



Monday, April 30
11:00 am-12:30 pm

2003 Management Skill Development in an In-house Environment
Paralegal Track

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ACC – Paralegal University
Management Skill Development In
an In-house Environment

Barbara Perkins, Southwest Airlines Co.
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Management Skill Development In an In-
house Environment

- What do you consider to be the three most important skills for any manager?

Management Skill Development In an In-house Environment

- What do you consider to be the most difficult aspect of a management or leadership position? Most rewarding?

Management Skill Development In an In-house Environment

- If you assumed a management role from the ranks, what was the most difficult adjustment or change you faced?

Management Skill Development In an In-house Environment

- What do you wish you were told, before you assumed a management or leadership role?

Management Skill Development In an In-house Environment

- In your first role (or year) of management, what do you think you should have done more of, less of, differently?

BASIC MANAGEMENT SKILLS

- **Coaching/Feedback**
- **Project Management**
- **Leading Change**
- **Communication**
- **Critical Thinking/Problem Solving**
- **Time Management/ Priority Setting**
- **Business Literacy**
- **Financial Management**
- **Functional/Technical Knowledge**

BENCHMARKING LEADERSHIP WITH OTHER COMPANIES

- **Live the Values**
 - Do the right thing
 - Apply the Golden Rule
 - Take 100% Responsibility
 - Have Fun
 - Walk the Talk

- **Share the Vision**
 - Communicate Clearly
 - Articulate Corporate Strategy
 - Align Team goals with Strategy

- **Manage the Business**
 - Create Team Environment
 - Execute Results within Budget
 - Play by the Rules
 - Embrace Customer Covenant

- **Make Others Successful**
 - Practice Servant Leadership
 - Facilitate Individual Development
 - Be Accessible
 - Recognize and Reward Others

THE BASIC PRINCIPLES

- 1. Focus on the situation, issue, or behavior, not on the person.**
- 2. Maintain the self-confidence and self-esteem of others.**
- 3. Maintain constructive relationships with your Employees, peers, and Managers.**
- 4. Take initiative to make things better.**
- 5. Lead by example.**





LEADERSHIP EXPECTATIONS

Live the Southwest Way

♥ **Warrior Spirit**

Work Hard
Desire to be the best
Be courageous
Display a sense of urgency
Persevere
Innovate

♥ **Servant's Heart**

Follow The Golden Rule
Adhere to the Basic Principles
Treat others with respect
Put others first
Be egalitarian
Demonstrate proactive Customer Service
Embrace the SWA Family

♥ **Fun-LUVing Attitude**

Have FUN
Don't take yourself too seriously
Maintain perspective (balance)
Celebrate successes
Enjoy your work
Be a passionate Teamplayer

Develop People

Know your People
Set clear expectations
Communicate consistently
Delegate responsibility; hold
People accountable
Encourage strengths; address weaknesses
Provide timely, candid feedback
Build a bench

Build Great Teams

Identify the right People for the right job
Build and maintain trust among
Teammembers
Encourage vigorous debate and dialogue
Gain commitment to shared goals
Seek diversity
Always be on the lookout for great People

Think Strategically

See beyond today's activities
Act like an owner
Strive for continuous improvement
Understand the relationship between current
actions and future consequences
Embrace problem solving
Translate broad objectives into
specific action plans

Get Excellent Results

Focus on safety, low cost, and high
Customer Service delivery
Meet operational objectives
Complete projects ontime and on budget
Maintain a bias for action
Adhere to all internal controls
Demonstrate integrity in all actions

- Be honest
- Be ethical
- Be trustworthy

Leadership Attributes

- **Character** - Love for People; credibility; integrity; work ethic; trustworthy; egalitarianism; sense of humor; common sense; good judgment.
- **Courage** - Decisive; takes appropriate well-reasoned risks; champions ideas; takes initiative; manages conflict; manages risks; Warrior Spirit.
- **Competencies** - Understands functional area; technically competent; efficient; thorough; accurate; business sense; visionary; time management; sets priorities; thought Leadership; problem solver; innovative; strategic thinker; EPC participation; responsiveness; acts with urgency; results oriented.
- **Communication** - Timely; clear; concise; proficient written/oral; upstream reporting; presentation skills; provides feedback, direction, and information.
- **Culture** - Team player; optimistic/positive; friendly; approachable; open minded; coachable; accountable; follows basic principles; Golden Rule; inclusive; supportive; tactful; motivator.

