



Monday, April 30
8:30-9:30 am

**2001 Professional Development for the In-house
Paralegal**
Paralegal Track

Kenneth E. Bunge
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United Technologies Corporation

Brian Haberly
Senior Paralegal, Corporate & Securities Group
Starbucks Coffee Company

<u>Tier/Title</u>	<u>Qualifications</u>	<u>Description</u>	<u>Core Competency</u>
Legal Project Assistant (Non-Exempt)	<p><u>Academic/Work History:</u> Minimum of a High School Degree or GED plus 1+ years of related experience.</p> <p><u>Skills:</u> Knowledge of related principles and terminology. Organizational and detailed-oriented skills are required.</p>	<p>Assist Attorneys, Paralegals, and/or Administrative staff in the day to day operation of the department, including administrative responsibilities.</p> <p>Work under the supervision of an attorney or paralegal and perform various tasks specific to the assignment.</p>	

<u>Tier/Title</u>	<u>Qualifications</u>	<u>Description</u>	<u>Core Competency</u>
Tier One/Paralegal	<p><u>Academic/Work History</u> Bachelors Degree from an accredited institution in a related field of study preferred and 0 to 2+ years of experience;</p> <p>And/Or</p> <p>Associates Degree from an accredited institution in a related field of study and 2 to 4+ years of experience</p> <p>And/Or</p> <p>Paralegal Certificate from an ABA approved paralegal training program or equivalent with a minimum of 18 credit hours of legal specialty classes and 3 ½ + years of experience.</p> <p><u>Skills:</u> Knowledge of legal terminology, principles, and documents.</p> <p>Ability to examine, review and prepare legal documents and correspondence, and conduct legal and factual research.</p> <p>Organizational, communication, analytical, and detailed-oriented skills are required.</p>	<p>Assist Attorneys and/or Paralegal staff.</p> <p>Work under the supervision of an attorney or Senior Paralegal and perform various tasks including but not limited to document numbering and organization, government filings, drafting legal correspondence, agreements, legal documents, and other projects that require knowledge of the transactions or legal matters involved.</p>	

<u>Tier/Title</u>	<u>Qualifications</u>	<u>Description</u>	<u>Core Competency</u>
Tier Two/Senior Paralegal	<p><u>Academic/Work History:</u> Bachelor degree from an accredited institution in a related field of study preferred and 4+ years of experience;</p> <p>And/Or</p> <p>Associates Degree from an accredited institution in a related field of study and 6+ years of experience</p> <p><u>Skills:</u> Specialized legal knowledge required.</p> <p>Ability to assist attorneys in complex legal matters.</p> <p>Strong analytical skills.</p> <p>Ability to examine, review, evaluate and prepare complex legal documents and correspondence.</p> <p>Excellent interpersonal skills. Ability to conduct legal and factual research and perform document acquisition, organization, review, analysis, and summary.</p> <p>Strong oral and written communication skills.</p>	<p>Responsibilities include but not limited to:</p> <ul style="list-style-type: none"> • factual and legal research • document analysis • drafting transactional documents • coordinating document productions • conducting or assisting in investigations, • handling other substantive legal tasks with minimal supervision by an attorney, and • communication with third parties including outside counsel and customers 	

<u>Tier/Title</u>	<u>Qualifications</u>	<u>Description</u>	<u>Core Competency</u>
Tier Three/Paralegal Manager/Specialist	<p><u>Academic/Work History:</u> Masters degree from an accredited institution in a related field of study plus 6+ years of related experience;</p> <p>And/Or</p> <p>Bachelor's degree from an accredited institution in a related field of study and 10+ years of experience.</p> <p><u>Skills:</u> Expertise in legal subject area. Ability to perform substantive paralegal duties at a high level.</p> <p>Extensive knowledge of complex legal principles, concepts, and methodology of legal research and analysis and the ability to apply this knowledge in the interpretation of applicable laws and precedent.</p> <p>Excellent interpersonal skills.</p> <p>Ability to work independently.</p> <p>Excellent oral and written communication skills.</p> <p>Excellent problem solving abilities.</p> <p>Excellent analytical skills.</p> <p>Some supervisory experience preferred.</p>	<p>Responsibilities include but are not limited to:</p> <ul style="list-style-type: none"> • an advanced level of expertise in a practice area, • assisting attorneys in complex legal matters, • exercise significant independent judgement, • conduct training and coordinate assignments and activities, • lead or supervise paralegals and legal project assistants, • lead or supervise higher level/specialized legal projects, • manage paralegal staff 	

Training Roadmap for IP Paralegal L8 – L6)

GENERAL SUBJECT

S P E C I F I C S U B J E C T S

(List Specific Training Providers/Courses in Parenthesis)

