



**Tuesday, May 1**  
**8:30–9:30 am**

## **2006 A Paralegal's Role as Business Partner** *Paralegal Track*

**Kim Gilbreath**  
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Savvis Inc.

**Joel M. Neuman**  
*Assistant General Counsel, FoodService*  
The Coca-Cola Company

**Jill Witter**  
*Former General Counsel - Forest Products Division*  
International Paper Company

### **Tips For A Paralegal As Business Partner**

- Know as much as possible about your client's business and industry, including objectives for the year; long term strategies and other issues driving business decisions, including risk tolerance; internal operating policies, rules and procedures; and the products or services it buys or sells.
- Ask lots of questions, read everything you can find and take advantage of training courses that teach you about the company and its products and services.
- Understand the "big picture" and associate yourself and your role with your company's core business. The better you know the business, the better you can serve your clients.
- Build and develop relationships with key business stakeholders and decision-makers. Figure out who does what and who knows what. Build institutional knowledge.
- Be the bridge that connects your business client with other parts of the organization. Help your clients spot legal versus business issues.
- Be your client's guide to the legal department.
- There is no substitute for being there; be with your clients as much as possible.
- Always respond quickly, even if it's only to let your clients know when they can expect an answer or your work product.
- Be precise in your requests for information from the clients to help you do your job. Identify and filter issues.
- Your goal is to avoid the word "no" and, instead, to provide the client with options that allows you to say "yes". Think creatively and communicate in a manner that explains the risks while offering good solutions and alternatives that support the company's objectives and goals.
- Avoid being a "nay-sayer". Make suggestions as to how an issue, provision or deal can be accomplished within the parameters established by the legal department, the company, and the law.
- Demonstrate how well you can develop options and a strategy for dealing with problems or issues.
- Don't force your clients to guess at your opinion; be clear, succinct, to the point and avoid legal jargon.

- Frame issues in business terms and explain the rationale for your opinion or decision in a way that relates to the business. It goes a long way toward being viewed as a business partner, rather than creating or fostering a “legal” vs. “business” mentality.
- There will be politics in your client’s organization, don’t get sucked in
- Be clear with the lawyers what types of decisions you can make independently and when the lawyer wants or needs to be consulted
- Act like a lawyer, but don’t forget that you are not a lawyer
- Demonstrate value: a “customer service” attitude, and planning and project management skills.
- Learn the reporting requirements for both your supervising attorney and the business client and establish communication channels that facilitate meeting those requirements.

**Panel Questions for A Paralegal's Role as Business Partner**

1. Describe how paralegals are used in your law department?
  - a. Are paralegals organizationally part of the legal division or a part of the business unit with which they work?
  - b. How are paralegals assigned work in your law department?
2. Why is it important for paralegals to be viewed as part of the business team?
  - a. Does it make a difference what area of practice the paralegal is in?
3. What training does a paralegal need in order to become an integral part of the business team?
4. How should a new paralegal go about trying to become part of the business team?
  - a. What help should they ask for from the lawyers with whom they work?
  - b. What are some of the best techniques for becoming, and maintaining, a role as a business partner?
  - c. What have you seen paralegals do that undermine their ability to become, or remain, a business partner?
  - d. Is there anything a paralegal that has a functional role (e.g. a litigation paralegal or a trademark paralegal) can do to become a business partner?
5. Are there any pitfalls a paralegal should be aware of as they become a "business partner?"
6. What type of ongoing communication should a paralegal maintain with the business team? With a supervising lawyer?

### **Tips For A Paralegal As Business Partner**

- 1) Know as much as possible about your client's business and industry, including objectives for the year, long term strategies, and other issues driving business decisions, including risk tolerance, and internal operating rules and regulations, policies and procedures, and the products or services it buys or sells.
- 2) Ask lots of questions, read everything you can find and take advantage of training courses that teach you about the company and its products and services.
- 3) Understand the "big picture" and associate yourself and your role with your company's core business. The better you know the business, the better you can serve your clients.
- 4) Build and develop relationships with key business stakeholders and decision-makers. Figure out who does what and who knows what. Build institutional knowledge.
- 5) Be the bridge that connects your business client with other parts of the organization. Help your clients spot legal versus business issues.
- 6) Be your client's guide to the legal department
- 7) There is no substitute for being there; be with your clients as much as possible
- 8) Always respond quickly, even if it's only to let your clients know when they can expect an answer or your work product
- 9) Be precise in your requests for information from the clients to help you do your job. Identify and filter issues.
- 10) Your goal is to avoid the word "no" and, instead, to provide the client with options that allows you to say "yes". Think creatively and proactively and communicate in a manner that explains the risks while offering good solutions and alternatives that support the company's objectives and goals.
- 11) Don't force your clients to guess at your opinion; always be clear, be succinct and to the point and avoid legal jargon. Frame issues in business terms or business realities. Take time to explain the rationale for your opinion or decision; it goes a long way toward being viewed as a united team, rather than creating or fostering a "legal" vs. business mentality.

- 12) Demonstrate how well you can develop options and a strategy for dealing with problems or issues.
- 13) Demonstrate value: a “customer service” attitude, planning and project management skills
- 14) Be an expert in your own documents; not understanding the documents you put in front of a client is a sure way to lose their trust
- 15) Don't pigeonhole yourself into a particular area; if a client calls and asks for help in solving a problem, make sure to help them, even if it means getting them to another person in the legal department who can help them solve the problem
- 16) Be clear with the lawyers what types of decisions you can make independently and when the lawyer wants or needs to be consulted
- 17) Learn the reporting requirements for both your supervising attorney and the business partner and establish communication channels that facilitate meeting those requirements.
- 18) There will be politics in your client's organization, don't get sucked in
- 19) Act like a lawyer, but don't forget that you are not a lawyer

May 1, 2007

Prepared by:

Jill Witter	Attorney at Law
Kim Gilbreath	Savvis, Inc.
Joel Neuman	The Coca-Cola Company



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ACC's 5th Annual Corporate Counsel University: New Challenges/New Solutions

April 29-May 1, Hyatt Regency St. Louis at Union Station



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