



Managing for Impact

A Management Development Series for Legal Managers

*To get great things done in today's legal firms, managers have to enable others to act.
Managers foster collaboration and trust.*

*They make it possible for others to do good work. They know that those who are expected to
produce the results must feel a sense of personal power and ownership.*

*Today's managers understand they must find a balance between the traditional command
and control techniques and modern philosophy of empowerment.*

*The goal is to give people what they need so they feel strong, capable and committed to
doing excellent work.*

Loeb Leadership Development Group, LLC is a management and leadership development company dedicated to cultivating high potentials in law firms. We provide expert training and leadership coaching services to all levels of leaders, delivering measurable results by combining training and coaching expertise with a passion that paves the way to success.

We do this by:

- Helping clients to build solid management skills and successful leadership practices.
- Collaborating with clients to understand their culture and build practical training and coaching methods to aid in the development of their current and future leaders.
- Inspiring all levels of leaders to utilize their capabilities and demonstrate leadership practices to move themselves, others and their firms towards success.
- Valuing diverse backgrounds, perspectives, opinions, thoughts, and experiences of clients to leverage each unique quality and bring innovative ideas to the firm.



Managing with Impact is a highly interactive development series dedicated to those responsible for supervising or managing others in the highly competitive world of legal firms. Whether managers have been “promoted from within” or transitioned into the legal industry to manage those who support demanding attorneys, it is the manager’s responsibility to build a collaborative team to support the needs of the lawyers and to align processes and people with the goals and initiatives of the firm.

This series provides managers with the non-negotiable skills required to be an effective law firm manager. It is a five course series. Each session runs from 9:00 am – 3:00 pm once a week for five consecutive weeks. (The facilitator remains until 4:00pm to offer any one on one attention requested by a participant) Skilled facilitators with a background of working with legal firms provide expert feedback and coaching as the participants gain confidence and the skills required to be an effective manager in today’s legal world. In addition, each group of participants become resources and support for each other as they experience the learning together.

After each session, participants return to the workplace eager to practice their newly acquired skills. Optional “homework” is provided to participants at the end of each session to provide an opportunity for managers to practice what they have learned in the session. At the following session, the facilitator debriefs any skills or techniques implemented by a manager along with key learnings from the experience. As participants return each week to share their experiences and to reflect on their learnings, intensive learning and development takes place.

Participants are also offered one complementary coaching session with a certified executive coach on the Loeb Leadership team. The managers are encouraged to use this 45-minute time slot any time during the series or up to three months upon completion of the series in order to help them solidify their learnings or talk through an individual situation.

What's really driving the boom in coaching, is this: as we move from 30 miles an hour to 70 to 120 to 180 . . . the whole game changes, and a lot of people are trying to keep up, learn how not to fall."

- John Kotter, Professor of Leadership, Harvard Business School

MANAGING WITH IMPACT for Legal Managers is offered live every spring and fall in New York City and Washington D.C. Investment for all five sessions including materials is \$3,500.00 per person. Breakfast and snacks are provided. Lunch is on own except for the final session when Loeb Leadership invites each participant to join the facilitator for a group lunch.

Location	Host Firm*	Location	Dates	Time
New York City	Proskauer Rose	11 Times Square New York, NY		9:00am – 3:00pm
Washington D.C.	Winston & Strawn	1700 K Street NW Washington D.C.		9:00 am – 3:00pm

*We are grateful and pleased to be hosted by Proskauer Rose in New York City and Winston & Strawn again this year. Thank you to all of the members of their team that help us to deliver a smoothly running series and beautiful locations in the center of New York City and Washington D.C. As an expression of our gratitude we are happy to provide a complementary seat in our award winning series to one your managers! Innovation and collaboration works!



