Beyond “Next Slide”:
Building Effective, Hands-On Substantive Training Programs

Interactive Training Program Planning Worksheet

1) Assess Training Needs

Identify where interactive programming is needed.

- What feedback have you received from partners and associates regarding associates’ skills that are lacking?

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- Have clients expressed concerns about associates’ skills? If so, in what areas?

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- What existing training programs seek to develop these skills? What gaps exist?

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- What skills require hands-on learning (e.g., depositions, negotiations, client meetings)?

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2) Define the Training Program

- What are the primary learning outcomes for participants?

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- Who is your target audience?

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- How does this training align with firm competencies and business needs?

- What is the ideal format for this training (in-person, hybrid, virtual but interactive)?

- What interactive formats can be used to create learning outcomes (simulations, role-playing, flipped classrooms, feedback exercises)?

- Will this be a one-off program, or what follow-up coaching or reinforcement strategies will be used?

- Will this be a pilot program or a full-scale launch?

- What are other ways to potentially expand the ROI (expanded audience, external participants, summer associate participation, partnering with other departments, external recognition)?

3) Get Buy-In from Key Stakeholders

- Who are the key decision-makers that need to approve this program?

- Who can serve as internal champions to advocate for the program?

- What budget considerations need to be addressed?

- How can Business Development or Client Teams be involved in adding strategic value?

4) Develop the Program Agenda and Format

- How much time do you have?

- What interactive component(s) will be included?

- Do the attendees have the underlying knowledge for the interactive component, or how will the knowledge be delivered (virtual training, on-demand videos, articles, PLI)?

- How much time should be allocated for interactive component(s)?

- How will attendees receive feedback (by redline or verbally; individually or as a group), and how much time should be allocated to that feedback?

- What other components would be helpful to build skills?
    - Drills (i.e., shorter practice opportunities targeting a specific skill)
    - Peer practice and feedback (i.e., elevator pitches)
    - Faculty office hours

- What faculty members (partners, senior associates, external experts) should be involved?

- What materials are needed (case studies, deal documents, NITA materials, checklists, practice guides)?

- What participant expectations need to be set (pre-work, engagement, billable hour adjustments)?

5) Market the Program & Validate Impact

- How will the program be promoted internally?

- Will CLE credits be offered?

- How will faculty and internal contributors be recognized?

6) Evaluate and Refine the Training Program

- How will feedback be collected from participants?

- How will leadership evaluate skill improvements among participants?

- How will client impact be assessed?

- What steps can be taken to refine and expand the program over time?

Action Item

- Write down one argument you will use to convince leadership to approve an in-person training program.

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Interactive Training Program Checklist

1) Assess Training Needs

☑ Evaluate existing training programs – where do they succeed or fail?
☑ Identify skills that require hands-on learning (e.g., depositions, negotiations, client meetings)
☑ Gather input from associates, partners, and clients on training gaps
☑ Research what other firms are doing in similar practice areas
☑ Determine internal vs. external expertise needs

🔸 **Engagement Opportunity:** Discuss examples of ineffective virtual trainings

2) Define Your Training Objectives

☑ Identify the key skills attorneys should gain from the program
☑ Align training goals with firm benchmarks, competencies, and business needs
☑ Determine the ideal format (in-person, hybrid, virtual but interactive)
☑ Make the business case for interactive learning (associate development, retention, client satisfaction)

3) Design the Training Program

☑ Define practical skills attorneys will gain
☑ Select the best training format (simulations, role-playing, flipped classrooms, feedback exercises)
☑ Decide if the program will be a pilot or a full-scale launch
☑ Consider external participants (e.g., clients, in-house counsel) for added value
☑ Plan for follow-up coaching or reinforcement
☑ Address common objections:

- "It's too expensive." → Show cost-benefit analysis
- "Takes too much time." → Structure efficiently
- "A webinar will work." → Explain why passive learning is ineffective

🔸 **Engagement Opportunity:** Role-play objection handling

4) Get Buy-In from Key Stakeholders

☑ Engage leadership and practice group heads early in the process
☑ Leverage past participants and internal champions to advocate for the program
☑ Secure budget approval – evaluate internal vs. external costs
☑ Collaborate with Business Development & Client Teams to add strategic value

🔸 **Engagement Opportunity:** Share successful strategies for securing leadership approval

5) Develop the Program Agenda and Format

☑ Structure the program for maximum interactivity and engagement
☑ Consider:

- Live simulations (mock trials, depositions, deal closings)
- Flipped classrooms (assign pre-work before live sessions)
- Guided feedback exercises (real-time feedback from faculty)
- Cross-practice collaboration (mimicking interdisciplinary work)
  ☑ Identify faculty (partners, senior associates, external experts)
  ☑ Train faculty on effective facilitation techniques

6) Address Logistics & Materials

☑ Determine the target audience (associate year(s), practice group(s))
☑ Decide on program size and whether participation is mandatory or voluntary
☑ Develop training materials:

- Internal case studies, deal documents
- NITA materials, checklists, practice guides
- Panel presentations, interactive workshops
  ☑ Set clear expectations for participants (pre-work, engagement, billable hour adjustments)

7) Market the Program and Validate Impact

☑ Promote the program internally (intranet, LinkedIn, leadership meetings)
☑ Highlight CLE credit eligibility
☑ Recognize faculty and internal contributors

8) Evaluate & Refine the Training Program

☑ Collect feedback through post-program surveys and discussions
☑ Gather leadership feedback on observed skill improvements
☑ Assess client impact (i.e., did participants improve in client-facing interactions?)
☑ Explore opportunities to expand or adapt the training
☑ Continuously refine content based on participant feedback and evolving firm needs