All Together Now: Maximizing PD in Today's Hybrid Firm

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We all know that working remotely and hybrid work schedules make our professional lives more challenging. *HR Executive Online* conducted a recent study to quantify the degree to which work-related problems increase when teams can't work in the same physical space. It's a lot higher than you might think. According to their research, there is a 243% increase in workplace-related problems when teams work remotely, including lack of trust, misrepresentation of data, and communication errors.

Given the reality of the new normal, many law firms and schools are worried about how continued hybrid and remote work will impact organizational culture and professional development. The challenges of the new workplace are interconnected, and creating cohesion and connection is required to develop the students and lawyers at our organizations effectively. Each of these challenges deserves to be addressed, but the focus of this article is on synchronous learning in a hybrid environment: something we all expect to face in this new reality.

Continued on page 30

Continued from page 29

The Challenges of Setting Up and Running Effective Hybrid Learning Programs

You may have noticed that training is most effective when everyone is in the same place — either 100% in-person or 100% virtual. Experts agree, based on research with firms, schools, and companies in North America and the UK. If you have days scheduled where everyone is in the same place, we recommend holding your learning programs on those days to ensure the same experience for all participants (and to ease the administrative burden). However, synchronization is not always possible or practical.

Many law firms have already been implementing hybrid learning programs for years. Programs in firms with multiple offices have often been held over video conference (often with audio dial-in options) with participants in many locations. The challenges of these programs — equal engagement and participation, equity of attention, basic logistics and CLE management, adequate staffing for moderators, and technology — have long been known by those coordinating hybrid learning. Despite the awareness of these issues, solutions have yet to be broadly implemented. The past two years have further grown the list of obstacles. "Zoom fatigue" and multitasking during webinars have increased exponentially. Logistics have been even more challenging to manage with remote participants, each in their own location instead of a manageable number of conference rooms. The "Great Resignation" has made effective learning programs even more important to recruit and retain the best possible lawyers.

You have likely already been doing hybrid training, and now you have the chance to do so with intention. Now is the time for the experts in learning (you!) to require more from these programs and take extra steps to ensure their success.

Planning Your Hybrid Program

What can be done to increase the effectiveness of synchronous learning in a hybrid environment? The good news is this — we already know what is needed for an effective program. All the same rules for live, in-person learning also apply in the hybrid environment. The challenge is doing all the things we regularly do to create effective programs, plus all the additional work needed for hybrid programs. While each suggestion below may apply to in-person programs, they are even more critical for hybrid programs.

Suggestion 1: Set Expectations

Setting proper expectations for an upcoming learning event is key to the success of any program. Participants should understand what they will be learning, why it is important, and what to expect during the course. In a hybrid environment, there are more details to cover. Be clear about any COVID-related policies or protocols for those attending in person. Provide details about the expected level of interaction (for both in-person and virtual attendees). Giving attendees a heads-up on whether cameras should be on or off and what amount of engagement from them is expected will ensure everyone arrives prepared to fully participate.

Suggestion 2: Enlist a Producer or Co-Host

While presenting, it is nearly impossible to equally engage with in-person and virtual participants. Presenters need to have another person assisting with unexpected technology issues, monitoring the chat, and focusing entirely on engaging with the virtual participants. This producer can also ensure everyone has the program materials, assign breakout rooms or field questions. Depending on your resources, the producer/co-host could be someone from your team, someone from A/V, or even a legal assistant or secretary who can assist in this manner.

