



Overview of Managed Training Services



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Introduction

As technology continues to drive legal workflows, law firms face several challenges. How to stay abreast of the ongoing changes with existing training resources? How to target training to the changing workflows? How to increase access to the learning? And how to manage the continual influx of new joiners and also increase skills in the firm?

The Capensys *Managed Training Services (MTS)* offering addresses all of these challenges and provides the tools, services, and consulting to help firms adapt and excel.

Training Aligned with the Firm's Goals

Capensys Managed Training Services is an agile, subscription-based package. It is built on our strong foundation of remote learning tools and deeply experienced instructors. We use a blended strategy of on-demand remote and onsite training that is the outcome of careful analysis and review of your firm's unique training goals.

Capensys' subject matter experts and legal training professionals can work with you to create a flexible, relevant program to support your current training for onboarding, ongoing continuous performance improvement and security awareness training.

Why Change? Why Now?

As technology, workflows, and the workforce change, so should the training offering. The traditional method of training - with a trainer in front of a room - should be supplemented with online (self-service) and remote (hosted) training. Users can also search/find answers to their questions just-in-time (point of need).

Incorporating these alternative training/support options into a program will have a positive impact on the firm and its users. The firm trainers will be able to focus on practice-specific, higher-value initiatives; the firm can realize lower costs for the repetitive onboarding/ongoing activities. Users will benefit from a broader training offering that addresses diverse learning styles, and a clear roadmap to professional development.



A Full-Service Training Offering

The Capensys Managed Training Services blended offering helps support your training team. It will:

- Ensure that the onboarding and ongoing training programs meet the firm's goals.
- Provide in-person or remote new hire training for all offices.
- Reduce the overall cost of new hire onboarding and ongoing training.
- Improve assimilation of the firm information by new hires through phased learning.
- Free up firm resources from recurring onboarding and ongoing training.
- Allow firm training resources to focus on higher value-added services.
- Provide interactive, engaging online learning for most legal applications.
- Provide an online, searchable knowledgebase to supplement the Help Desk so users can find just-in-time answers to questions.
- Provide the firm with LTC4-aligned, industry-standard core competency learning plans (curriculum).
- Allow the firm to deliver targeted, workflow-based, blended training aligned with the different users workflows.
- Automate the managing, tracking, and reporting on the progress of firm users.

Why Capensys?

With our history of working with leading law firms to establish workflow-centered core competencies, Capensys is uniquely qualified to provide onboarding and ongoing training services to the firm attorneys and staff. Capensys and LTC4™ (a steering committee of leading law firms), established legal technology core competencies that cover the main workflows in law firms. The goal was to increase user adoption, raise skill levels and increase IT competency. Capensys produced corresponding online tutorials and evaluations called KnowledgeChecks to up-skill and certify users.



How the Program Will Take Shape

To ensure a smooth transition of responsibilities to the Capensys team, we propose a comprehensive project plan with the following phases.

Conduct a Knowledge Transfer Orientation

To ensure Capensys receives an in-depth understanding of the firm environment, application customizations, and culture, the firm will provide:

- A guided tour of the firm environment by firm experts.
- Ongoing remote access to the firm's training environment.

Review & Redesign the Training Program

Capensys will work with the internal subject matter expert (SME) team to review the current onboarding and ongoing training programs and design a blended offering that aligns with the firm goals and incorporates best practices.

- Interview existing trainers.
- Interview project stakeholders to identify desired goals and improvements.
- Review existing materials.
- Identify ideal balance of in-person and online learning.
- Automate training process with the LMS.

Target the Training to the Workflows

As technology continues to influence how attorneys and staff work, more targeted, relevant training is critical to adoption. Capensys will align the training sessions with the needs of the different user workflows.

- Review workflows of the primary user profiles.
- Align training topics and scenarios with workflows.

Build Out Training Infrastructure and Tools

An effective training program needs to provide training in several formats - instructor-led, self-service, and just-in-time. Capensys will work with the firm to automate the training process and incorporate learning tools into the program.

- **E-learning** - provide LTC4-aligned, workflow-based on-demand tutorials and knowledge checks.



- **QuickLearn** - offer a just-in-time, online, searchable knowledgebase of QRGs / videos.
- **Pathfinder** - allow attorneys to create tailored learning plans that align with their unique workflows.
- **Learnwise** - automate the managing, tracking, and reporting on the progress of firm users with a learning management system (LMS).

Conduct Onboarding Training

Capensys will conduct ongoing, recurring onboarding training to allow firm trainers to focus on higher value-added services.

- Provide a comprehensive review of firm's systems, applications and IT policies.
- Provide connection to IT/HR and lay groundwork for ongoing training program.

Conduct Ongoing Training

Capensys will conduct periodic proactive training sessions on the firm's existing application portfolio.

- Deliver ongoing skill-up training to new hires and legacy personnel.
- Manage and report on the progress of users towards firm-established goals.



The Training Team Principals

	<p>John M. Attinger – Director of Training and Security John is responsible for overseeing training and security projects. Prior to Capensys, John was the Technology Training Manager at Dewey & LeBoeuf LLP for 6 years. In this role, John managed a global staff of 7 trainers, oversaw training-related projects, managed an IT budget, incorporated new technologies and creative ideas into the training program, and designed a corporate online university. Previously, John worked at Orrick, Herrington & Sutcliffe LLP and O’Melveny & Myers LLP. John studied History (B.A.) at U.C. Berkeley, and Secondary Education (M.Ed.) at Teachers College, Columbia Univ.</p>
	<p>Cynthia Bradshaw – Training Manager Cynthia is a seasoned technology trainer with over 15 years of experience specializing in new hire training, software rollouts, application upgrades, continuing education, and customized goal-based training initiatives at all levels. Cynthia served as Assistant Vice President at Credit Suisse and developed the skills that later led to working with many of the top global investment banks and law firms. Cynthia studied Business Management (B.S.) at Hampton University.</p>
	<p>Janis Richman – Director of Consulting Services Janis has been working the legal industry as a training director, project manager, user interface designer, and technology consultant for over 25 years. She has expertise in business process review and analysis, user interface design and systems requirements, strategic planning for training and goal-based learning and performance techniques. She has designed, managed and trained matter-centric environments for iManage/ NetDocuments systems. Janis is a certified Life Mastery Coach.</p>
	<p>Judy Wiessner – Director of Product and User Support Judy has 28 years of law firm experience. Her career has focused on Customer Support and System Services as well as Project Management for numerous software and hardware rollouts. Judy was an early adopter of e-learning and introducing core skill requirements and developing skills assessment programs for secretaries to define training programs and foster productivity.</p>