



How Many Hats Do You Wear? The Small to Midsize Firm Professional

Handouts and Resources

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THE HAT TRICK:

A Series of Three Victories, Successes, or Related Accomplishments

1. What are your top three successes that you would like to share with your firm?

1)

2)

3)

2. What are your top three accomplishments that you would like to share with your firm leadership?

1)

2)

3)

3. What are three victories that you'd like to achieve in 2023?

1)

2)

3)

Bonus: Who are three people that can help you achieve your victories?

URGENT/IMPORTANT MATRIX

	LESS URGENT	URGENT
IMPORTANT	<ul style="list-style-type: none">• Advance key goals• Planning orientation• Allow focused thinking and actions• Improved success when not rushing• Lead to most fulfillment	<ul style="list-style-type: none">• Top of to-do list• Deadline-driven• Emergencies• Cannot procrastinate• Minimize through planning• Space created for unexpected crisis
LESS IMPORTANT	<ul style="list-style-type: none">• May help goals of others but not yours• Distractions that don't add value• Get someone to do them or remove from your list• Procrastination activities	<ul style="list-style-type: none">• Time-wasters that get in the way of important tasks• Often caused by others• Set boundaries• Schedule times for interruptions and low value tasks e.g. email

Adapted from Stephen Covey's "The 7 Habits of Highly Effective People" Eisenhower Matrix

MEMORANDUM

TO: [Your Supervisor/Firm Leader]
FROM: [You]
DATE: [Date this memo is submitted]
RE: Annual Review: Accomplishments & Goals

[A memo that summarizes personal and team accomplishments over the review period helps to: demonstrate the extent to which you and/or team members met established goals; communicate with leaders about your value to the organization; provide insight about the volume of your efforts and, potentially, set the table for requests for additional resources or staffing; and provide context for goals, initiatives or requests related to an upcoming period. To the extent you can, avoid just providing information about the execution of routine job responsibilities or duties; you will want to highlight accomplishments.

In this space, a short introduction can provide a window into the strategic thinking behind the more detailed efforts below. In the areas below, bulleted information helps to provide a quick and high-level snapshot of your efforts in the areas of your responsibility. Below are sample headings and points of emphasis to consider.]

a. Recruiting

- [Accomplishments/goals to bullet here could include:
 - The successful management of a challenging OCI process;
 - Innovative lateral integration approaches;
 - Successful efforts to produce diverse candidate pools for various roles;
 - The implementation of technology to enhance the recruitment process; or
 - The promotion and retention of staff within your group.]

b. Professional Development

- [Accomplishments/goals to bullet here could include:
 - The implementation of new curricula or programming;
 - A new strategic approach to training, especially in relation to a hybrid or remote work environment;
 - Well-being initiatives;
 - Statistics related to retention and advancement; or
 - The successful management of career transitions or succession planning of any sort.]

Programs/Events

[If you are responsible for planning programs or events, it may be a good idea to list those that were well-received and particularly impactful.]

c. Diversity & Inclusion

- [Accomplishments/goals to bullet here could include:
 - Awards or recognition that you or your group helped the organization or individuals to achieve;
 - The implementation or administration of a DEI initiative that has produced tangible results (such as a sponsorship initiative);
 - Influence with respect to diversity demographics; or
 - Successful engagement with clients on DEI-related issues or with respect to DEI-related events or programming.]

d. Other

- [In some instances, it may be beneficial to include information not covered in the general areas above—such as:
 - Internal and external presentations you've led or conducted;
 - Ways in which you've developed personally (certifications you've earned, classes you've taken, leadership positions you've held, etc.); or
 - Instances in which you or your team went above and beyond expectations in areas outside your assigned areas to produce a notable result.]

Goals for the Next Year

- [It may be a good idea to provide a preview of your goals for the upcoming year in the context of recent accomplishments.
- This would be a good space to provide 3 or 4 ambitious but accomplishable goals aligned with your organization's strategic objectives.]