	INTRODUCTORY	INTERMEDIATE	ADVANCED
General Business Acumen (e.g. accounting, finance, etc.)			<u>Business Decision Making:</u> <ul style="list-style-type: none"> Strategic decision-making Possibility thinking (Various UTC training)
	INTRODUCTORY	INTERMEDIATE	ADVANCED
UTC/Pratt & Whitney-Specific (e.g., products, services, markets, strategies, policies, procedures, ACE/processes)	<u>Continuous Improvement:</u> <ul style="list-style-type: none"> Overview of concepts/tools (e.g., QCPC; Root Cause, 6S) <u>Products/Services:</u> <ul style="list-style-type: none"> Overview of gas turbine engines Basic Overview of P&W business segments (LCE, MME, SME, PWC, PWPS, SMS, Space), their products, services, markets, and competition. (Dep't Library Resources, Jet Engine Familiarization Course)	<u>UTC/P&W Policies & Procedures:</u> <ul style="list-style-type: none"> Acquisitions, Divestitures, Joint Ventures, Mergers & Equity Interests Approval and Signature Authority (UTC and P&W) Communications w/ Gov't Authorities Conflict of Interest Corporate Communications Corporate Identity Record Retention (UTC/P&W Websites)	<u>Policies/Procedures:</u> <ul style="list-style-type: none"> Human Resources/Benefits/Supervisory-Related Independent Contractors, Leased Employees, Former Employees (UTC/P&W Websites)
	INTRODUCTORY	INTERMEDIATE	ADVANCED
Profession & Field of Expertise	<u>Copyrights:</u> <ul style="list-style-type: none"> Overview <u>Government Contracts:</u> <ul style="list-style-type: none"> Overview of applicable laws/doctrines IP rights and USG funded work – (PLI; dep't resources – Cini/Day training materials) <u>Intellectual Property (general) – see also Patents, Trade Secrets, Copyrights, Trademarks:</u> <ul style="list-style-type: none"> Overview of Types of IP and applicable laws, regulations; (BPEC; Dep't Library Resources; PLI)	<u>Copyright:</u> <ul style="list-style-type: none"> Preparation of applications for Registration <u>Export/Import:</u> <ul style="list-style-type: none"> Overview of applicable laws (e.g., BIS, ITAR) <u>Intellectual Property (general) – see also Patents, Trade Secrets, Copyrights, Trademarks:</u> <ul style="list-style-type: none"> Basics of Licensing (e.g., of Patents, Trade Secrets) (BPEC; Dep't Library Resources; PLI)	<u>Anti-Trust:</u> <ul style="list-style-type: none"> Overview of applicable laws/doctrines Patent Misuse Doctrine Distinguished (BPEC; Dep't Library Resources; PLI) <u>Patents:</u> <ul style="list-style-type: none"> IP Clearance – overview; working with outside counsel Searching – generally Reissue/re-examination - overview Interference - overview Litigation – overview Government Contracts –drafting the statement of work; defining “deliverables”

	<p><u>Non-disclosure Agreements</u>: preparation.</p> <p><u>Patents</u>:</p> <ul style="list-style-type: none"> Overview (domestic/foreign) of patenting process <ul style="list-style-type: none"> Preparation of patent application – format, drawings, formal papers Preparation of Basic Responses –missing parts, restriction requirements, etc. IDS practice Filing Continuing Applications Working with Agent/Attorney re: more substantive responses, appeals, etc. Preparation of Documents for Foreign Filing. Preparation of Documents for Outside Counsel Patent Awards Electronic filing; PAIR <p><u>Trademarks</u>:</p> <ul style="list-style-type: none"> Overview (domestic/foreign) <p><u>Trade secret</u>:</p> <ul style="list-style-type: none"> Overview 	<p><u>Patents</u>:</p> <ul style="list-style-type: none"> Foreign patent drafting and prosecution/ Patent Cooperation Treaty/Paris Convention/Various Community Patent systems Infringement – direct; indirect <ul style="list-style-type: none"> claim interpretation literal infringement; Doctrine of Equivalents Rights in technology funded by the Government <ul style="list-style-type: none"> reporting criteria, preparation of reports data rights – limited; unlimited patent waivers NASA; Dep’t of Energy <p><u>Trade secret</u>:</p> <ul style="list-style-type: none"> Transfer of information to third parties – when? how? why? <p><u>Trademarks</u>:</p> <ul style="list-style-type: none"> Searching – sending marks out for search Preparation of Applications - drawings, description of goods/services Basic Responses 	<p><u>Trademarks</u>:</p> <ul style="list-style-type: none"> Searching Clearance of proposed marks Preparation of Applications - drawings, description of goods/services More substantive responses Oppositions – overview Cancellations - overview
	INTRODUCTORY	INTERMEDIATE	ADVANCED
Technical Skills (e.g., computer skills)	<p><u>BPEC</u></p> <p><u>E-mail/Calendar Application</u></p> <p><u>PowerPoint</u></p> <p><u>Excel or other spreadsheet application</u></p> <p><u>Expense Reporting Application (as submitter)</u></p> <p><u>IP Docketing systems</u> – patents, trademarks, annuities</p> <p><u>Knowledge Management/UT Counsel</u></p> <p><u>Matter Management Application</u></p> <p><u>Performance Evaluation/Career Development Applications (e.g. PFT, IDP, 360) as evaluated person</u></p> <p><u>PLI</u></p> <p><u>Vendor Billing Application</u></p> <p><u>Word Processing Application</u></p>	<p><u>Performance Evaluation / Career Development Applications(e.g. PFT, IDP, 360, UTC Counsel Evaluation) as invited rater</u></p>	<p><u>Performance Evaluation/Career Development Applications (e.g. PFT, IDP, 360, UTC Counsel Evaluation) as supervisor – if appropriate</u></p>
	INTRODUCTORY	INTERMEDIATE	ADVANCED
“Soft” Skills (inter-personal, leadership, negotiation, supervision)		<p><u>Negotiation</u>:</p> <ul style="list-style-type: none"> Overview of Skills & Strategies (Dep’t Library Resources; Learning Portal) 	<p><u>Leadership</u>:</p> <ul style="list-style-type: none"> Public speaking & giving presentations UTC Leadership Competencies (Learning Portal; P&W/UTC Websites; UTC Evaluation Form)