Session 1 **Becoming the Boss**

“Congratulations” seems like the natural response when someone gets promoted to supervisor or manager. But study after study shows that, for many, taking on a management position at work is one of life’s most challenging and/or stressful events. The transition to formal or informal leader represents major changes in orientation of what people believe is important, how they allocate their time, and what aspects of the job they draw satisfaction from. This requires some degree of personal transformation if the new manager is to fully achieve results at his or her new level. **Becoming the Boss** is designed to help participants successfully transition from individual contributor to formal or informal leader.

As a result of participating in **Becoming the Boss** participants will:

- Build a vocabulary around the attributes of an effective manager/leader
- Understand the business case for managerial excellence
- Appreciate the challenges and opportunities in the transition process from an individual contributor to a manager
- Enhance capacity as a manager by understanding and building time management/prioritization, delegation and workforce engagement skills



Becoming the Boss Outline

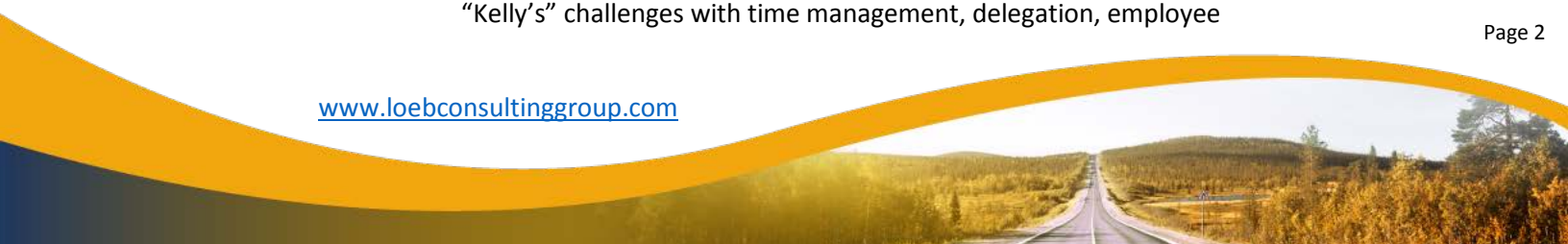
- I. **Introductions: Getting to Know One Another**

- II. **Setting Context for the Series**
 - a. Program Goals
 - b. Agenda
 - c. Group Norms
 - d. Participant expectations
 - i. What will be different after the five weeks?

- III. **Setting Context for the Day**
 - a. Description
 - b. Goals/Objectives

- IV. **Icebreaker: Embodying the Role of Manager**
 - a. Reflect on a great boss. What made him/her great? Impact on you/organization? What he/she more than a manager. A leader?
 - b. Based on these insights and your sense of what you/your organization expects as well as needs in its managers, what are the skills, behavioral attributes, values, roles and responsibilities that you believe you need to embody?

- V. **Case Study**
 - a. Participants review case study
 - i. Case Study highlights the differences between technical expert and manager; specifically, “Kelly’s” challenges with time management, delegation, employee





engagement/morale and employee life cycle issues. All of these topics are addressed in the series.

- b. In pairs, participants draft a” performance review for Kelly
- c. Group discussion – Skills, behaviors, attributes, values that a good manager must embody?

VI. Setting Context: What We Know from the Research

- a. Research results on management practices
- b. What resonates with you based on your role/experiences at your firm?

VII. Cementing Your Effectiveness from Day One with Everyone: Workforce Engagement

- a. Review Gallup Tenets on Workforce Engagement
- b. Participants complete an “assessment”
 - i. Importance to their job
 - ii. Their own opportunity for improvement
- c. Identify skills/attributes/responsibilities that are needed to support each Gallup tenet

VIII. Cementing Your Effectiveness from Day One: Time Management

- a. Introduction of Covey Priority Matrix
- b. In small groups, participants use previous case study to complete priority matrix
- c. Participants assess own alignment with priority matrix and explain what gets in their way
- d. HOMEWORK – Complete priority matrix for three days

IX. Cementing Your Effectiveness from Day One: Delegation

- a. Point/Counter Point Activity
 - i. Participants form two teams.
 - ii. One team is responsible for making all the possible arguments against delegation. The other team is responsible for making all the possible arguments for delegation.
 - iii. Group discussion about which of both arguments get most in manager’s way and why. What to do about it?
 - iv. HOMEWORK – Delegation challenge for next week. Delegate something new and also offer to take on something new from your boss.

