



809:Managing Through Times of Change

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Faculty Biographies

Robert J. Flax

Robert J. Flax is assistant general counsel and director, corporate law for the California State Automobile Association and the California State Automobile Association Inter-Insurance Bureau ("CSAA"). He oversees the operation and administration of the corporate law department in the office of the general counsel, supervising eight attorneys and nine support staff. His practice areas include employment, compensation and benefits, information technology, litigation, financial services, marketing, real estate, and software licensing.

Prior to joining CSAA, Mr. Flax served as executive vice president, general counsel and secretary for Bay View Bank and its holding company, Bay View Capital Corporation. During his career at Bay View, Mr. Flax led its initial public offering, negotiated numerous acquisitions and public financings, and managed Bay View's legal and regulatory affairs. He also served as Bay View's chief administrative officer.

Mr. Flax is a graduate of Johns Hopkins University and the University of California, Hastings College of the Law.

Theresa McPherson, Esq.

Theresa J. McPherson is founder of Mondial Consulting Inc., a San Francisco-based consulting boutique specializing in litigation, project, and specialized resource staffing management consulting for law firms, companies, regulated utilities, and governmental agencies. Mondial designs, implements, and manages a variety of matters for clients assisting them through all phases of complex litigation cases, business projects, and regulatory proceedings.

Prior to founding Mondial, Ms. McPherson worked for several San Francisco-based emerging companies where she served as senior vice president of business development and counsel/strategic business operations. Prior to entering the emerging company environment, Ms. McPherson was a litigation associate for Latham & Watkins and served as a San Francisco deputy public defender.

Ms. McPherson has a BA from Hope College and is a graduate of the Northwestern University School of Law.

Melissa Rosen

Melissa Rosen is division director for The Affiliates.

She began her staffing industry career when, after working as a licensed adolescent therapist and then attending law school to study therapeutic jurisprudence, she was asked to help direct the legal placement business unit for Robert Half International in San Francisco. Since that time Ms. Rosen has been instrumental in the Western region expansion of The Affiliates, which has locations in major markets throughout the United States and Canada.

Ms. Rosen is a graduate of New York Law School where she received a JD and a Master's from University of New Mexico/Webster University.

Managing Through Times of Change

How to Weather the Storm

ACCA Annual Meeting
Session 809

Panelists

Melissa Rosen
Division Director, The Affiliates

Robert J. Flax
Assistant General Counsel and Director,
Corporate Law, California State Automobile
Association

Theresa McPherson Esq.
Founder, Mondial Consulting Inc.

Workplace Morale Impacts Return on Investment

- Boosting morale is the most effective strategy for employee satisfaction
- Poorly managed change impacts morale
- Guide staff through transition, inspire trust and confidence
- Engaged managers (and employees) directly contribute to a firm's ROI

Lead by Example

- Many teams are busier than ever, yet have fewer resources
- Morale may be at an all-time low
- A good leader guides staff through periods of transition
- Motivation starts with *you*

The Importance of Leadership

Engaged Leaders:

- Provide clear sense of direction
- Keep employees informed of objectives, company performance
- Respect employees, seek facts before making decisions
- Provide growth opportunities, respond rapidly to industry developments
- Lead by example

A Positive Culture Boosts Morale

- In a recent survey, workplace morale ranked as the most effective strategy for boosting employee satisfaction
- Demonstrate trust
- Encourage reasonable risk
- Ask employees to devise solutions
- Make time for fun

Creating a Positive Workplace

- Minimize office politics
- Provide advancement opportunities
- Offer fair compensation
- Set expectations regarding values and behaviors

Stock Your Motivational Toolbox

- Promote teamwork and collaboration
- Recognize and reward employees
- Address stress and burnout proactively
- Provide direction during change
 - o Zones of change
 - o Responses to change
 - o Language of commitment

Encourage Open Communication

- Open communication = career development, risk taking, input, consensus building
- Be straightforward
- Foster two-way communication
 - Listen first
 - Criticize with care
 - Conduct frequent team meetings

Put Motivational Ideas into Practice

- Consider your company's goals and objectives
- Tailor your approach
- Let it evolve

How to Handle Staffing Shortages

- Make strategic staffing decisions
- Are you finding the right candidates?
- Are you retaining the right talent?
- Don't understaff; plan for seasonal fluctuations or new projects (Ex: Sarbanes-Oxley Act)
- Address morale issues immediately
- Your team will stay motivated

Signs of Staffing Shortages

- Frequent mistakes or missed deadlines
- Excessive overtime
- High turnover
- Absenteeism
- Stressed employees