Training Roadmap for Paralegal, Operations G36 – L5)

GENERAL SUBJECT	SPECIFIC SUBJECTS <i>(List Specific Training Providers/Courses in Parenthesis)</i>		
	INTRODUCTORY	INTERMEDIATE	ADVANCED
General Business Acumen (e.g. accounting, finance, etc.)			<u>Accounting:</u> <ul style="list-style-type: none"> Basic overview of financial accounting Understanding Financial Statements <i>(Dep't Library Resources, Learning Portal; PLI)</i>
UTC/Pratt & Whitney-Specific (e.g., products, services, markets, strategies, policies, procedures, ACE/processes)	<u>Continuous Improvement:</u> <ul style="list-style-type: none"> Overview of concepts/tools (e.g., QCPC; Root Cause, 6S) <u>Products/Services:</u> <ul style="list-style-type: none"> Basic overview of P&W business segments (LCE, MME, SME, PWC, PWPS, SMS, Space), their products, services, markets, and competition. <i>(Dep't Library Resources, Jet Familiarization Course)</i> <u>Policies/Procedures:</u> <ul style="list-style-type: none"> Anti-trust Business ethics/practices (including gifts) Email, Intranet, Internet, other electronic communication systems Harassment in the workplace Proprietary Information Securities trading/material non-public information <i>(Corporate Policy Manual; GS&D website; P&W Policies & Standard Procedures)</i> 	<u>Products/Services:</u> <ul style="list-style-type: none"> Basic overview of mechanics of gas turbine engine – 2-day Jet Engine Familiarization Course <i>(Dep't Library Resources; Various UTC-Division Websites)</i> <u>Policies/Procedures:</u> <ul style="list-style-type: none"> Anti-kickback Approval and Signature Authority (both P&W and UTC) Competitive Intelligence Conflict of interest Export/Import Controls/Economic Sanctions Foreign Sales Representatives Group Strategy & Development Standard Procedures Improper payments Record retention P&W Procedure B.17.1 (Supplier Accountability) Intellectual Property <i>(Corporate Policy Manual; Corporate Identity Manual; P&W Policies & Standard Procedures)</i> 	<u>Policies/Procedures:</u> <ul style="list-style-type: none"> Government Relations Overview of other UTC business segments (Carrier, Chubb, HSC, Otis, UT Fuel Cells, Sikorsky) <i>(Dep't Library Resources; Various UTC-Division Websites)</i> Press releases & other company communications Search warrant preparation and response Sarbanes Oxley Business ethics/practices Use of ACE tools <i>(Corporate Policy Manual; P&W Policies & Standard Procedures)</i>
Profession & Field of Expertise	<u>Anti-Trust:</u> <ul style="list-style-type: none"> Basic overview of general concepts <u>Business Organizations:</u> <ul style="list-style-type: none"> Basic overview of corporate forms <i>(Dep't Library Resources)</i> <u>Improper Payments:</u> <ul style="list-style-type: none"> Basic overview of Foreign Corrupt Practices Act & related domestic and foreign laws (e.g., regarding foreign reps) <i>(BPEC; Corporate Policy Manual UTC/P&W SP & Policies)</i> Basic overview of confidentiality obligations <i>(BPEC; Corporate Policy Manual; Dep't Library Resources; PLI; P&W Policies & Standard Procedures)</i> <u>Securities Laws:</u> <ul style="list-style-type: none"> Basic overview of insider trading and disclosure of material non-public information <i>(Dep't Library Resources)</i> 	<u>Export/Import:</u> <ul style="list-style-type: none"> Basic overview of applicable laws (e.g., BIS, ITAR) <i>(BPEC; Corporate Policy Manual; Dep't Library Resources; P&W Policies & Standard Procedures)</i> <u>Intellectual Property:</u> <ul style="list-style-type: none"> Basic overview of applicable laws (e.g., BIS, ITAR) <i>(BPEC; Corporate Policy Manual; Dep't Library Resources; P&W Policies & Standard Procedures)</i> <u>Litigation:</u> <ul style="list-style-type: none"> Basic overview Forms of discovery Handling discovery requests (e.g., subpoenas) 	