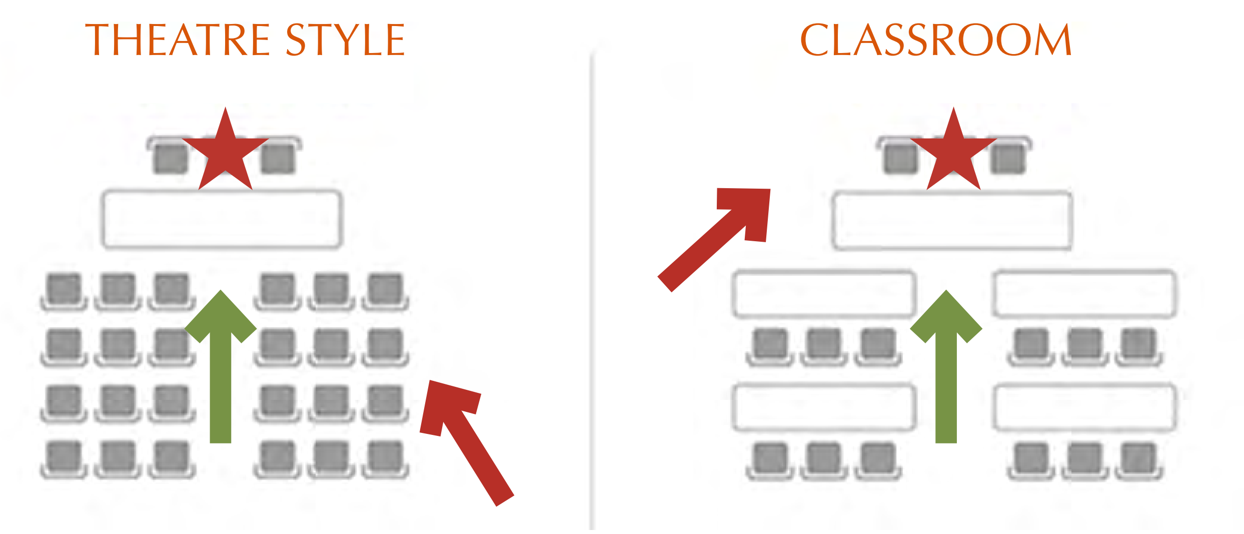
Continued on page 31

Continued from page 30

Suggestion 3: Figure Out Camera Placement

Unfortunately, many firms did not design their conference rooms with hybrid learning in mind. Cameras and camera angles were often an afterthought or intended for other uses. Most conference rooms have cameras mounted from the side as the projectors often are in the middle of the room (as shown with the red arrows in the images below). If this is your firm's setup, consider asking for a video camera and confidence monitor in the center aisle directly in front of the speaker(s), as shown in the images below with the green arrows.

Ideally, camera and confidence monitor placement should allow the speaker(s) to see the live audience and the virtual audience (camera) simultaneously.



Flashing a bunch of faces on a screen Brady Bunch-style next to the PowerPoint doesn't necessarily increase engagement.

If your training setup includes boardroom-style rooms, the same rule applies. Aim to have the speaker see the live and virtual audience simultaneously and make sure that the camera focuses only on the presenter. Make sure that cameras in other locations (live or remote) are not sound-activated so that someone opening a bag of chips — or telling their cat to get off their desk — won't suddenly show up as the presenter to all those attending (not that that's ever been known to happen!).

Suggestion 4: Think About Speaker Framing

Historically, many conference room cameras were fully zoomed out to show as much of the room as possible. However, a head-to-toe shot of a speaker is not helpful or engaging to virtual attendees, nor is it necessary. Instead, try to show slightly less than the top half of the body. Allowing everyone to see the presenter's face is crucial but avoid getting so close to the presenter's face that it would be uncomfortable in real life. When determining how tight to frame a speaker, think of the framing you see on the news or imagine sitting across a table from the speaker. Then ask yourself if the image from the camera gives a similar impression.

Suggestion 5: Consider the Question, "To See or Not Be Seen?"

There's a debate about whether in-person and remote audiences need to see each other. Some feel very strongly that every attendee needs to have a "square" in the virtual platform to ensure equity. Others feel that this practice increases Zoom fatigue and discourages those who want to participate from doing so because of background or dress. While there's nothing conclusive in the research, we don't believe that audiences need to see each other for most programs. Flashing a bunch of faces on a screen Brady Bunch-style next to the PowerPoint or putting a camera on the live audience doesn't necessarily increase

Continued on page 32

Continued from page 31

engagement. Whatever the decision may be for your program, consider the level of interaction between in-person and virtual attendees and your firm's culture. Also, be flexible — depending on the program, it may make sense to show everyone — or no one other than the speaker.

What is critical is that all audience members are able to see the speaker(s) and slides clearly. And most important, your audio should be crystal clear. If there is a blip in the video feed, the impact is minimal as long as the slides are visible and the audience can hear the speaker. If the audio goes out, it is much more likely to ruin the experience for the virtual audience.

Suggestion 6: Do a Dry Run/Tech Check

Dry runs or tech checks are helpful because they allow the speaker, staff, and producer to understand the program's needs and expectations in advance. Many planners hold dry runs to ensure speakers know how to log in and use the platform correctly but don't discuss critical details at this stage. Small details have a significant impact, so discuss all the preferred settings, course agenda and timing, and any interactive exercises. Planners often recognize tweaks to the platform settings or instructions that need to be provided during this piece of the planning process.

