



## Mentoring Plan For 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

Action	Mark completed items
<b>Required (Complete at all)</b>	
Meet at together in person (where practical) to prepare the customized mentoring plan based on the Mentee’s needs and interests. Utilize the CAMP <a href="#">Initial Goal Plan &amp; Meeting Guide</a> to assist your mentoring pair in developing goals for the mentoring relationship. Discuss best communication methods for each lawyer 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.	
Professional Growth: <ul style="list-style-type: none"> <li>- Selecting, Developing &amp; Establishing Personal Areas of Legal Expertise</li> <li>- The Importance of CLE</li> <li>- Creating &amp; Developing a New Legal Position</li> <li>- When Is It Time to Move On (?)</li> </ul>	

### 2. The Basics of In-house Practice

Action	Mark completed items
<b>Required (Complete at least one)</b>	
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	
Reporting to a Non-Lawyer: <ul style="list-style-type: none"> <li>• Periodic communications and reports</li> <li>• Ad Hoc communications</li> <li>• Annual Reviews &amp; Long Term Objectives</li> </ul>	
Substitute Other	

**3. Developing Professional Identity & Lawyer Well-Being (complete at least two)**

Action	Mark completed items
<p>It is envisioned that this component of the Mentoring Plan should be creatively tailored for the individual mentee’s needs. The discussion should focus on understanding “why” the mentee chose the profession of law and what the mentee seeks to accomplish in their professional role.</p> <ul style="list-style-type: none"> <li>• How does the mentee define “professional success” and whose input/feedback did they utilize in developing this definition?</li> <li>• What characteristics, skills, and attributes does the mentee have that will allow them to find professional success?</li> <li>• Who are the people in the mentee’s personal and professional community who will support them in finding professional success?</li> </ul> <p>Assist the mentee in articulating their “Professional Identity” as a lawyer. Utilize John Bliss, <i>The Professional Identity Formation of Lawyers, The Practice</i> (March/April 2016). <a href="https://thepractice.law.harvard.edu/article/the-professional-identity-formation-of-lawyers/">https://thepractice.law.harvard.edu/article/the-professional-identity-formation-of-lawyers/</a> to assist your mentoring pair in facilitating this discussion.</p>	

<p>Engage Mentee in a self-reflective exercise to determine whether Mentee believes they are thriving in all dimensions of “well-being” including:</p> <p><b>Emotional:</b> Recognizing the importance of emotions. Developing the ability to identify and manage our own emotions to support mental health, achieve goals, and inform decision-making. Seeking help for mental health when needed.</p> <p><b>Occupational:</b> Cultivating personal satisfaction, growth, and enrichment in work; financial stability.</p> <p><b>Intellectual:</b> Engaging in continuous learning and the pursuit of creative or intellectually challenging activities that foster ongoing development, monitoring cognitive wellness.</p> <p><b>Spiritual:</b> Developing a sense of meaningfulness and purpose in all aspects of life.</p> <p><b>Social:</b> Developing a sense of connection, belonging, and a well-developed support network while also contributing to our groups and communities.</p> <p><b>Physical:</b> Striving for regular physical activity, proper diet and nutrition, sufficient sleep, and recovery; minimizing the use of addictive substances; seeking help for physical health when needed.</p> <p>Assist Mentee in developing well-being objectives and a plan to address Mentee’s self-identified deficiencies in these dimensions of well-being. Consider the <a href="#">ABA Well-Being Toolkit for Lawyers and Legal Employers</a> in building a well-being action plan.</p>	
<p>Engage the Mentee in a reflective exercise regarding resilience. How does the Mentee assess their own resiliency? What factors account for the Mentee’s measurement of resilience? Assist Mentee in developing a plan to improve their resiliency. Consider the following resources:</p> <ul style="list-style-type: none"> <li>• <a href="#">Three Ways Lawyers Can Become More Resilient</a></li> <li>• <a href="#">Survival Skill No. 1 for Lawyers: Emotional Resilience</a></li> </ul>	

