



## Mentoring Plan Template In-House Lawyers

**NOTE: If you wish to delete activities or to add activities not listed, simply confirm with CAMP or with your Sponsoring Program facilitator, especially if you plan to apply for CLE Credit Certification.**

### 1. Initial Planning Meeting, Personal and Professional Development (complete all)

Action	Mark completed items
Meet at the mentor’s office (where practicable) to prepare the customized mentoring plan based on the Mentee’s needs and interests. Discuss best communication methods for each attorney, and consider scheduling all remaining meetings/activities for the mentoring term.	
In tailoring the mentoring plan to the Mentee’s interests, discuss long-term career goals and identify ways to achieve them.	
The mentor should introduce the Mentee to the office’s attorneys and staff (if not already done).	
Include in the meeting professional identity discussion, including discussion about inclusiveness and diversity, work-life balance, mental health and substance abuse issues facing lawyers, and the services available to attorneys regarding these health issues.	
Attend a meeting of an organized bar association or other attorney networking event together. Introduce the Mentee to other attorneys in attendance. Discuss the advantages of bar association involvement and discuss the many local, state, and national associations available, including any in the Mentees specific practice area.	
Add Other	

### 2. The Basics of In-house Practice (complete at least one)

Action	Mark completed items
Review corporate history, structure and business model	
Meet executives or directors to know the corporate players	
Discuss corporate decision making models and general counsel roles	
Discuss development of a legal position for the corporate environment	
Substitute Other	

### 3. History and Importance of the Legal Profession

It is envisioned that this component of the Mentoring Plan should be creatively tailored for the Participating Organization’s Mentoring Program or the individual Mentoring Plan (if not connected to a Participating Organization).

**4. Colorado Rules of Professional Conduct, Professionalism, and Civility**

Action	Mark completed items
<b>Required</b> (to be completed with the activity elected from list below)	
<b>Who exactly is the “Client”?</b> <ul style="list-style-type: none"> <li>• The Corporate Entity</li> <li>• The Shareholders</li> <li>• The Board of Directors</li> <li>• The Executive Management</li> <li>• The Law</li> </ul>	
<b>Internal Investigations</b> <ul style="list-style-type: none"> <li>• Conflicts</li> <li>• Confidentiality</li> </ul>	
<b>Protecting Corporate Confidentiality</b> <ul style="list-style-type: none"> <li>• Attorney-Client Privileged Communications</li> <li>• Attorney Work Product</li> </ul>	
Substitute Other	
Substitute Other	

**5. In-House Practice Mechanics**

Action	Mark completed items
<b>Required</b> (to be completed with the activity elected from list below)	
<b>Complete at least three of the following:</b>	
<b>Working with In-house Clients:</b> <ul style="list-style-type: none"> <li>• Operations and Business Development <ul style="list-style-type: none"> <li>○ Avoiding Over-lawyering</li> <li>○ Avoiding Under-Lawyering</li> </ul> </li> <li>• Human Resources <ul style="list-style-type: none"> <li>○ The HR Manual</li> <li>○ Benefits (ERISA)</li> <li>○ Wage and Hour Laws (FLSA)</li> <li>○ Employment Agreements</li> <li>○ Harassment</li> </ul> </li> <li>• Sales and Marketing <ul style="list-style-type: none"> <li>○ Form Agreements</li> <li>○ Contract Negotiations <ul style="list-style-type: none"> <li>▪ Negotiating from the Middle</li> <li>▪ Contracts Management and Training</li> </ul> </li> <li>○ Export/Import Regs</li> <li>○ News Releases</li> </ul> </li> </ul>	

<p><b>Finance</b></p> <ul style="list-style-type: none"> <li>• The Annual Audit</li> <li>• Banking and Finances</li> <li>• Risk Management</li> <li>• Real Estate</li> <li>• News Releases</li> </ul>	
<p><b>Intellectual Property</b></p> <ul style="list-style-type: none"> <li>• Perfection</li> <li>• Protection</li> <li>• Developing a practical IP Strategy</li> </ul>	
<p><b>Senior Management -- Executive Management Team (EMT)</b></p> <ul style="list-style-type: none"> <li>• President and CEO</li> <li>• Staff Meetings</li> <li>• Building Credibility</li> <li>• Business Advice vs. Legal Advice</li> <li>• Signature Authorities</li> <li>• Leading a Cross-Disciplinary Negotiating Team</li> <li>• Handling the Difficult In-house Client</li> </ul>	
<p><b>Corporate Responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Document Retention/Destruction</li> <li>• Regulatory Compliance Programs</li> <li>• Intellectual Property <ul style="list-style-type: none"> <li>○ The Patent Program</li> <li>○ Trade Secret Protection</li> <li>○ Trademarks and Copyright</li> </ul> </li> </ul>	
<p><b>Corporate Governance:</b></p> <ul style="list-style-type: none"> <li>• Board and Shareholder Meetings</li> <li>• Board Committees and Their Charters</li> <li>• Maintaining the Minute Books</li> <li>• D&amp;O Insurance</li> <li>• Working with the Audit Team</li> </ul>	
<p><b>Litigation</b></p> <ul style="list-style-type: none"> <li>• Selecting Outside Counsel <ul style="list-style-type: none"> <li>○ Budgeting</li> <li>○ Billing Practices</li> <li>○ Involvement</li> <li>○ Coordination and Control</li> </ul> </li> <li>• Establishing a Trial Calendar</li> <li>• Keeping Management and the Board Informed</li> <li>• Discovery and Pleadings</li> <li>• Court Filings and Appearances</li> <li>• Mediation and Arbitration</li> </ul>	
<p>Substitute Other</p>	
<p>Substitute Other</p>	

**6. Office Management and In-Office Procedures**

Action	Mark completed items
<b>Required (to be completed with the activity elected from list below)</b>	
<b>Complete at least one of the following:</b>	
Discuss role and responsibilities of paralegals, secretaries and other office personnel, and how to establish good working relationships with others in the same office who are support staff, colleagues or senior partners. Discuss the “care and feeding” of support staff.	
Discuss practices to maintain client confidentiality.	
Discuss good time management skills and techniques.	
Discuss how to screen for, recognize, and avoid conflicts.	
Discuss how to prevent issues of unauthorized practice of law with staff.	
Discuss office politics, including appropriate networking, socializing, and personal behaviors.	
Discuss the issues surrounding leaving an in-house legal department, such as how to protect oneself and withdrawing from cases.	
Discuss evaluation and compensation procedures, and professional advancement within an in-house legal department.	
Substitute Other	
Substitute Other	

**7. In- House Client Communication (Complete at least one)**

Action	Mark completed items
Discuss importance of client communication, how to maintain appropriate ongoing communication (returning telephone calls, email) to keep clients informed, including use of fee agreements, timeliness, written communication, etc.	
Discuss proper legal counseling, including the duties and responsibilities of advising clients and the respective responsibilities of the client and the lawyer in decision-making.	
Substitute Other	
Substitute Other	

**8. Public Service (Complete at least one)**

Action	Mark completed items
Acquaint the Mentee with legal aid programs, local pro bono programs, and other opportunities for engaging in pro bono activities and civic and charitable work. Discuss the reasons for making time to engage in volunteer legal service to the public and any impediments to undertaking such work.	

Mentee attends a civic club of which the mentor is a member or some other community service activity in which the mentor participates. Discuss the reasons for making time to engage in volunteer legal service to the public.	
The pair participates in a bar-sponsored or other volunteer program aimed at delivering legal services to the public. Discuss the reasons for making time to engage in volunteer legal service to the public.	
Substitute Other	