X. Day One Summary

- a. Journaling - Each participant reflects and shares one take away and its potential impact on managerial effectiveness
- b. Review of Homework
 - i. Priority Matrix
 - ii. Delegation challenge
- c. Preview of Day 2
 - i. Inclusion
 - ii. DiSC Assessment and its implications





Session 2 Inclusive Management

Inclusive Management teaches participants how to understand and appreciate the styles of the people they work with. The result is more productive teams and working relationships. Using the Everything **DiSC® model**, a powerful yet easy-to-use, research-validated learning model, participants learn how to improve the quality of their workplaces by building solid working relationships, minimizing conflict and communicating more effectively. This workshop uses online pre-work and engaging facilitation with contemporary video to create a personalized learning experience. All participants are invited to join a complementary online dashboard storing their DiSC profiles for “just in time” use. The dashboard also provides additional tips and information on how to apply their learnings from the workshop.

As a result of participating in **Inclusive Management** participants will:

- Deepen understanding and appreciation for inclusive management knowledge, skills and behaviors
- Build self-awareness regarding strengths and opportunities for development in managing inclusively
- To discover the world of DiSC® and its relationship to managing
 - Introduction to the Everything DiSC® workplace map
 - Individual DiSC style with priorities, motivators and stressors
 - Similarities and differences amongst the DiSC® styles

Inclusive Management Outline

- I. **Welcome Back**
 - a. Homework Report Out
 - i. Half group reports out on learning from delegation assignment while other half reports out on learning from priority matrix homework
- II. **Setting Context for the Day**
 - a. Description
 - b. Goals/Objectives
 - c. Participant expectations
- III. **Am I an Inclusive Manager?**
 - a. Participants complete a brief self-assessment
 - b. Discuss “results” with partner and as a group
- IV. **DiSC: Setting Context**
 - a. Self -Awareness Quotes/Implications
 - b. Johari Window
 - c. How You See Yourself Exercise
- V. **DiSC: Introduction to Your Workplace Style**
 - a. Cornerstone Principles
 - b. Profile Overview and Reflection
 - i. Explanation of Dots/Priorities





- ii. Your Style
 - iii. Your Priorities
 - iv. Motivators and Stressors
 - c. Planning a Retreat – Strategic and Team Building Content
 - i. Interview Questions

- VI. **DiSC: Building More Effective Relationships**
 - a. Applying DiSC to Workplace Interactions
 - i. Video Vignettes
 - b. Increase Your Effectiveness
 - i. Report Information

- VII. **DiSC: People Reading**

- VIII. **DiSC, Your Style and Your Unique Role as Manager**
 - a. Consider your distinct responsibilities as a manager
 - b. Consider the culture and environment in which you work
 - c. Consider the “style profile” of your team
 - i. What opportunities exist to leverage your style
 - ii. What opportunities exist to flex your style
 - iii. What opportunities exist for others to leverage or flex their styles
 - iv. What is your plan
 - d. HOMEWORK
 - i. Inclusion Opportunity
 - ii. Identifying a staff member with whom you have a more challenging relationship. Assess through DiSC
 - iii. How does DiSC impact your relationship with your own boss?
 - iv. Bring in a job description for a position for which you recruit OR your own position

- IX. **Day Two Summary**
 - a. Journaling - Each participant shares one take away and its implications
 - b. Review of Homework
 - i. DiSC employee analysis
 - ii. DiSC Manager Analysis
 - a. Preview of Day 3
 - i. Selection and on-boarding



