Building a CLE Curriculum for Clients

By:
Donna M. Kramer
Sullivan & Cromwell, LLP
New York, New York

Presented at:
ACLEA 49th Annual Meeting
August 3-6, 2013
Baltimore, Maryland
Donna M. Kramer
Sullivan & Cromwell LLP
New York, NY

Donna M. Kramer is the Senior CLE Specialist at Sullivan & Cromwell LLP in New York. To prepare for her law firm career, Donna studied writing, film, and theatre, and worked as a jazz singer, copywriter, set designer, sound engineer, makeup artist, comedy writer, dancer, costume designer, bartender, club promoter, and radio DJ. Donna also spend one undignified summer mucking stalls at Belmont Racetrack, which experience has proved more relevant to her career in CLE than you might think.

In 1997, after 7 years as an S&C paralegal, Donna was drafted to puzzle out New York's CLE rules and has been somewhat obsessed with CLE ever since. In addition to her full-time CLE responsibilities, Donna has written, directed, and produced 18 live shows and 50+ videos. In her spare time, Donna is currently working on her hurricane-hammered house and spending way too much time on Facebook.
Building a CLE Curriculum for Clients
Donna Kramer, Sullivan & Cromwell LLP

In today’s competitive legal market, developing relationships with new clients and strengthening relationships with existing clients is crucial to the success of your organization, of your department, of your career.

It makes perfect sense that clients have come to expect CLE programs from their law firms. Why shouldn’t they? In New York (and in some other jurisdictions as well), law firm CLE providers are not permitted to charge clients for CLE programs, so clients are getting something for nothing. And it gives law firms an opportunity to establish their expertise, get some valuable face time, and potentially develop some new business in the process.

Where do client CLE topics come from?
Sometimes, clients approach law firms asking for training for their people on a specific topic. Sometimes, our lawyers get an idea for a topic they believe would be of interest to clients, so the content originates with them. But it raises our stock as CLE professionals if we can at least occasionally manage to get out ahead of the requests and contribute to the conversation about client CLE training topics.

Here are a few things my department – sometimes in connection with our Business Development Department - does to keep client training topics fresh and clients interested:

- **Read all about it:** Suggest new client training topics based upon your firm’s publications, the news, Supreme Court decisions, etc. If you don’t have time to do a lot of research, simply reading the headlines on your firm’s external publications page and on law.com will give you some great ideas about new programming.
- **Hold a revival:** Upon the completion of a particularly successful internal program, suggest presenters develop a client-appropriate version.
- **Bring it home:** When your in-house attorneys attend an external program you think might be of interest, ask them to develop a training based upon what they learned, supplemented with your firm’s own experience.
- **Reuse and recycle:** Schedule annual or biennial updates to popular client topics.
- **Nobody doesn’t like ethics:** Constantly be on the lookout for subjects that would qualify for ethics or other hard-to-get specialty credits.
- **Zoom out:** Suggest topics that would appeal to the widest possible range of clients. For example, employment law is something all companies’ legal departments need to be familiar with and employment topics also can be marketed to client’s (non-lawyer) upper management.
• **Zoom in:** Conversely, develop programs of specific interest to one industry, and make sure your firm invites not just existing clients but potential clients, too.

• **Auld Lang Syne:** Offer at least one program per year to your firm’s alums. Many of them will end up at some point working in clients’ legal departments, and it doesn’t hurt to strengthen your firm’s relationship with them, even if they’re currently working for the competition.

• **À la carte:** Work with practice group heads to develop a menu of ready-to-go topics from which clients can pick and choose. Relationship partners can then circulate the list to their clients and be able to deliver CLE with relatively little extra effort.

• **Survey says:** Periodically, poll your partners and senior associates to see whether they can suggest topics they think their clients would like to see.

• **Check out the competition:** There’s no shame in perusing the offerings listed on other firm and provider websites. When you’re planning a topic, it’s a good way to make sure your programming stands out from that available elsewhere.

• **Instant gratification:** Clients love on-demand CLE content. We keep a small but current library of online programs for alums and clients. This is the perfect solution to offer when you get the 4:30 PM Friday email saying their deadline is Monday and they need CLE credits.

• **Get it on film:** When partners come in from other offices to present internal CLE programs, I ask them to let me record a half-hour version of their presentation for our online university immediately after they’ve finished the longer in-house one. It’s only an extra hour or so of their time, there’s no audience, so the sound quality is better, and you get to present someone the clients may not have seen before.

• **Get a plus one:** While you may have no hand in crafting programs your lawyers are asked to present at other organizations, it can’t hurt to ask whether the provider will allow you a couple of free seats to the program, which seats you (or your partners) can offer to individual clients you know are interested in the topic or looking for CLE credits.

• **Introduce yourself:** My final tip is one that is meant to help you personally. Whenever possible, volunteer to attend your firm’s client programs. Wear a name tag, keep a supply of your business cards handy, and let clients know that if they have any questions, they’re welcome to call you. The more clients know your name, the more value your partners will put on you.