

CASE STUDY

Salans



Online communication and e-learning support a global transformation

Salans: A new approach delivers and manages a major training initiative

International law firm Salans has over 750 lawyers in 22 offices in 17 countries. The project brought together three best-of-breed systems to give users direct access to a comprehensive client database. The result was a firm-wide system that integrated information from business inception system LegalKey, billing system Elite and externally-sourced company information into the firm's InterAction CRM system.

According to CIO Marcel Henri, "The project was about bridging the gap between different information silos to create a single global source of client information accessed via InterAction. Fee earners can find out about a client's business and industry, the work we have done for them previously, which lawyers were involved and the billing details." The new system was rolled out across the firm's 22 global offices simultaneously and all users were trained to use it. Phoenix Business Solutions managed this successfully through a combination of online video communication, e-learning and on-site support.

CASE STUDY

E-learning enables Salans to deliver and manage a global training programme

The challenge: Managing a successful global roll-out

"We needed to ensure that users knew that they could access our global client database via Interaction and understood how to use the system," says Henri. "Another priority was to maintain accurate, up-to-date records."

Training had to cover two core activities: inputting information via LegalKey and accessing information via InterAction. Importantly, all users needed to be trained to use the system. E-learning was the obvious solution: to provide consistency across the firm and to train everyone simultaneously notwithstanding the firm's geographical spread.

Salans turned to Phoenix for its expertise and experience. "We have worked with Phoenix on e-learning materials to support other projects and we have confidence in their experience and ability to deliver."

The solution: Video messaging, e-learning and onsite training to maximise engagement

Henri worked with Phoenix on a communications and training programme designed to maximise user engagement and facilitate training.

A video of the global managing partner, the chief operating officer and the chief marketing officer, introducing the project and encouraging everyone to complete the e-learning modules, was sent to all users as a link in an email and was then posted on the firm's intranet.

The project team organised classroom sessions with support from local 'InterAction champions' who were trained to use the system so that each office had on-site troubleshooting support. The team visited the firm's seven largest offices. "We introduced the project and offered all users the opportunity to complete the e-learning programme."

Henri and his team worked with Phoenix to create an audio-enabled interactive e-learning programme. "The training focused on LegalKey for matter inception and InterAction for CRM," explains Henri. "We determined ten scenarios for each software package and developed interactive modules with a professional voiceover. People have to engage with the programme by clicking in the right place and typing on the screen."

The project was rolled out in conjunction with a firm-wide training portal in the form of a Learning Management System from e2train which included the ability to monitor participation in the e-learning programme and check whether users have completed all modules

The result: A consistent yet flexible approach to training delivery

Users in all offices and jurisdictions were offered consistent training and had the opportunity to get up to speed with the new system. Different offices could localise the materials. "We edited the programme by replacing the text in the bubbles and the sound file with content in the local language," explains Henri. "As a result of this and the ability to monitor completion of the e-learning programme, we can ensure that all users across the firm have a comparable knowledge of our systems."

Flexibility is another key factor. As e-learning is self-service training, users can complete the modules whenever it is convenient for them. It also allows for variation in the speed at which users learn the system and allows them to repeat and revise modules.

The new training portal also offers training on other systems and is particularly useful for induction training. "New joiners are required to complete particular training modules. The training portal enables us to monitor their progress and ensure that they complete the necessary training," explains Henri.

The e-learning project that supported the project was so successful that Henri is considering applying a similar approach to the firm's planned roll-out of Windows 7 and Office 2010.

According to Henri, "Phoenix has helped us develop a resource that can be applied to different software packages and upgrades across the business to support consistency and keep people up to date."

Why Phoenix?

- Leading provider of software solutions and IT consultancy for Professional Services Firms
- Innovative new products
- A team of experienced and highly qualified professionals

Phoenix and E-learning through Capensys

- Phoenix work with partners Capensys
- Goal Based Learning approach
- E-learning Content
- Innovative tools for help on demand
- Cost effective and successful projects

"We have worked with Phoenix on e-learning materials to support numerous projects and we have confidence in their experience and ability to deliver."

– **Marcel Henri, CIO, Salans**