Session 3 Selection and On-Boarding

The cost of making a bad hire isn't simply the salary and benefits costs that were sunk into the new employee who ultimately didn't pan out. While the loss of salary, productivity, and poor morale are all clearly painful, another one of the biggest cost of a bad hire is the emotional energy and time spent by managers managing the poor performance of a bad hire. Dealing with underperformers is a drain on managers' mental capacity and has far-reaching implications for the performance of the firm. To avoid these scenarios, managers must understand the rationale for a strong selection process and consider their firm's selection strategy and how to support it. Using behavioral interviewing techniques during the interview process significantly improves a manager's chances of picking the right candidate two to five times over traditional processes. It focuses on *how* the candidate works rather than on skills, qualifications, and first impressions. Upon acceptance of an offer by the applicant, effective on boarding practices set the employee up for a smooth transition into the firm along with higher chances for increased workforce engagement.

As a result of participating in **Selection and On-Boarding** participants will:

- To develop deeper understanding for an effective selection process
- To identify the competencies and motivational issues that provide the content for behavioral based interviews
- To develop skills for behavioral based interviewing
 - Learn how to develop behavioral based interviewing questions
 - Learn the boundaries for a legal interview
 - Gain ideas for structuring and having a productive interview discussion
 - Learn techniques to probe for the right information
- To design a comprehensive and positive on boarding experience for new employees



Selection and On Boarding Outline

- I. **Welcome Back**
 - a. Homework Report Out
 - i. Learning
 - b. Icebreaker –
 - i. Most important messages to convey during interview and on-boarding process at YOUR firm
- II. **Setting Context for Rest of Series: Where We've Been, Where We Are Going**
 - a. How a manager shows up every day versus distinct "requirements" at different stages of employee life cycle
 - i. Roles/responsibilities
 - ii. Skills
 - iii. Behaviors/attributes
 - iv. Knowledge





- III. **Setting Context for the Day**
 - a. Description
 - i. Selection and On-boarding
 - b. Goals/Objectives
 - c. Participant expectations

 - IV. **Interview/Selection – The Why?**
 - a. Group Discussion: Rationale for a Solid Selection Process (e.g. Costs)
 - b. Rate Your Firm on its Selection Approach
 - i. Strategy
 - ii. Process
 - iii. Success

 - V. **Candidate Selection – The How?**
 - a. Big Picture:
 - i. Firm Strategy/Approach
 - ii. Interview Preparing, Conducting, Evaluating
 - b. Preparing
 - i. Group Brainstorm

 - VI. **Candidate Selection – The How?**
 - a. Conducting – General
 - i. Legal Question Quiz
 - ii. Best/worst interview questions – you’ve heard/experienced
 - iii. Different Types of Questions – Closed, Open, Situational, Behavioral

 - VII. **Behavioral Interviewing**
 - a. Overview
 - i. Premise
 - ii. “Selection” Problems it Addresses
 - b. Preparing for Behavioral Based Interview
 - i. Job Description Analysis and Competency Mapping
 - ii. Areas that Require Employee “Motivation”
 - iii. Developing Questions
 - c. Conducting the Interview
 - i. Asking behavioral based questions
 - 1. Looking for STAR responses
 - ii. Asking motivational fit questions
 - d. Evaluating the Candidate
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- VIII. **Skills Practice**
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- IX. **On Boarding (a.k.a – They’re hired, What’s next)**
 - a. Activity: New Country, What do you need to know?
 - b. Partner discussion





- c. Group debrief

- X. Brief Return to Tenets of Workforce Engagement**
 - a. First two tenets are all about the initial employee experience
 - i. Knowing what's expected of them.

- XI.** Having the materials and equipment to do their job.