	INTRODUCTORY	INTERMEDIATE	ADVANCED
Administrative & Technical Skills (e.g., computer skills)	<p><u>BPEC</u></p> <p><u>Email/Calendar Application</u></p> <p><u>Investment Restrictions & Obligations Database</u></p> <p><u>Internet Resources:</u> Hoovers, Yahoo Financial, other websites containing public information about target entities (e.g., annual & quarterly reports, press releases, financial indicators, etc.)</p> <p><u>Knowledge Management/UT Counsel</u></p> <p><u>Matter Management Application</u></p> <p><u>Performance Evaluation/Career Development Applications</u> (e.g. PFT, IDP, 360) (as evaluated)</p> <p><u>PLI</u></p> <p><u>Proofreading:</u></p> <p><u>Scanning Application:</u></p> <p><u>UTC Entities Database</u></p> <p><u>Word Processing Application</u></p> <p><i>(Learning Portal for all above)</i></p>	<p><u>PowerPoint</u> <i>(Learning Portal)</i></p> <p><u>Vendor Billing Application:</u></p> <ul style="list-style-type: none"> Processing Invoices <p><u>Westlaw/Lexis:</u></p> <ul style="list-style-type: none"> D&B Reports Litigation / lien other encumbrance search <p><u>LawPack</u></p> <ul style="list-style-type: none"> <u>Basic understanding of system</u> <p><u>Software applications:</u></p> <ul style="list-style-type: none"> Microsoft: Word, Excel, Access <i>(Learning Portal)</i> <p><u>Performance Evaluation/Career Development Applications</u> (e.g. PFT, IDP) (as evaluated)</p>	<p><u>Spreadsheet Application:</u></p> <ul style="list-style-type: none"> Basic spreadsheet function Formulas <p><u>Vendor Billing Application</u></p> <p><i>(Learning Portal for all above)</i></p>
	INTRODUCTORY	INTERMEDIATE	ADVANCED
“Soft” Skills (inter-personal, leadership, negotiation, supervision)	<p><u>Interpersonal:</u></p> <ul style="list-style-type: none"> Guidelines for Professional Conduct (Respect, Recognition, Feeling Valued Team Website) <p><u>Development:</u></p> <ul style="list-style-type: none"> Coaching for development (for employees) <i>(Dep’t Library Resources)</i> 	<p><u>Interpersonal:</u></p> <ul style="list-style-type: none"> Communications competencies UTC Competencies (Employees) <p><i>(Learning Portal; P&W/UTC Websites; UTC Competencies (Employees); UTC Communications Competencies)</i></p>	<p><u>Negotiation:</u></p> <ul style="list-style-type: none"> Overview of skills & strategies <p><i>(Dep’t Library Resources, Learning Portal)</i></p>

PROFESSIONAL DEVELOPMENT FOR THE IN-HOUSE PARALEGAL

ACC Corporate Counsel University

April 30, 2007

Brian Haberly, Senior Paralegal
Starbucks Coffee Company

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Self-Promotion

Importance of Self-Promotion

The more visible you are, the more likely people are to remember you, especially at raise and promotion time. This concept can be hard to accept for introverts who would rather wait to be noticed. One of the best ways for introverts to increase their visibility is by writing for the department or company newsletter, using their organizational or information gathering skills that they may be more comfortable in displaying.

How else can you make yourself visible? **By speaking up!** When you are in a group or department meeting, try to think of something you can say that would contribute to the conversation. If you have a good idea for something, share it! (And make sure you get the credit for it.)

Find ways to let people know what you are doing. Not all supervisors are good at sharing the credit of their direct reports contributions. If you are in a common area and overhear someone (especially those in senior positions to you) discussing a project you were involved with, you might interject "Yeah, I worked on the ["XYZ"] aspect of that project, and boy was it complicated!" Otherwise, they may not even know you were involved. (One caution here – if it was a confidential project, you don't want to come across as "loose-lipped" with sensitive info.)

Many people successfully market themselves into promotions by seeking new responsibilities. **Volunteer for committee assignments** where you will be working with a group of people – ideally some who have higher positions than yours. Anything you can do to procure a high-visibility assignment will greatly help people notice you and make it much more likely that your boss will agree with your request for a raise.

Remember, if you want something (an assignment, a job, a promotion, whatever) you must show your audience how much you want it. Otherwise, they may assume you don't.

Getting Your Work Noticed By Your Employer (overt methods)

- **Be a self-starter.** Offer new ideas backed by research to your supervising attorney or or management team
- **Follow through** with your ideas when approved
- **Be willing to work hard** to make your supervisor's ideas successful (even if they don't knock your socks off immediately!)
- **Strive to write well.** Give your supervisor concise, readable reports that make important points without extraneous information
- **Don't bring your attorney problems** expecting him/her to solve them for you. Instead, bring possible solutions (3 or more choices are best) and make a supportable recommendation of your preferred choice. Chances are, your boss will agree with you!