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

Action	Mark completed items
<b>Required (Complete at least two)</b>	
<p><b>Who exactly is the “Client”?</b></p> <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>	
<p><b>Internal Investigations</b></p> <ul style="list-style-type: none"> <li>• Conflicts</li> <li>• Confidentiality</li> </ul>	
<p><b>Protecting Corporate Confidentiality</b></p> <ul style="list-style-type: none"> <li>• Attorney-Client Privileged Communications</li> <li>• Attorney Work Product</li> </ul>	

<p><b>The “Proper Use Guidelines”</b></p> <ul style="list-style-type: none"> <li>• For Electronic Communications</li> <li>• For Use of Company Computers and Internet Access</li> </ul> <p><b>The “Business Conduct Guidelines”</b></p> <ul style="list-style-type: none"> <li>• Developing and Drafting</li> <li>• Promulgation and Implementation</li> <li>• Enforcement and Updating</li> </ul>	
Substitute Other	

**5. Transactional Experiences**

Action	Mark completed items
<b>Required (Complete at least two)</b>	
Discuss types of alternative dispute resolution (ADR) such as mediation, arbitration, early neutral evaluation, summary jury trials, collaborative law practice.	
Mentee attends one of the ADR proceedings listed above (collaborative law practice). The pair discusses and evaluates what was observed.	
Mentee attends or participates in a negotiation. The pair discusses and evaluates what was observed.	
Mentee attends or participates in an appellate oral argument before the Colorado Supreme Court, Colorado Court of Appeals, or the Tenth Circuit Court of Appeals. The pair discusses and evaluates what was observed.	
Mentee attends or participates in a hearing conducted by a state or local administrative body (e.g. local zoning board, tax equalization board hearing; state licensing or regulatory body). The pair discusses and evaluates what was observed.	
Mentee observes a real estate closing or other business transaction or financial closing. The pair discusses and evaluates what was observed.	
Mentee attends or participates in a planning/strategy meeting regarding a business transaction or estate planning. The pair discusses and evaluates what was observed.	
Mentee reviews transactional real estate documents and the pair discusses important terms and practices, including the implications of certain language.	
Mentee attends a real property closing. The pair discusses and evaluates what was observed.	

**6. In-House Practice Mechanics**

Action	Mark completed items
<b>Required (Complete at least three)</b>	
<p><b>Working with In-house Clients:</b></p> <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               <ul style="list-style-type: none"> <li>○ Being someone's "Personal GC"</li> <li>○ Being Ignored or Bypassed</li> <li>○ Being Undermined</li> </ul> </li> </ul>	

<p><b>Corporate Responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Document Retention/Destruction</li> <li>• Regulatory Compliance Programs <ul style="list-style-type: none"> <li>○ Employment &amp; Labor Laws</li> <li>○ SEC Regulations</li> <li>○ Import –Export Regulations</li> <li>○ Environmental Regulations</li> <li>○ Government Contracts</li> </ul> </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>	
Substitute Other	
Substitute Other	

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

Action	Mark completed items
<b>Required (Complete at least two)</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	

## 8. In- House Client Communication

Action	Mark completed items
<b>Required (Complete at least one)</b>	
Review the Colorado Principles of Professionalism <a href="https://www.cobar.org/For-Members/Committees/Professionalism-Coordinating-Council/Principles-of-Professionalism">https://www.cobar.org/For-Members/Committees/Professionalism-Coordinating-Council/Principles-of-Professionalism</a> as a pair and select at least three principles for further discussion as to their application to the mentee’s practice of law with in-house clients.	
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. <ul style="list-style-type: none"> <li>• Consider the following resources in your discussion: <ul style="list-style-type: none"> <li>○ <a href="#">Do You Have a Client Centered Law Practice?, Sullivan, 2016</a></li> <li>○ <a href="#">The Lawyer As the Counselor, Burtch, 2010</a></li> <li>○ <a href="#">Who is My Client? Client Centered Lawyering With Multiple Clients, Lawton, 2015</a></li> </ul> </li> </ul>	
Substitute Other	
Substitute Other	

## 9. Public Service

Action	Mark completed items
<b>Required (Complete at least one)</b>	
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.	

<p>Discuss Pro Bono Activities for In-house Counsel specifically, including:</p> <ul style="list-style-type: none"><li>• Selection and Involvement</li><li>• Corporate Support</li><li>• Added Liability</li></ul>	
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