- XII. Framework for On-Boarding**
 - a. Speaking the Language (e.g. firm culture)
 - b. Learning How Things Get Done (e.g. firm processes)
 - c. Hitting the Ground Running (job effectiveness/mastery)
 - d. Integrating into the Community (meeting people)

- XIII. Application Activity**
 - a. Individual work
 - i. Assess current on-boarding processes using framework
 - ii. What stays the same, what needs to be added, what is not as useful.
 - iii. What is your role as a manager in this process?
 - b. Group Discussion
 - c. Planning for Refined On-Boarding Strategy
 - i. Content
 - ii. Implementation

- IX. Day Three Summary**
 - a. Journaling - Each participant shares one take away and its implications
 - b. Review of **Homework**
 - i. Selection or on-boarding application opportunity
 - ii. Two employee profiles – high performer and challenging
 - c. Preview of Day 4 and 5
 - ii. Nuts and bolts managing/developing



Session 4 It's Ok, Essential to be the Boss

Once an employee has been selected and on boarded it is the manager's responsibility to provide the appropriate amount of coaching, feedback, support and guidance for the employee to succeed. For a number of reasons supported by an ever increasing body of research managing people is harder today than ever before. There are four generations of employees working side by side in today's workforce. There's no room for down time, waste, or inefficiency. Managers have to do more with less and some employees have become high maintenance. It's not unusual for employees to disagree openly and push back, and sometimes they won't very likely trust vague promises of long-term rewards. Today's managers have to be clear when setting expectations with employees, and must also be clear on what's expected of them in order to foster collaboration and trust. **It's Ok, Essential to be the Boss** reminds managers that employees rely on them to be successful, and in order for that to happen they need to be highly engaged with their employees through effective performance management techniques.

As a result of participating in **It's Ok, Essential to be the Boss** participants will:

- Develop a deeper understanding and appreciation for management essentials (and excellence) over the course of an employee's life cycle
- understand the importance to themselves, their employees, and their firm of being strong, highly engaged managers
- Recognize the consequences of under managing while challenging the assumptions of seven "management myths"
- Learn five back-to-basics techniques for helping their employees succeed
- Learn how to transition from performance manager to performance coach



I. Welcome Back

- a. Homework Report Out
 - i. Learning
- b. Icebreaker –
 - i. Job of managers/supervisors/leaders is to get stuff done and ensure that employees are **successful and satisfied** in getting things done
 - ii. How do your employees experience you on a day/day basis? Manager, developer, coach?
 - iii. How would you assess yourself?

II. Setting Context for the Day and Beyond

- a. Description
 - i. We've selected the employee
 - ii. We've on-boarded him/her
 - iii. Now we have to manage, coach, develop him/her
- b. Goals/Objectives
- c. Participant expectations

III. Manager Nuts and Bolts

- a. Consequences of Under Management
- b. Top 7 Management Myths
- c. Management is not One-Dimensional/Single note/One Size Fits All
 - i. Diversity in talent (e.g. skills, style, tenure, job responsibilities)



- ii. Stakes (optics/importance of project, manager roles/responsibilities, expectation of others)
 - d. Techniques
 - i. Managing Every Day
 - ii. Making Accountability a Process
 - iii. Making Expectations Clear
 - iv. Tracking performance
 - v. Solving small problems early
 - e. List of Great Manager Behaviors
- IV. **Managing Every Day**
 - a. Challenge/Opportunity
 - b. Return to Covey – Quadrant 2
 - c. 1:1 individual and team conversations
 - d. Knowledge/Behavior/attribute that gets in YOUR way
- V. **Making Expectations Clear**
 - a. Challenge/Opportunity
 - b. Exercise – Describing a New Task
 - c. The Expectation Mantra – Outcomes. Knowledge, Skills/Competencies, Process & Parameters
 - d. Return to Delegation
 - e. Knowledge/behavior/attribute that gets in YOUR way
- VI. **Solving Small Problems Early**
 - a. Challenge/Opportunity
 - b. Partner Discussion: Problems that snowball gets in YOUR way
 - c. Ways to Frame Problems
 - d. Knowledge/behavior/attribute that get
- VII. **Making Accountability a Process**
 - a. Challenge/Opportunity
 - b. Seven Complications
 - c. How to Hold People Accountable
 - d. Knowledge/behavior/attribute that gets in YOUR way
- VIII. **Tracking Performance**
 - a. Challenge/Opportunity
 - b. Ways to Monitor Performance
 - c. Knowledge/behavior/attribute that gets in YOUR way
- IX. **Question & Answer Activity using Frequently Asked Questions from New Managers**
- X. **Championing Performance (Part I)**
 - a. **The Performance Management Process**