Getting Your Work Noticed By Your Employer (subtle methods)

- Did you complete a Project that had very good results? If someone thanks you via email for your efforts, thank them back for the opportunity. Let them know that you enjoyed working with them and “CC” your boss so that she/he knows of your success.
- If a client verbally thanks you, memorialize the conversation in an email --“Sally, I sincerely appreciated your kind words earlier today on the successful completion of Project ABC. I hope we can work together on another interesting and challenging project like this again soon!
- Don't underestimate the value of delivering Progress Reports – Track your progress on longer term projects by alerting your boss to milestones being hit, or any additional resources that you might need to meet a deadline. Don't surprise your boss the night before a deadline with the bad news that you won't be able to deliver on time, when a call for help a few days earlier would have been able to solve the problem. Your boss will be more forgiving of you alerting him/her to your needing assistance than they will when being told AFTER it is too late to make a difference.
- Celebrate your successes. Even if no one else does, plan a small celebration following a major achievement. Schedule a celebratory meeting in a conference room. Bring in a cake or some pastries, invite the key players you worked with, and

relive the success and relieve some stress! This small step will reinforce your role and participation and leave everyone with a positive memory of you. (And likely ensure that you get involved again on an even bigger project next time around!)

Getting Your Work Noticed by the Profession

- Attend local professional meetings regularly (both paralegal and trade associations)
- Volunteer to work on committees either locally or nationally. Respond positively to the pleas for help that come by email or in publications
- Help with presentations at conferences. You can start by being an assistant who collects evaluation forms or does other small jobs. Talk with the presenters and hosts. Learn what it takes to become a presenter, and volunteer to be a presenter at a future meeting.
- When attending presentations, ask good questions. Be willing to talk to others after presentations end. Always have business cards in your pocket to hand out.
- Network with others who share your interests. They will help you share your work with an even larger audience.
- Write an article for your local paralegal association newsletter or Legal Assistant Today. Be sure to mention your boss and company by name (everyone loves to see their name in print.) Show any published items to your boss – they love to be able to share your success with their own supervisor (makes them look like effective managers that have hired the right people.)

Getting Your Work Noticed by Others

- Find a local non-profit organization that you admire. Donate some time and expertise to them, not just write them a check
- Does your paralegal association have an annual Bosses luncheon or dinner program? Invite your boss so that she/he can see what you have been doing to enhance your profession. (Legal Secretaries have done this well for years.)
- Volunteer Pro Bono hours at a neighborhood legal clinic, a women's rights group, a literacy organization, or a Habitat for Humanity project
- If you have been involved with a charitable org for at least six months, see if your company will co-sponsor a fundraiser and/or lend their name to it (more likely if you have been involved for a time). Offer to head up the collection drive so that others in your office will see your name and associate your volunteer efforts with the charity

II. Value of Networking

- Does your Company offer any employee activities? Networking isn't restricted to professional organizations. Consider joining a company Softball Team, a Running Club, a Book Club, or even a Bowling League! If you have nothing established yet,

- see if you can start up a group using a company meeting space, either during the lunch hour or after hours. (Practice your leadership skills!)
- Networking with members of other departments outside of the legal department enables to you to gather information you wouldn't otherwise have access to. You will be more valuable to your boss, understand your own company better, and be a better representative of your company to others.
 - Get involved in a Toastmasters Club at work or in the community to enhance your communication and leadership skills, while meeting with people from different backgrounds and experiences. You'll gain self confidence by leaps and bounds, and you might just meet someone who spots you as a potential leader on their team!
 - Develop your listening skills, and help others develop their own skills and advance in their own careers (servant leadership in action.)
 - Connect/Reconnect with people outside of the usual employee/employer relationship. Make new friends and deepen your own range of outside interests. You'll have more to contribute personally and professionally by virtue of your well-rounded views and growing knowledge base. Learn to "CLICK" – **C**-Connect; **L**-Listen, **I**-Inquire, **C**-Collaborate, **K**-Keep. That is, Connect with the network of people that surround you (smile, listen, and establish eye contact. Listen with full focus. Inquire, drop your ego, and learn what really matters to the other person. Collaborate and really be of service to the other person. Keeep your relationships vital and healthy by staying connected, keeping them in mind, and serving their needs. Listen right now... Can you hear some soft Clicking going on in this room and all around you?

III. Professional Development

Formal Education:

- Need to finish up a degree? What is stopping you? (If your answer is either time or money, recognize and admit to yourself that there are solutions for both of these situations.)
- Considering an Advanced degree? Will your employer help with costs?
- Long time Paralegal without a Paralegal Certificate? Consider completing a Certificate Program for yourself, even if your employer doesn't see it as necessary! (Might be mentally discounting your worth because your co-workers had classroom training and yours was gained largely on the job.)

Advanced Paralegal Certification:

- Have you looked into becoming a PACE Registered Paralegal ("RP") to further demonstrate your competency, as administered through the National Federation of Paralegal Associations?

- Have you looked into taking NALA's exam to obtain your Certified Legal Assistant/Certified Paralegal ("CLA/CP") status, as administered through the National Associations of Legal Assistants?
- What about obtaining a Certification for your own legal specialty area? (Such as the Certified Equity Professional designation for paralegals dealing in Stock Plan Administration). What would this do for you at annual review time? How about when you go to look for that next job

IV. Tips for staying Motivated

Each of us is driven to take action for somewhat different reasons, but one of the most important ways in which to find your own personal inner desire is to believe in yourself.

