owner, Developer, Independent Freelancer*

***Michelle Silverthorn**, Diversity and Education Director, Illinois Supreme Court Commission on Professionalism*

## CONCURRENT SESSIONS 2:15–3:30 PM

### Another Year of e-Learning: Lessons from the Trenches

At the 2015 PDI plenary, on 'Bite-Size Is the Right Size,' Kristin Heryford shared some of the lessons learned in her first year leading the eLearning initiative at Fenwick & West. Join us for Lessons Learned 2.0. In this session, we'll highlight vendors and platforms for all budgets, tips for creating and curating high quality content, and ways to leverage your internal talent and resources. We'll share what we learned about the importance of a strategic plan for any e-learning initiative. (Psst… we didn't really have one during Year One.) Save yourself and your organization some bumps and bruises by living vicariously through our year in the e-learning trenches.

***Kristin Heryford**, Manager of Professional Development, Fenwick & West LLP*

***Jeanne Picht**, Director, Attorney Talent Strategy, Fenwick & West LLP*

### Engaging and Leveraging Your Team through Situational Leadership®

Thirty-five years ago, Ken Blanchard co-authored *The One Minute Manager*, which quickly gained popularity and remained on the business bestseller list for decades. From the concept of people management, he developed the program and most widely taught leadership model in the world – Situational Leadership®. To be a leader others want to follow, managers need to set clear and attainable goals, provide the matching leadership style, and give appropriate feedback. The goal of Situational Leadership® is to help others develop competence, motivation, and confidence. This session, an introduction to the one-day+ workshop, will provide tips to boost your effectiveness, impact, and dedication as a people leader.

***Ruth Alexandor**, Director, DC Institute, dentalcorp*

***Lori Gauld**, Senior Manager, Learning Initiatives, Osler, Hoskin & Harcourt LLP*

### Speak the Language: Getting Well-being on the Curriculum

Lawyers and students are unhappy and depressed at alarming and escalating rates. The lawyer personality, coupled with an uncertain market and increasing client demands, create a perfect storm. The negative impact on recruitment, retention, engagement, and the bottom line is significant and undeniable, yet organizations aren't rushing to put well-being on the agenda. Budget constraints, stigma, and a culture that normalizes stress combine to create barriers to getting seats in the chairs. This session will provide you with tools and strategies to overcome resistance at all levels and provide a blueprint to designing, marketing, and running effective well-being programs.

***Joanne Schaefer**, Resilience Coach, JSchaefer Coaching*

### The Science of Storytelling

Storytelling in a corporate setting is known for its persuasive power. Why does it work and what can we learn from it to communicate more effectively? If you're working on a new project or initiative, you're likely looking to your colleagues for support. Ideally, you could present your ideas cohesively with a polished presentation, but that rarely happens. What if you had the storytelling tools to condense your large presentation to conversations during an elevator ride or a hallway run-in? Join us at this lively session and get the tools to articulate your ideas, whether you're presenting to a group of five or 500.

***Rachael Bosch**, Administrator, Talent Acquisition & Development, Paul Hastings*

***Meghan Dotter**, Principal, Portico PR*

### What's Next? How to Help Senior Lawyers Transition Out of Practice

Many senior partners don't know when or how to transition out of law practice. Fearful of losing their professional identity and unsure of what awaits them if they leave practice, many hold tightly to their clients and stay at work longer than they want or should, frustrating younger partners whose prospects for business growth, professional advancement, and leadership are blocked. Firms can prevent this situation by helping senior lawyers prepare to leave practice and enter their next stage with confidence and enthusiasm. This session will discuss how you and others at your organization can help lawyers make this important transition.

***Ida Abbott**, President, Ida Abbott Consulting LLC*

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Washington, DC 20036-2405

*From NALP, ALI CLE, and the PDC:*

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Professional Development Institute

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Plan now to be part of an event that will target and refine your lawyer professional development efforts. If you are responsible for any aspect of lawyer or law student training and professional development — whether for a law firm, corporation, government agency, or law school — attend the **2016 Professional Development Institute** to:

- Learn how to help your lawyers and law students thrive in the current environment;
- Explore successful practices with experts and leaders in the field; and
- Build invaluable connections with colleagues.

Training for you means greater professional development opportunities for your lawyers and law students. Get the latest information and practical skills to keep your professional development program one step ahead.

The acclaimed **PD Management Foundations** workshop will be offered as a pre-conference workshop in conjunction with the PDI. This intensive, three-hour workshop features comprehensive training specifically geared toward those newer to lawyer professional development. If you are new to the PD profession, or transitioning to a new role in your organization, you can't afford to miss the PD Management Foundations workshop!