

104.1 Managing expectations

of and interacting with clients, colleagues and support staff

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– From Star Trek III* –



Kirk: “How long to re-fit?”

Scotty: “Eight weeks. But you don’t have eight weeks, so I’ll do it for you in two.”

Kirk: “Do you always multiply your repair estimates by a factor of four?”

Scotty: “How else to maintain my reputation as a miracle worker?”

Kirk: “Your reputation is safe with me.”

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Why Can Be Difficult to Manage Expectations

- **Managers tend to keep all info “confidential”, occasionally even from the legal counsel**
- **Unreasonable expectations**
 - you are expected to magically solve problems (even if they are not related to legal issues)
- **Not clearly understood expectations**
 - e.g. What does “legal” mean? Does it include business practices?
- **Legal needs to facilitate legal objectives, but this may not be always possible**
- **Business considers legal operation non business-related, thus...any changing business circumstances usually not communicated, till it is too late!**

What Are Their Expectations?

- Shareholders ...
- Management team ...
- Employees ...
- Partners ...
- Customers ...
- And what about your expectations?

How Do We Successfully Manage Expectations?

- We need to ensure all involving parties have:
 - clearly set and well defined expectations
 - How was this expectation set?
 - Who set it?
 - When did you find out about it?
 - What have you done about it?
 - communicated when expectations cannot be met
- Try to share a common view of what is to be expected with people influencing your work &...
- Articulate, articulate, articulate...

Tips for Managing Expectations

1. Know your role

Why?

- provides starting point to negotiate & set expectations with colleagues/partners/customers

How can you do this?

- Understand each function of the role you will perform (job description)
- Define & document your role – Distribute to the company
- Comprehend that you are there in order to safeguard the company interests.
- Focus on your objectives

Tips for Managing Expectations (con'd)

2. Agree to roles and responsibilities

Why?

- ensures one has clear understanding of:
 - what one must do
 - what is expected of one
- sets realistic expectations
- ensures roles align with activities

What can you do?

- Explain where and how you can add value to each project and to which extent
- Be responsible
- Perform in accordance to your role

Tips for Managing Expectations (con'd)

3. Communicate/Articulate

Why?

- keeps organization informed on what you are doing & why
- helps to set others' expectations

What can you do?

- Develop a simple communications strategy
- Participate in business meetings
- Communicate your achievements and the lessons learned
- Use technology! (mobile phones, email, IM, intranets)
- Leave your door open

Tips for Managing Expectations (con'd)

4. Create team identity

“Team” with whom/what?

- Team within the legal department
- Team with people involved in specific projects

Why?

- a team player is always more efficient

What can you do?

- Be more involved with business issues
- Become familiar with your company’s products and the related business jargon
- Create an environment for sharing and receiving ideas
- Educate your team/colleagues => Create trust
- Ask for their opinion in specific cases – they might provide you with useful workarounds

Tips for Managing Expectations (con'd)

5. Be a better listener

Why?

- knowledge of each other's capabilities and weaknesses => creates understanding
- better communication

What can you do?

- Get them to realize importance of your contribution
- Listen to them (active listening)
- Discuss their doubts & uncertainties, as well as their goals to the possible extent
- Solicit & discuss their opinions – Try to understand what they mean
- Show them you care for the company and you are not the “business-prevention” department
- Visit clients work site (office, plant... whatever!)
- Go to informal meetings (lunch, parties, retreats etc.)
- Gather feedback (formal and informal client surveys)

Tips for Managing Expectations (con'd)

6. Be focused on company key activities

Why?

- it is the reason they hired an in-house lawyer, instead of the external counselor.

What can you do?

- Know the company goals
- Know the company sector within your local and/or international market
- Be familiar with the company's internal organization and personnel
- Read magazines and newspapers about both your company and competition
- Be business oriented

Tips for Managing Expectations (con'd)

7. Manage to plan

Why?

- Plan may include several milestones ⇒ help in establishing project expectations – provide feedback
- Delivering to plan = delivering to expectations

What can you do?

- Assist to the creation of an achievable project plan
- Don't over-commit
- Track to plan
- Report on the plan

Tips for Managing Expectations (con'd)

8. Foresee possible legal issues & act proactively

Why?

- keeps project progress in line with expectations
- no-one likes surprises that involve lawyers and courts
- Challenge your work
- Completely comprehend the project and its implications
- Everyone has a full picture; everyone knows what to expect

Tips for Managing Expectations (con'd)

8. Foresee possible legal issues & act proactively (con'd)

What can you do?

- **Be informed at all times by all Lines of Business**
- **Anticipate problems before they occur**
- **Bring together all resources who can solve problem**
- **Persuade all of the importance of escalating problems & agreeing on potential solutions**
- **'Better a good solution today, than a perfect one tomorrow'**
- **Attend your clients meetings**
- **Train your clients to identify/deal with simple legal issues**
- **Be involved in identification and management of legal risks**
- **Point out all implications (actual & possible) to the people who make the decisions**
- **Be there when they need to discuss issues**
- **Give estimates on legal matters and update them for reporting requirements**
- **Inform about costs before committing**

Tips for Managing Expectations (con'd)

9. Know when to say “No”

Why?

- Do we really have to explain “why”?

What can you do?

- You don't have to find legal “workarounds” to fix all business flaws – Business people have to be equally responsible (e.g. pay attention while drafting proposals, be careful with customer communication etc)
- Explain that you will do the best (given the circumstances); BUT you are not a jongleur nor a magician.
- Be specific and crystal clear when giving your legal advice or recommendation

Tips for Managing Expectations (con'd)

10. Recognize, reward & celebrate accomplishments

Why?

- It doesn't help in managing expectations per se, but it makes people feel good when they've met or exceeded expectations

What can you do?

- Publicly recognize accomplishment/assistance, e.g formation of "paralegal" team
- Include commendation in status reports
- Send e-mail to person & manager



Be prepared...

...To explore strange new worlds

To seek out new life and new civilizations

To boldly go where no lawyer has gone before!