> **If participants aren't engaged, they won't learn the concepts.**

Taking time to practice a presentation is essential. While we all understand this need, it is often hard to get time with presenters (i.e., partners) to conduct a dry run. Even if the speakers are unavailable, staff and program planners should still hold this dry run.

Suggestion 7: Have a Contingency Plan

There's little to be done when the Internet connection is lost, or there's a disruption in a vendor's services, right? Wrong. Technology issues were one of the primary concerns noted when discussing hybrid learning challenges. This is always a significant concern because organizations don't have contingency plans in place.

A solid contingency plan includes backup connection details at the ready (for both audio and video) and a plan for transitioning to the new connections. There may be a delay, so provide your technology team with detailed instructions for each scenario (if the speaker is disconnected, if the video or audio goes out, etc.). At a minimum, create a script for the producer or co-host to make an announcement if needed to keep attendees aware of what's happening if (and when) something goes wrong.

Suggestion 8: Review Tech Tips for Hybrid Learning

The options on each technology platform differ, and ensuring each setting is correct for the program you envision can be challenging. Some of the most frequently adjusted settings are outlined below for consideration when planning synchronous hybrid learning.

- **Engaging With Entry/Closing Music:** Grab attendees' attention by playing music for five minutes before starting.
- **Camera and Audio On/Off on Entry:** Muting attendees upon entry helps minimize disruptions.
- **Chat Settings:** For meetings where everyone can participate (like with Zoom Meeting), we recommend that you allow participants to chat only with "EVERYONE" or "HOST & CO-HOST." Similarly, for webinars or programs where participants are not on camera or able to speak (like Zoom Webinar), you can minimize distractions by allowing attendees to chat with no one or with all panelists (including the host).
- **Polls:** Be sure to set up and test in advance.
- **Breakout Rooms:** Remember to set the "closing time" to your desired length. You don't have to accept the default "rooms close in 60 seconds." This is a great place to have your producer or co-host help you!
- **Reminders to Participants:** Don't forget that you can broadcast instructions and reminders to participants as needed throughout the program and in breakout rooms.

Encouraging Engagement

Engagement is the name of the game when it comes to learning — after all, if participants aren't engaged, they won't learn the concepts. We know that engagement is challenging in an all-virtual program, and only a little less so with in-person training, and the combination of the two is, predictably, a mashup of all the difficulties of engaging audiences. Here are several techniques to encourage engagement across modalities.

Continued on page 33

Continued from page 32

Technique 1: Create an Atmosphere of Psychological Safety

Psychological safety is being able to show and employ oneself without fear of negative consequences to self-image, status, or career. When people feel safe, they are more likely to participate, share experiences, ask questions, and be fully engaged in a discussion. Foster a sense of safety by discussing confidentiality and agreed-upon ground rules for the meeting or discussion. Be mindful of your organization's culture and implications for a candid conversation on various topics. Try to avoid putting people on the spot to share personal experiences. Phrase questions in a way that de-personalizes the issue, i.e., don't ask "Why don't you delegate?" and instead ask "Why don't lawyers delegate?"

Technique 2: Invite Early Login

Unlike in-person training programs, remote attendees are robbed of the casual banter that often occurs just before events. Traditional training where all the participants are in the room usually have a few minutes in which people are arriving and can say hello to each other before the meeting begins. It's essential to find ways to incorporate this concept into your hybrid events, too. Starting the program a few minutes after the hour can give people time to have a comfort break and move between rooms, but it also allows for this often-missed social element to happen virtually. Intentionally set aside a bit of social time, either at the beginning or at the end of the meeting, for participants to chat with each other.

Technique 3: Make It Easy

Getting the ball rolling early in the program is an effective way to foster engagement. Have an icebreaker question ready for attendees to chime in with answers in the chat or in their respective rooms to get the interactive juices flowing. Provide two different ways to communicate (one anonymous and one public) — but don't overdo it with 15 options. Choose the methods that are the easiest to utilize and require the least number of additional instructions.

Technique 4: Acknowledge Remote Attendees Early and Often

Set the stage for engaging remote attendees by regularly checking in with them, posing questions specific to that group, and ensuring that questions in the virtual platform are being noticed and answered. It's helpful to give participants a heads up before calling on virtual attendees to respond. For example, announce in advance when you plan to ask the virtual attendees to respond so they are prepared with cameras on and ready to unmute.