You must strive to maintain a positive self image in order to overcome the challenges that arise each day. Look at new tasks as challenges to help you grow, not just as drudgery and work. Try to find something new to learn every day. Capturing your thoughts in a journal is a great way to capture your successes and learn from your disappointments. Celebrate your successes!

Know your desired outcome: CLARITY IS POWER! (Mentally, Emotionally, Spiritually, & Financially). Focus on what it is you really want, not on what you don't want! (Your brain will continue to work on a problem and sometimes finds answers for you even while you sleep!

Some Truths about Effecting Change:

So, you think you want to change but you don't know how to start.

First, you have to Believe that you CAN change and change NOW!

Second, you have to Believe that we're each responsible for our OWN change, not our spouse, not our parents, not our kids, etc.

Third, you have to Believe that something MUST change it, and secondly, that you CAN change.

Remember, Life can sometimes seem like it is all about being discontent – but that discontent can be a positive thing, if you use it to Motivate you to effect change in your own life!

Everyone has something that they are not 100% happy with. The only people that don't want to change something are those people buried 6 feet under. They have no more problems left to solve, but I don't think you want to trade places with them now, do you?

Motivation (Continued)

What is the Best Method to Create Lasting Changes in your Life?

Recognize that ALL Human activities are driven by one of two Motivations:

- 1) The Desire to Avoid Pain; and**
- 2) The Desire to Gain Pleasure**

Of these two Motivations, the Desire to Avoid Pain is the Stronger.

Don't agree with this statement? Then think of things many people avoid:

Diets, Dating, New Job Searches, Financial Planning, Dealing with Aging Parents, or perhaps even having your own Will written. Intuitively, you KNOW you should take some actions on one or more of these areas, but you haven't. **WHY NOT?!?**

For many, the reason is that they are Frozen into Inaction out of Fear. Fear of Failure, Fear of Pain, Fear of Embarrassment, and Fear of Loss (emotional, financial, and other).

Despite the fact that the odds of something good happening far outweigh the odds of failure, and the rewards of success may be plentiful.

So, how do we break out of this Paralysis?

The answer is to Get Leverage on Ourselves!

Remember the 3 Beliefs for Change:

- 1) Something Must Change;**
- 2) I Believe that I Must Change it; and**
- 3) I Believe that I CAN change it.**

V. Sense of Fulfillment

Deep down, we aren't really looking for a fancier job title, or a bigger office, or a shiny new car. None of those will bring more than a momentary feeling of happiness.

What we really want is a Sense of Fulfillment

How can we feel fulfilled? Each of us needs to understand why we were put here, and what our role was meant to be while we're alive. Many wise men and women have learned that long-term fulfillment will only come from giving back to others and making the world a better place.

Look at Bill Gates and Warren Buffett. They are each giving away Billions and Billions of dollars to help people they will likely never meet. Why? They understand their responsibility to give back some of the rewards of success that they've achieved, and not just pass all their wealth down to their offspring.

Your Purpose in Life?

Have you thought about what makes you feel truly fulfilled? It shouldn't be just getting that last raise, and it's not about hitting even lofty goals, or you'll ask yourself at life's end, "Is that all there is?"

My suggestion to you is to Focus on Enhancing the Meaning of Life

Stand up for something. Make a difference in someone else's life. Keep exploring and asking questions until you find out what gives your own life its meaning.

The creator put you here for a reason. Why are you here? What will you contribute to your world? What gifts do you have to give? Answer these questions, and you'll get closer to your God.

Ultimately, it comes down to decisions. Decisions help us to see what we focus our attention on, and what those decisions mean to us.

If you don't know why you are here, you'll never win at the Game of Life!

- 1) You can't win a game if you don't know the Purpose of the Game. You have to know what it is you want, and not just what you don't want!
- 2) People have all these "Rules" they have to live by to be happy, but other people don't play by the same Rules you are playing by! Rules about how your spouse or significant other "should be", how your Boss "should be", or perhaps something they are doing (or not doing) that doesn't fit within your rules. Surprise!! They don't know the Rules of the Game you are Playing!! Have more compassion for others. Relax! You may simply be misinterpreting their actions and intentions.

You'll be far happier if you have Fewer Rules for Other People

- 3) Rules are often in Conflict with one another. You end up setting yourself up for Pain.
- 4) Even when you play by the Rules, you still sometimes get pain. Why? You need to look for a deeper meaning. "If I don't use this lesson today, how can I use it tomorrow? What can I learn from the pain I'm experiencing today?"
- 5) Caution – Sometimes breaking the Rules will give you Pleasure, but that isn't always a good thing. You might break your own rules and experience some momentary pleasure, but it isn't permanent or real. This can result in creating bad associations (such as alcohol or drug abuse) and take you away from your higher purpose.

How to become Fulfilled?

