



CONQUERING



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NORTHERN CALIFORNIA  
— 2023 CACM —  
LAW SEMINAR & EXPO

# The Secret of My Success

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**2023 NORTHERN CALIFORNIA LAW SEMINAR & EXPO**

# Session Outcomes & Takeaways

At the conclusion of this session, attendees will:

- Know their scope as manager
  - Recognize their own limitations and when it's time to seek legal counsel, technical expertise, or professional assistance.
  - Be aware of the additional resources available to support them.



# Session Outcomes & Takeaways (CONTINUED)

- Identify the soft skills needed to be efficient and effective in that role.
- Understand best practices and how to apply them to one's work.
- Develop techniques to manage stress and establish reasonable boundaries.
- Learn how to apply the lessons from past mistakes to ensure future success.



# The Role of the Manager

- To know your role, you must first understand your contract:
  - Importance of staying within your scope.
  - Why is this easier said than done?
    - Managers are people pleasers by nature.
    - Especially challenging for new managers to say “no”.
    - The scope is not always black and white.

# Soft Skills of a Successful Community Manager

- Organizational skills to manage what's on your plate.
- Communication, including active listening and body language, to engage in meaningful dialogue.
- Prioritization to understand where your time is needed most.
- Conflict resolution to build relationships and trust.



# Soft Skills of a Successful Community Manager (CONTINUED)

- Interpersonal skills to serve as the basis for developing and growing a network.
- Confidence to communicate one's needs and establish boundaries.
- Resourcefulness to identify solutions or obtain assistance when challenged.
- A “can-do” attitude to overcome challenges with grace.

# Best Practices to Promote Managerial Success

- Do not create an expectation you cannot continue to meet.
  - Similarly, do not create expectations that a colleague would be unable to meet in the event of the account transition.
- It's better to say, "let me look into it" and conduct due diligence than jeopardize credibility.
  - Similarly, know when it's time to get legal advice.

# Tips to Manage Stress & Establish Reasonable Boundaries

- Developing work-life balance (does it exist?)
  - Unsustainable work habits often lead to burnout.
  - Tips to improve this balance:
    - Out-of-office replies and delayed delivery options.
    - Keep an open dialogue with supervisors.
    - Don't agree to take on extra tasks that can wait or are not necessary.

# Tips to Manage Stress & Establish Reasonable Boundaries (CONTINUED)

- The need for such balance is greater than ever with many managers now working from home either part-time or in full since the pandemic.

# Tips to Manage Stress & Establish Reasonable Boundaries (CONTINUED)

- Find what works best for you.
  - Working from home can pose additional challenges for managers that benefit from a more structured work environment.
  - Organize tasks and “work hacks”.

# Tips to Manage Stress & Establish Reasonable Boundaries (CONTINUED)

- Develop a self-care routine.
  - Your workplace success should not be at the expense of your health.
- Identify areas of improvement and determine what can be done better.



# Recognize Your Limits & When to Get Help

- At what point should a manager engage the help of an expert?
  - Technical maintenance matters and scope development.
  - Legal counsel and advice.
  - Other Experts (acoustical engineers, insurance agents, collection attorneys).
- Know when to delegate and engage the help of your team.

# Recognize Your Limits & When to Get Help (CONTINUED)

- What can a manager do if their board refuses to pay for legal counsel or the help of an outside expert?
  - Board may lose protection under the “Business Judgment Rule”.
  - Obligations under Duty of Care.

# Additional Resources to Support Managers

- Educational courses
- Industry events, luncheon, and tradeshow
- Industry Directories/ CACM Resource Guide
- Your fellow managers
- The website of your Association's legal counsel
- Some management companies offer in-house counsel for legal advice



# How to Learn from Our (and Other's) Mistakes

- Common pitfalls among struggling managers.
  - What can we learn from their mistakes?
- Habits of successful managers.
  - What can we learn from their success?



# How to Learn from Our (and Other's) Mistakes (CONTINUED)

- Personal observations and experiences of panelists.



# Questions?





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