Create a Staffing Plan That Works

- Assess your current staff and department workload
- Bring in specialized experts
- Make sure staff continue to meet deadlines and produce quality work

Questions and Answers

Additional Resources:

- *Motivating Employees for Dummies*, by Max Messmer, The Affiliates' chairman and CEO

CSAA Values & Behaviors

MEMBERS FIRST

- Keeps commitments to members and customers
- Understands and anticipates member needs
- Understands and promotes our products and services
- Acts in the best interest of the membership

INTEGRITY

- Behaves in an honest and ethical manner
- Embraces diversity by treating each individual with dignity and respect
- Acts in an authentic, truthful, and straightforward manner
- Actions are consistent with words
- Deals with conflict in a timely and constructive manner

COLLABORATION

- Thinks and acts beyond one's own work group
- Puts enterprise needs and goals ahead of individual objectives
- Takes responsibility to help others succeed
- Freely shares information
- Celebrates success

ADAPTABILITY

- Willingly seeks and considers new ideas, approaches, and best practices
- Anticipates and embraces change
- Willing to challenge current practices
- Overcomes obstacles to meet goals

ACCOUNTABILITY

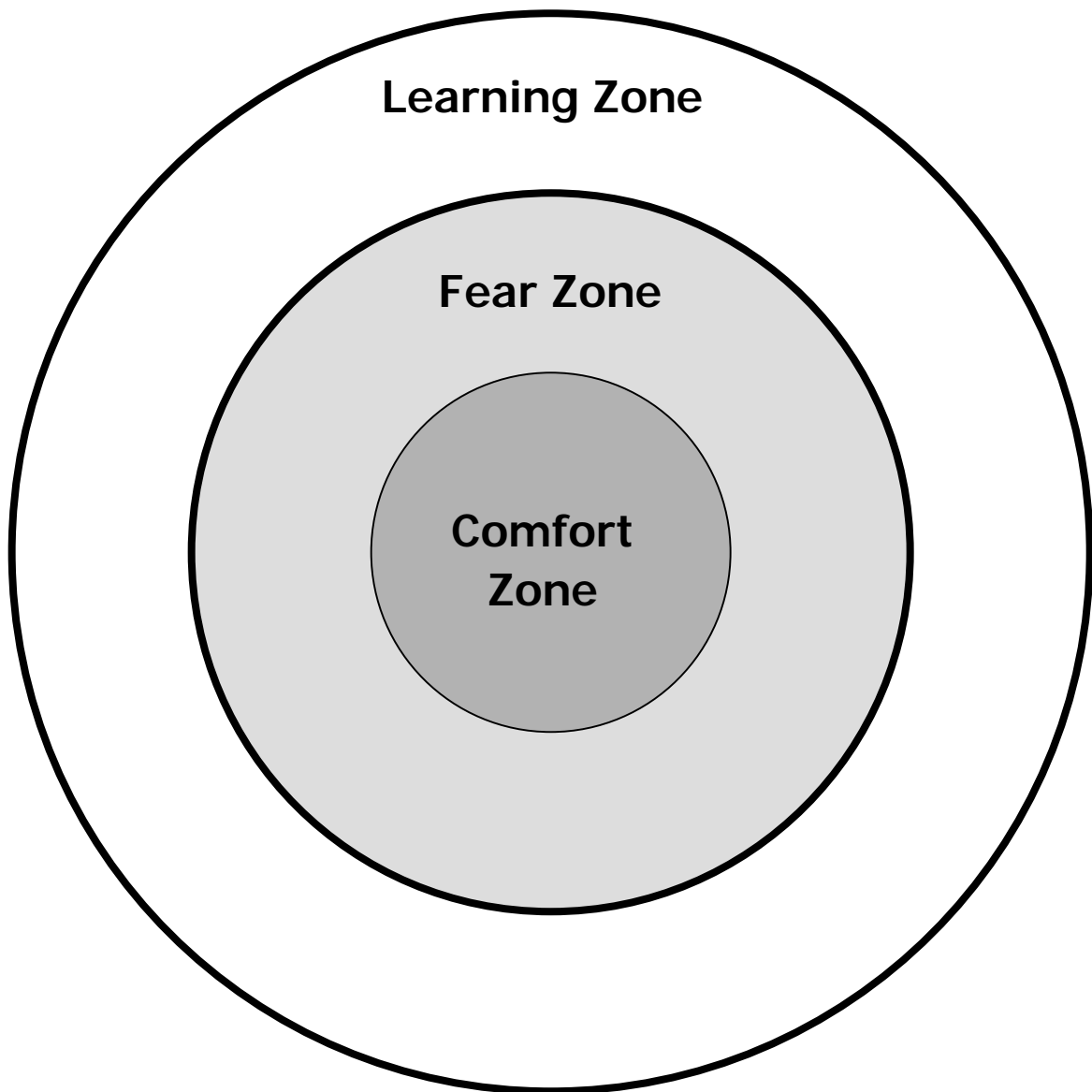
- Accepts responsibility for individual and group decisions and actions
- Holds self and others responsible for achieving results
- Takes initiative to solve problems personally and avoid unnecessary handoffs
- Acknowledges and learns from mistakes
- Takes personal responsibility for the organization's success