QUALITIES OF AN EFFECTIVE LEADER

1. Have a genuine like for People. Show Patience, tolerance, respect and empathy.
2. Have respect for every job and the person doing it. Position and title alone signify nothing.
3. Work hard.
4. Pay attention to detail.
5. Have a sense of humor. Keep things in perspective.
6. Be approachable. Maintain an open door.
7. Be decisive.
8. Have excellent core values. And live them.
9. Value diversity.
10. Emphasize substance over form; results over activity.
11. Love problem solving.
12. Have foresight and the ability to adjust direction (not principles) based on circumstances.
13. Seek achievement and excellence - not money or happiness (they are a byproduct).

New Hire Checklist

Tasks for New Hire Intake Completion

DONE	Days OUT before hire date	Responsible Person	
	30	Leader	Computer Available
	10	Leader	Cube Assignment (see Admin Asst. to update floorplan)
	10	Leader	Obtain New Hire Packet from Admin Asst.
	5	Leader	E-mail "Systems Training", employee name, number, and routine ID
	5	Leader (HDQ Only)	Phone/Terminal - E-mail Admin Asst. with employee name, number, walker box#, phone model # and, ext. on phone
	5	Leader (DC Only)	Phone/Terminal - Voice mail, out calling, coverage path, modem line (complete CNSR)
	5	Leader	Fill out Resource Request Form on PMO Website
	5	Leader	E-mail LOGINID and SWA Helpdesk for Groupwise address and Logon/LAN ID. Include the Logon ID Form from Systems Security Website
	5	Leader	Include in e-mail to SWA Helpdesk to add the new hire to "group mailboxes" (ex: Systems ALL, Data Center, etc.)
	2	Leader	Work with Admin Asst. To obtain office supplies for their cube (in cabinet)
	2	Leader	Assign a Coheart (Mentor) for a week
	1	Leader & Team	Cube Decorations ("Welcome!", sign, gift box, etc.)
	0	Leader	Get new hire gift from Admin Asst.
	0	Leader	Take new hire to lunch first day (Ldr/Mgr/Dir-Team optional but only new hire expensed)
	0	Leader	Tour Department and introduce to Attorneys and Paralegals
	0	Leader	Send e-mail to welcome and introduce new hire
	0	Leader	E-mail SWA Comm. name, title, ext., and group name to be included in the Communications Directory
	0	Leader	Have employee complete the new hire information and feedback forms and return to Admin Asst. after 1st day
	0	Leader	E-mail existing appts (ex: staff mtgs, Qtrly. Lunch)
	5	Admin Asst.	Order name plate from building services
	2	Admin Asst.	Create mailbin
	0	Admin Asst.	Create employee folder
	0	Admin Asst.	New Hire notification from
	0	Admin Asst.	Place on payroll sheet
	0	Admin Asst.	Prepare attendance record
	0	Admin Asst.	Enroll in FLY for new hire celebration
	0	Admin Asst.	Update Organizational Chart

PARALEGAL
Interview Questions

1. Tell us why you are interested in this position.
2. Describe your current job responsibilities. What do you like the most/least?
3. What software applications are you familiar with? (Word, WordPerfect, ProLaw, Westlaw, Courtlink, Pacer, Excel).
4. What types of documents have you drafted? What types are most challenging, and why?
5. Tell us what you believe makes a successful Team. Tell us about a time you were part of a successful Team, & what made it a success? What was your role on the Team?
6. Tell us about a time a Coworker or Supervisor disagreed with your ideas or actions. How did you resolve the situation?
7. Tell us about a time when you had to make a tough decision without any direction or during the boss's absence. What did you do?
8. Tell us about your experience dealing with confidential material or information. Describe when you were approached or pushed to give information to someone and what you did.
9. Give us an example of a situation when you saw a problem and took action to correct it rather than wait for someone else.
10. How do you manage multiple priorities and deadlines? Describe a time you met scheduled deadlines while you were constantly interrupted. What about conflicting work demands? What were they and how did you respond?
11. This job involves interacting with people with different personalities and at different levels. Give us an example of where you've had to change your style to adapt to someone else's style.
12. All jobs have their frustrations and problems. Describe some specific tasks or conditions that have been frustrating to you.
13. Tell me about the manager/supervisor/team leader with whom you had the most effective relationship. Why was the relationship so effective? How do you like to be managed?
14. What are your expectations of your Leaders/Coworkers?