- **Form a Plan**
- **Get Started**
- **Gain Momentum**
- **Get Smart/Be Compelled to Succeed**

Remember, you can't build on Failure only on Success. Don't ask yourself endless "Loop" questions like "Why do these things always happen to me?" "Why can't I ever get the job I want?" "Why can't I find a better boss, relationship, etc?" "Why can't I stick to my exercise/diet plan?"

These questions have no good answers, only looping. Instead, your brain will tell you "It is because you are such a loser!" Instead, STOP! Step back and Think!

You need to train yourself to ask Better questions if you want Better Answers!

“How can I find the high quality job I really deserve? How can I complete this large assignment on time and have fun doing it? How can I successfully save for that vacation/car/house/retirement and still reward myself today?”

Steps to Clearer Decision Making (and hence, fulfillment!)

1. Get Clear on Where you Really are today. (Not worse than you are!)

What are some things you are Most Proud Of?

What are some recent challenges you've faced that you don't want to again?

What did you learn by going through those experiences and why were they valuable to you?

What important decisions did you make this past year, and what decisions might you make in the coming year as a result?

2. Get Certain

Write down Big and Little things that at one time seemed impossible to achieve or acquire, but that you somehow did!

Then write down the Steps you went through to turn it into a Reality. (Did you form a Plan? Focus on the task continuously? Invest a lot of emotion and energy?)

3. Get Excited!

Write down a list of goals, both Big and Small.

Write down the number of Years alongside each one that you want each goal to take to achieve (1 year, 2-3 years, 5 years, 10 years, 20 years)

4. Get Focused!

Circle your top three 1 Year Goals that If you could achieve them, you would get up Early each day, and keep you up late each night to ensure its success.

5. Get Committed!

For each one of the three goals, write a paragraph about why each one is an absolute MUST for you to achieve, no matter what! Remember, Reasons come first, Answers Come Second! (Why must you succeed?)

Next, identify some of the things you may need to do that you don't WANT to do to achieve these goals. (Be honest! Look yourself in the mirror!)

6. Gain Momentum!

Decide NOW what is one small thing you will do IMMEDIATELY, today, towards achieving your top three goals. (Make a phone call, write an email, Book a meeting, Call a Mentor, Sign up for a class, etc.)

What is one BIG thing you Resolve to do immediately to achieve these goals? Make a Decision! Throw away cigarettes, drugs, alcohol, junk food, whatever, but do it today!

7. Get Smart!

To follow through you must monitor your progress frequently! The more often you Measure, the more likely you'll succeed! TIP – Tell a friend or Mentor of your Goal and Timeline. That small action will make you accountable for its success! Celebrate your success as you reach your goals to reinforce your own positive behaviors!

Appendix A**Rules for Working Hard, Easily**

1. Don't see yourself as "Atlas" carrying the weight of the world on your shoulders. (Don't take yourself so deadly seriously!)
2. Determine to enjoy your work! Strive to see it as a pleasure and not as a drudgery or chore. (Change yourself and your attitude, instead of changing your job!)
3. Plan your Work – Work your Plan! (Failure to plan leads to a feeling of overwhelm)
4. Don't try to multi-task and do everything at once, nor for everyone. Do one thing well, and then move on to the next. (Peace of mind and you won't have to revisit those tasks that were 95% completed.)
5. Keep a positive mental attitude. When you think of work as hard, it will be hard! Think of it as fun and easy and it tends to become more fun and more easy!
6. Become efficient in your job. Knowledge Equals Power. It is easier to do a thing right, then to knowingly do it wrong.
7. Practice being relaxed. Take things in stride
8. Discipline yourself. Don't put off until tomorrow what you can do today!
9. Be thoughtful – Start your day by meditating or Praying about your work and your life each morning. You will remove stress and become more relaxed, and that may help you solve a problem you had been stuck on for far too long!
10. Think about God/a Higher Being, and his role in your life. Ask for and expect his help, often coming to you in unexpected ways! Smile when you see that God has a sense of humor! Know too that God's delays are not God's denials. He is more interested in our Character than our Convenience!

Appendix B

Additional Reading

Awaken the Giant Within – Anthony Robbins

Developing the Leader Within You – John C. Maxwell

If It's Going to Be, It's up to Me: The Eight Proven Principles of Possibility Thinking - Robert H. Schuller

The Power of Positive Thinking – Norman Vincent Peale

Appendix C

Quotable Quotes

"Empty pockets never held anyone back. Only empty heads and empty hearts can do that." Norman Vincent Peale

"The truth of the matter is that there's nothing you can't accomplish if:
(1) You clearly decide what it is that you're absolutely committed to achieving,
(2) You're willing to take massive action,
(3) You notice what's working or not, and
(4) You continue to change your approach until you achieve what you want, using whatever life gives you along the way." Anthony Robbins

"Holding on to anger is like grasping a hot coal with the intent of throwing it at someone else; you are the one who gets burned. Buddha

"The optimist sees opportunity in every danger; the pessimist sees danger in every opportunity." Winston Churchill

"People rarely succeed unless they have fun in what they are doing." Dale Carnegie