- b. Benefits - Return to Engagement Principles. Some engagement principles are directly tied to effectively managing performance.
 - c. Self- Assessment
 - d. Year Long
 - i. Prior
 - ii. During
 - e. SMART Goals and Success Metrics
- XI. From Performance Manager to Coach**
- a. Distinctions
 - b. Benefits
 - i. Return to Engagement Principles. Some engagement principles are directly tied to development/coach.
 - c. Coaching Topics and Strategies
 - d. Individual Development Planning
- XII. Day Four Summary**
- a. Journaling - Each participant shares one take away and its implications
 - b. Review of **Homework**
 - i. Two employee profiles – high performer and challenging
 - ii. Reflection on Series
 - c. Preview of Day 5
 - i. Skills Practice
 - ii. Return to Where We Started



Session 5 **Championing Performance**

In order to develop performance and sustain motivation throughout the year managers must both manage and champion performance. Doing this consistently throughout the year leads to a productive and successful annual performance review with no surprises. Employees enter their performance review discussion with a growth mindset ready for an exchange of giving and receiving feedback along with sharing ideas for continued growth and development for the upcoming year. Championing performance teaches managers how to fluidly manage and coach performance to increase workforce engagement and deliver an effective annual performance review. Most importantly managers learn how to use effective communication skills helping to build relationships of trust, candor and mutual respect so employee performance is maximized.

At the close of the session, participants re-visit the case study introduced in the first session with a new set of “eyes” and share ideas on what they would do differently. A final exercise challenges each participant to list the attributes of how they would like to be described as a manager moving forward. Each list of words is collected by the facilitator and sent to Loeb Leadership headquarters so a “word cloud” can be created and delivered to each participant following the series. This visual is intended to keep each participant’s commitment visible every day!

As a result of participating in **Championing Performance** participants will:

- Learn how to both manage and champion performance
- Develop a deeper understanding for what it means to champion performance, including process and coaching considerations and their distinctions
- Learn how to prepare for and conduct an effective performance evaluation
- Practice handle “challenging” employee behaviors
- Learn techniques for on-going coaching and development planning throughout the year
- Crystalize the critical skills, behaviors, personality attributes and knowledge that support one to be a highly engaged and effective manager



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- I. **Welcome Back**
 - a. Icebreaker –
 - i. Job of managers/supervisors/leaders is to get stuff done and ensure that employees are **successful and satisfied** in getting things done
 - ii. How do your employees experience you on a day/day basis? Manager, developer, coach?
 - iii. How would you assess yourself?

 - II. **Setting Context for the Day and Beyond**
 - a. Description
 - i. Skills and Practice Makes Perfect
 - ii. Final Activity
 - b. Goals/Objectives
 - c. Participant expectations

 - III. **Skills for Success**
 - a. Listening





- b. Powerful questions
- c. Feedback

IV. Practice

V. Beware! Situations

VI. Return To Where We Started

- a. “Kelly” Revisited
- b. How Kelly spends her day tactically
- d. Skills/Attributes she demonstrates - Participants REWRITE the case study to reflect all their learning from series

VII. Day Five Summary

- a. Journaling - Each participant shares one take away and its implications
- b. **Embodying MY Role as Manager**
“Final” Word Cloud - Participants will come up with a final list of words based on learning. Loeb will re-produce in word clouds and send them to participants a week or so after the series ends.

Sample “Word Cloud”



- c. Wrap up and “Complementary Coaching” Reminder
 - i. Invitation to Loeb Leadership “Linked in” Group for continued support and resources

