

# Chapter 11

## Developing an E-Learning Course for a Global Legal Firm

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### **EXECUTIVE SUMMARY**

*Poor or nonexistent risk management processes can seriously impact law firms in many ways. Financial losses can be considerable, hard won reputations suffer, and in many cases key lawyers may have to separate from the firm. Risk management is particularly important in large, complex, multi—jurisdictional matters, which are the norm at global law firms such as Baker & McKenzie.*

*The Global Talent Management Team at Baker & McKenzie was tasked with designing and developing a training program around the existing Firmwide risk management approach. The approach has the objective of minimizing the Firm's practice and financial risk, and is based on ten core principles intended to provide guidance to our attorneys in managing some of the risk issues that they encounter in their daily practice. Developing an e-learning course, the core of this program, was envisioned to help achieve greater consistency in how the risk management approach is communicated internally, at the same time providing the Firm's lawyers with relevant information and resources at the right time.*

*In September 2008, The 10 Steps to Practical Risk Management interactive online course was launched globally within the Firm. The course was developed with guidance and subject matter expertise from the Firm's General Counsel and the Firm's Director of Professional Responsibility, and was developed by a team drawn from several geographies to help ensure global relevance. It identifies the principal sources of risk and potential liability, the ethical standards expected of all of the Firm's lawyers, and the importance of providing high quality client representation that complies with the Firm's ethical obligations wherever it practices in the world.*

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*In addition to exploring some of the practical risk issues that the Firm's lawyers encounter in daily practice, this course allows lawyers to apply their knowledge by reacting to short questions and case studies, explores the issues from the perspectives of clients, lawyers and the Firm, and directs lawyers through hyperlinks to important sources of information and guidance.*

*This case study describes the considerations, challenges, and lessons learned in developing this online course, which is the foundation of an overall risk management training program for the Firm. Risk management is a very broad, deep, and complex topic which impacts the practice of law in many different ways. Recognizing that it is in meaningful discussions where learning most likely takes place, the project team's challenge was to design an e-learning course that allows sufficient interactivity to engage the learner and stimulate thinking around issues they encounter in whatever legal area, and at whatever level they practice.*

## ORGANIZATION OR SITUATION BACKGROUND

From its inception in 1949 Baker & McKenzie has always aimed to be global in reach. There are 3,900 locally admitted attorneys in 67 offices worldwide, operating as collaborative equals guided by shared values and common standards. The Firm's strength and culture is based on deep local roots and the experienced global perspective that comes from helping companies navigate sophisticated legal and business issues at home and across borders, cultures and practices around the world. The Firm's structure is characterized by:

- **Geography:** The Firm operates in 39 countries across the four regions of Asia Pacific, Europe and Middle East, North America, and Latin America;
- **Practice Group:** The Firm has 11 core practice groups (i.e. groups of lawyers practicing in the same specialist legal expertise areas): Antitrust & Competition, Banking & Finance, Dispute Resolution, Employment, Intellectual Property, Mergers & Acquisitions, Private Equity, Real Estate, Securities, Tax, Trade & Commerce
- **Industry Group:** The Firm focuses on 4 industry sectors: Energy, Mining &

Infrastructure; Information Technology/  
Commercial; Pharmaceuticals &  
Healthcare.

Attorneys bring the knowledge, experiences and capabilities of a global law firm to domestic matters. The Firm's core brand idea is "*Fluency in the way we think, work and behave*", which means:

- having an instinctively global perspective and a deep understanding of the language and culture of business all over the world.
- having the ability to simplify legal complexity across practices and borders, bringing the right team and expertise regardless of location.
- having a genuinely multicultural approach and is passionate about open and highly collaborative relationships.

The Firm is best known for its global footprint, and assisting clients transact business across borders. While such matters are an excellent foundation for the Firm's continued growth, they inherently carry the greatest degree of risk. Therefore, in an organization that expects its attorneys to think globally, effective risk management has always been at the forefront of Firm management priorities.

It is axiomatic that key to any successful law firm is having a combination of both experienced

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