"Do, or do not. There is no *try*" Yoda

"Now is the time to fix the next ten years." Jim Rohn

"Without goals, and plans to reach them, you are like a ship that has set sail with no destination." Fitzhugh Dodson

"If you raise your children to feel that they can accomplish any goal or task they decide upon, you will have succeeded as a parent and you will have given your children the greatest of all blessings." Brian Tracy

"Since most of us spend our lives doing ordinary tasks, the most important thing is to carry them out extraordinarily well." Henry David Thoreau

"We make a living by what we get, but we make a life by what we give."
Winston Churchill

"Remember happiness doesn't depend upon who you are or what you have; it depends solely on what you think." Dale Carnegie

"Success is getting what you want; happiness is wanting what you get." Dale Carnegie

"Happiness is a perfume you cannot pour on others without getting a few drops on yourself." Ralph Waldo Emerson

"Vision without action is merely a dream. Action without vision just passes the time. Vision with action can change the world." Joel Barker

"Go confidently in the direction of your dreams. Live the life you've imagined."
Henry David Thoreau

"The future belongs to those who believe in the beauty of their dreams." Eleanor Roosevelt

ORGANIZING YOUR CAREER

- Where do you want your career to go?
 - Vertically
 - Horizontally
 - Cross-Functionally
- What is your legal department's organizational structure?
- Paralegal grades/tiers
- Training roadmaps for development (see written materials)

Core Competencies Roadmap for Paralegal

Core Competencies	Required Level of Competency
• Knowledge of legal terminology, principles, and documents – Basic, Specialized, Expert	
• Ability to examine, review, prepare legal documents and correspondence, and conduct legal and factual research in applicable practice areas	
• Organizational, communication, analytical, and detail-oriented skills	
• Perform various tasks in applicable practice area including but not limited to document numbering and organization, government filings, drafting of legal correspondence, agreements, legal documents, and other projects that require knowledge of the transactions or legal matters involved.	
• Individual competencies, including analytical skills, problem solving/decision making, strong written and oral communication skills	
• Leadership competencies, including goal setting/progress monitoring, delegating skills, listening	
• Problem solving abilities	
• Computer literate – fully capable of applying company designated software and navigating the Intranet and Internet	
• Willingly pursues knowledge and share information to enhance performance	
• Prioritizes work to complete tasks when required	
• Applies sound judgment to act independently and to engage supervision as necessary	
• Capable of effective performance and works with others to achieve goals of team	
• Displays integrity and commitment to Company values and Code of Ethics	

SKILL LEVEL:

- 0 = no knowledge
- 1 = awareness developed
- 2 = skills have been developed
- 3 = can assist in developing skills of others

- Look at your legal department landscape
- Put together a cohesive plan
- Get buy-in from Legal Management
- Implement!
- *Bottom Line – It's your career!*

Self Promotion

- ***Increase your visibility***
- ***Speak up! (Contribute at meetings)***
- ***Find ways to let people know what you are doing***
- ***Volunteer for Committee Assignments***
- ***Write Accomplishment Statements (Past Problem/Actions Taken/Results)***

The Importance of Networking

- ***Professional Organizations***
(NFPA/NALA/Others in your specialty area)
- ***Cultivate friendships across departments***
- ***Join Toastmasters to enhance your Communication & Leadership Skills***

The Importance of Networking

- ***Practice Active Listening Skills***
- ***Take the effort to connect/reconnect with old and friends outside of work; talk about life, not just shop talk (over coffee, perhaps?)***

Professional Development

- ***Formal Education (Undergrad and Certificate Programs)***
- ***Advanced Paralegal Certification (PACE, CLA/CP)***
- ***Specialty Certifications (i.e. CEP)***

Tips for Staying Motivated

- ***Belief in your self is KEY!***
- ***Bring a Positive Self Image to each situation***
- ***Clarity is POWER***

"Remember happiness doesn't depend upon who you are or what you have; it depends solely on what you think."

Finding a Sense of Fulfillment

Sense of Fulfillment:

- ***What we really want is a
Sense of Fulfillment***
- ***What is Your personal purpose in life?***
- ***Finding/Enhancing the meaning
of your life***

Sense of Fulfillment (cont'd.)

The Game of Life:

- ***If you don't know why you are here,
you'll never win at the Game of Life!***
- ***You'll be far happier if you have Fewer
Rules for Other People***

Sense of Fulfillment (cont'd.)

How to become Fulfilled?

- ***Form a Plan***
- ***Get Started***
- ***Gain Momentum***
- ***Get Smart/Be Compelled to Succeed***

Sense of Fulfillment (cont'd.)

Decision Making Process:

- ***Get Clear (where you are today)***
- ***Get Certain (write down things in a journal)***
- ***Get Excited (identify your goals and timeline)***
- ***Get Focused (pick your top 3 that get you juiced!)***

Sense of Fulfillment (cont'd.)

Decision Making Process (Cont'd):

- ***Get Committed (write out commitment)***
- ***Gain Momentum (do something TODAY!)***
- ***Get Smart (monitor your progress)***