

PLTG Meeting – February 13, 2009

Call to Order

Meeting called to order at 9:30 am by Carol Gerber. The meeting was held at the office of Fried, Frank, Harris, Shriver & Jacobson LLP.

Thanks to all who made this meeting possible.

Today we are testing a remote meeting in anticipation of members being unable to attend a meeting except via computer remote access.

Membership Renewal

Thanks to all who have already sent in checks. If you are not one of those persons, please forward your membership dues as soon as you can.

April Meeting

Greg Renza will return with the topic of technology in training. Featured will be Podcasts in training. Marsha Flowers will also be in attendance to update on Word Legal Users Group and their Legal Industry Document Standards initiative.

The April meeting will be on April 17th, a week later than usual, because of the holidays.

The May Meeting

The topic of the May meeting is Diversity and, specifically, how becoming aware of our own perspectives and biases can make us more effective trainers. **We are currently seeking a host for the May meeting.**

Treasurer's Report

Our current balance is \$9,207.68. This represents an \$800.00 increase over last month, which will be needed to pay for necessary website upgrades and to subsidize meeting costs that the firms decline to pick up.

In Memoriam

Barbara Bonnetti has passed away. She retired at the end of 2007 and shortly thereafter discovered she had terminal cancer. She died March 4, 2009.

Barbara was very active in the PLTG, was well known in this organization, and was a friend to many. She was remembered by Dennis Holly, Bea Marin, and Marilyn Hatcher people as a kind and considerate professional who was full of life and exuberance.

The group has donated \$100.00 in Barbara's name to CancerCare, a nationwide support group for Cancer patients and their caregivers. For more information, see www.cancercare.org.

Trainer Spotlight

This month's spotlight focused on what we can do to stay ahead of the economy or what can we do to assist our firms.

- The International Legal Technology Association's website, www.iltanet.org has a "Career Center" e-group that is available for posting resumes, job listings, hints, tips, and networking. You do not need to be an ILTA member to use the e-group.
- Several members gave examples of how they have proactively reached out to our users and our firms to show them the value of training. Coping with the new reality is difficult and as trainers we need to lead this change in philosophy and not wait for people to come to us.

Starting with the May meeting, the Trainer Spotlight segment will be available to vendors who want to let the PLTG members know about their products services. Please contact Roberta Gelb, your Vendor Rep, if you are interested in participating.

Meeting Topic: The Risk Management Approach to Training

Moderator: Helen Blumenthal

Speakers: Roseann Wingate of Seward & Kissel, Jeff Casper of Kirkland & Ellis, and Carol Gerber of Moses & Singer.

Each speaker presented their understanding of what is meant by "risk management" and how they use the approach in training. The speakers' materials are available on the PLTG site.

Roseann:

What is "Risk Management?"

Inconsistencies caused by various operators following the pre-existing setup of a document;

Meta-data that gets transmitted with the document through e-mail;

How do you use that approach in training?

Roseann created a document forensics course which teaches a person how to determine if your document is healthy. What can go wrong, what problems are in them. How to manage what users insert into Word documents.

Using real example documents from her firm's systems, Roseann tells people in training sessions what can happen if your document contains materials that are not acceptable to Microsoft Word. Roseann shows why a document will crash and how to prevent this from occurring. She talks about the dollar amount it takes to clean up a document, re-format a document or hide metadata, and what happens when the client finds detrimental metadata in your documents.

Roseann speaks to the fact that attorneys are not document production professionals, and that there are things the attorneys should allow those professionals to handle.

Jeff:

What is "Risk Management"?

By reference, included everything Roseann mentioned in her presentation.

We find that attorneys are working in their documents more today as they have computer experience since very early. This does not mean they understand the inner workings of Word.

How do you use that approach in training?

A course was designed for attorneys entitled Document Disaster Prevention. It covers the idea that preventing risk in documents includes more than metadata and encourages users to move from tabbing to using templates, styles, and other Word features to format documents.

The goal is individual and firm wide, because users have to see how will this affect collaboration.

Jeff uses real examples to show what can happen and how to prevent it from happening.

Carol:

What is "Risk Management?"

Word is the easiest place to use scare tactics, but we take a risk management approach to everything from potential violations of the attorney ethics rules, to the risks of speed typing on a BlackBerry.

How do you use this approach in training?

Couch this in the language and the approach with which the attorneys are familiar; pointing out risks and advising how to avoid them.

Being honest about the risks is the best way to command the attorneys' attention. When talking about specifics, use specific examples of other people's mistakes, as opposed to generalities about what could happen.

Discussion of attorney ethics rules and how to relate this to document risk.

The attorney's duty to protect clients' confidences and secrets means that we treat as metadata anything in a document that you may not know is there. Hidden text, hidden slides, comments, hidden versions. This also comes up often in e-mail. Carol has a list of things that can go wrong with e-mails. She handed out this list during the meeting.

Attorneys have a duty to act competently when representing their clients, to become competent quickly, or to involve someone else who is competent. We use that same concept to help the attorneys decide when they need to hand their documents over to a word processing professional.

Q&A:

How do you get the attorneys to attend training?

- Tie the orientation into best practices. Offer one-on-one training for the attorneys.
- Attend a departmental meeting of attorneys and introduce this idea.
- Use document production personnel to alert you to the needs of an attorney.

How can you get them to pay attention?

- Emphasize why it's important.
- Use economics as an example of the cost of document production to the client.
- Use follow-up sessions, one-on-one.
- Use risk management.

Closing Comments:

Thanks to Helen, Roseann and Jeff. Thanks to Fried, Frank for hosting.

Thanks to those who have already renewed their memberships.

See you at the next PLTG Meeting.