EXCELLENCE

- Consistently strives to deliver superior results
- Demonstrates a sense of urgency regarding implementation
- Seeks continuous learning and improvement
- Sets and achieves high standards of performance

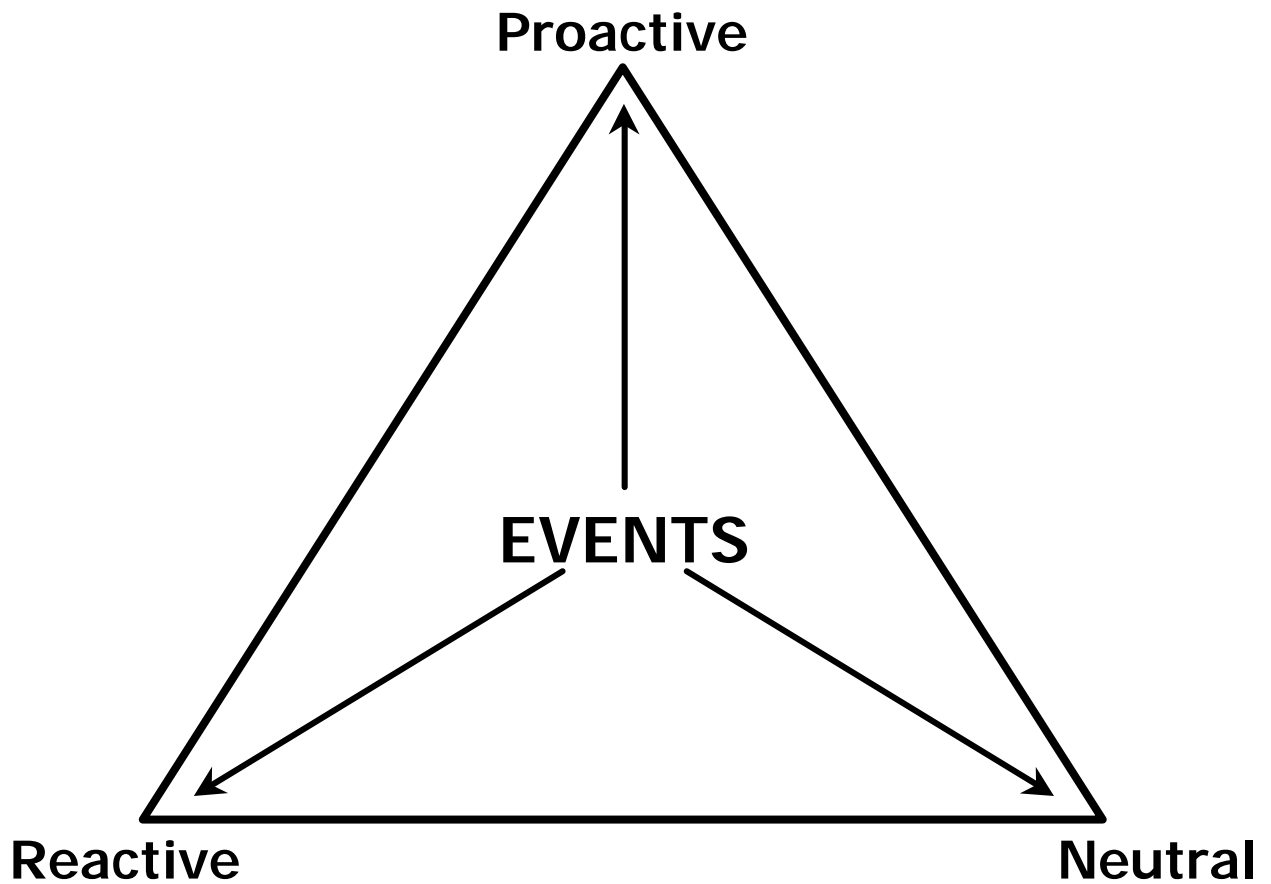


Zones of Change



Responses to Change

We may respond to an event in many ways. Here are three prime categories of response. The event does not care about our response. Our response is a choice.



Language of Commitment