CAN I BE A MANAGER?

1. I HAVE NO DIFFICULTY HANDLING PRESSURE
2. I TAKE FULL RESPONSIBILITY FOR MY WORK
3. I CAN DELEGATE WORK TO OTHERS
4. I CAN PREPARE AND MANAGE A BUDGET
5. I CAN MAKE TOUGH DECISIONS
6. I AM WELL ORGANIZED
7. I PREFER WORKING WITH PEOPLE
8. I CAN GIVE CONSTRUCTIVE CRITICISM
9. I AM NOT AFRAID OF CONFRONTATION
10. I ENJOY SPEAKING IN FRONT OF GROUPS
11. I CAN SET OBJECTIVES AND MANAGE TO THEM
12. I UNDERSTAND THE PROFITABILITY GOALS OF THE ORGANIZATION
AND CAN MANAGE TOWARDS THEM
13. I CAN PREPARE HONEST AND CONSTRUCTIVE EVALUATIONS
14. I CAN GIVE A MESSAGE IN SUCH A WAY THAT THE RECIPIENT OF
THAT MESSAGE CAN HEAR IT
15. I CAN PROBLEM SOLVE
16. I CAN WORK HARD
17. I ENJOY LEADING TEAMS
18. I KNOW HOW TO READ FINANCIAL REPORTS
19. I CAN MOTIVATE PEOPLE
20. I HAVE A POSITIVE ATTITUDE ABOUT MY EMPLOYER AND MYSELF

Source: Renee Goldhammer

Supervisory Skills

- a. Awareness of basic human resources procedures/laws
- b. Recognition of the need to compensate employees fairly - financially and by acknowledgement of their scientific contributions
- c. Listening skills
- d. Advocacy skills
- e. Ability to explain goals, objectives, guidelines
- f. Sensitivity to different perspectives and cultures
- g. Knowledge of how to cope with and manage complicated personalities
- h. Ability to motivate staff
- i. Knowledge of how to conduct an interview
- j. Knowledge of how to run effective team meetings
- k. Knowledge of how to develop fair performance evaluations, including ongoing feedback
- l. Knowledge of conflict resolution
- m. Ability to write accurate and professional recommendation letters

Team Skills: Working as a team leader or as a part of a team is integral to being a valued manager or employee.

- a. Ability to work well with many different people/cultures
- b. Respect for and placing value on different perspectives
- c. Ability to provide and respond to constructive criticism
- d. Ability to work well under pressure and willingness to work hard
- e. Ability to apply oneself to a variety of tasks simultaneously
- f. Knowledge of how to work with the committee process

Source: The American Physiological Society
www.the-aps.org

Chairing a Committee

<http://www.the-aps.org/careers/careers1/pdfs/Being%20committee%20chair.pdf>

International Paralegal Management Association (IPMA) annual "Skills for New Managers" seminar
www.paralegalmanagement.org

TIPS FOR INEXPERIENCED MANAGERS

- ❖ Show Respect
 - Value experiences and knowledge of the staff
 - Communicate up and down, clearly communicating goals and asking for input from staff. Keep management informed of progress of goals, plans and problems.
- ❖ Develop employees
 - Aid in the development of additional skills and increased levels of responsibility.
 - Balance between personal responsibility for career and responsibility as a manager
- ❖ Accept Diversity
 - Social diversity and work experience diversity
- ❖ Communicate Effectively
 - Be prompt
 - To avoid unnecessary mistakes new managers should ask for input, listen to advice and concerns from experienced employees and take advantage of the available talents.
 - Listen and keep promises
- ❖ Give credit
- ❖ Delegate
- ❖ Learn from mistakes
- ❖ Solve problems
- ❖ Remember you will be tested
 - Don't dwell on differences or lower standards or alter performance in response to criticism