Technique 5: Reaffirm Expectations

Even when expectations are set in the program invitation, remind participants — regardless of where they are or how they are participating — what is expected from them at the start of the meeting.

Are you using the chat, and if so, for what? How will people submit questions? How should people indicate they wish to speak? Who will facilitate? If people are joining on a device, you can ask everyone to use the Raise Hand feature. Another option is for people to raise their actual hand or use both physical and virtual cues to ask to speak, particularly if not all remote participants are visible on camera. Ensure that the in-person attendees have a way to be heard across all modalities (or make sure questions are repeated, so everyone knows what's been asked). If more detailed instructions are necessary, post them in the chat and on a slide and explain verbally.

Technique 6: Give the Camera Ample Attention

Eye contact is highly emphasized in public speaking, but "camera contact" is the new way to connect and build rapport with our audiences. Think of the camera as one of the most important people in the room. Like a presidential debate — the live audience is great, but you might well have more people joining virtually, and you don't want them to feel like second-class citizens. Make a point of looking at the webcam, especially when you are speaking, to help make remote participants feel included.

Technique 7: Describe What's Happening in the Room

Describe what is happening in the room, especially if remote participants won't be able to see it. Even things that are irrelevant to the main business of the program (like someone fumbling around with cables to connect to the projector) should be explained so that remote participants don't feel left out. You may also need to repeat what is said in the room or say who is speaking if they are not on camera.

Be aware and mindful of what remote participants see. Even if everyone in the room is on camera, remote participants can't see where people are in relation to each other or other objects in the room. Non-verbal interactions between people or pointing to something in the room probably won't make sense to remote participants.

Continued on page 34

Continued from page 33

Elevating the Learning Experience by Building in Interaction

Numerous studies have shown that active participation in the learning process aids in the retention of knowledge. Having interactive components planned (for both in-person and virtual attendees) is key, but how can you ensure that you get it right?

Start by thinking through the goals of the program and matching the interactive components to the level of engagement necessary to facilitate those learning objectives. Different content lends itself to different types of interactivity, so it is important to match the type of interaction to the content of the program. Any activity or exercise should be communicated in advance to the students — especially if there are differences between the in-person and virtual experience. When introducing the activity, be sure to include an explanation of how it will benefit the learners.

It is important to leave time for exercises, Q&A, and unexpected exploration of the content. At a minimum, aim for using the 80/20 rule when building interactive components. That is, 80% of the time allotted for the program should be content, and 20% of the time should be devoted to activities. Depending on your topic, you may want to do a 1:3 or 2:3 ratio to help solidify complex concepts or to include personal reflection. As a bonus, busy lawyers and subject matter experts will embrace this rule as they can spend less time creating content. That means more time to devote to clients or work on other projects.

Start with the low-hanging fruit as you seek to elevate the learning experience through interactive components. While each method of interaction can be used in easy or complex ways, some activities are easier to implement and require minimal preparation. For those new to adding interactivity to learning programs, start small with easy-to-administer exercises and work your way up to more challenging types of interactions (some of which may require more trust and vulnerability). Using polls and the chat function are two examples that require minimal preparation work. Using more complex or advanced learning exercises and activities may require more planning and up-front legwork. Still, it can add extra motivation for learners to remain engaged in hybrid environments.

Here are two groups of activities based on their level of complexity:

Easier to Execute	More Advanced
Polls/Chats	Simulations/Role Plays
Small-Group Discussion	Flipped Classroom
Whiteboarding	Forced Debates
Hypotheticals/Case Studies	Gamification

Just Dive In

Given the reality we are all facing, creativity and a commitment to iterating through the process are vital to maximizing professional development in today's hybrid law firm. It can be hard to try something new, but this is the time for courage. Dive in, try something new, and take a chance. If you approach your learning programs with a new appreciation for the myriad of experiences you will be able to create, you are bound to learn something along the way and identify more ways to expand the impact of learning programs.

As Amy Poehler (actor, comedian, and author) once said, "Great people do things before they're ready. They do things before they know they can do it. Doing what you're afraid of, getting out of your comfort zone, taking risks — that is what life is. You might find out something about yourself that's really special." Sounds like a great invitation to try new things in your PD and take your hybrid training programs to new heights. ✚

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