



Mentoring Plan Template for “Transitioning Practice Areas”

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 practical) 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 firm’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.	

2. The Colorado Bar and Legal Community (complete at least one)

Action	Mark completed items
Attend a meeting of an organized bar association or other attorney networking event together, specifically a section meeting in the lawyer’s new or intended practice area. 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 Mentee’s specific practice area.	
Meet at the local courthouse(s), particularly the one in which the Mentee may be appearing, and make introductions to members of the judiciary, court personnel, and clerks of court. Discuss customary rules of civility or etiquette in court and among lawyers and judges in the community.	

3. History and Importance of the Legal Profession

Discuss the “plasticity” of a law degree. For years, law schools have argued that you can do anything with a law degree. Is this notion really true? How does the flexibility of a law degree shape the legal profession as a whole? Has the profession become too transient? What are the benefits to a more malleable legal profession?

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

Action	Mark completed items
Required (to be completed with the activity elected from list below)	
The pair should discuss: <ol style="list-style-type: none"> 1. The distinction between the Colorado RPC and professionalism 2. The attorney’s obligations to the court, the client, and opposing counsel in transitioning firms or practice 3. Common ethical issues and resources for how to resolve difficult ethical questions arising from engaging in a new practice area or field 4. Common grievance and malpractice “traps” and how to avoid them 5. The role of professionalism and the Colorado RPC in public interest policy development 	
Complete at least one of the following:	
Discuss how to screen for, recognize, and avoid taking on representation for which you are not competent to handle.	
Discuss how to prepare yourself and your new practice to avoid common malpractice and disciplinary pitfalls which arise during times of transition and learning for attorneys.	
Discuss appropriate ways to handle situations where a lawyer believes another lawyer has committed an ethical violation or otherwise acted unprofessionally or uncivilly; the obligation to report misconduct; and the appropriate way to handle a situation where the Mentee is asked by a senior member of the firm/organization to do something that is unethical or unprofessional.	
Discuss the grievance process and a lawyer’s duty to cooperate with a disciplinary investigation.	

5. Surviving Transition (complete at least two)

Action	Mark completed items
<p>THE CARROT</p> <p>One of the most important factors to assess is the “carrot.” What are your needs? What draws you away from your current practice of law and how deeply does it excite your interest? What does the mentee envision themselves doing other than their current practice, or who is someone who has the job they think they would like to have?</p> <p>Use the “carrots” to help guide the mentee into practice areas or jobs that are better matches for their personalities.</p>	
<p>THE STICK</p> <p>Another important factor is the “stick.” The stick is whatever it is you are trying to get away from in your current work world. Your stick might be a difficult partner, the stress of trial work, demanding clients, or a poisonous work environment.</p> <p>But what if you never liked the practice of law at all? What if you became an attorney to please your parents, for example? Many attorneys enter the field because they are urged to do so by well-meaning significant people in their lives. What if you are living out someone else’s dream? That is a stick with greater weight. Discuss the mentee’s “stick” in an effort to help the mentee make better understand why they are seeking change and whether the transition will truly help them obtain their carrot.</p>	
GRIT	

<p>Next, there are a group of personality traits that indicate you have the motivation and tenacity to make a career transition. These traits include initiative, creativity, flexibility, endurance, and perseverance. These are the ingredients that compose what we call “grit.” Discuss with the mentee how hard they are willing to work to accomplish their goals and what personality traits they will invoke to find success.</p>	
<p>ECONOMIC REALITY Another factor that must be assessed is your economic situation. Help the mentee to explore, evaluate, and rank their priorities. Use those priorities to help the mentee establish short and long term professional goals. Career transitions require a delicate balance of maintaining economic stability and while moving toward achieving professional goals. Discuss with the mentee how the economic realities of their situation inform their career transition.</p>	
<p>EFFECTIVE OPPORTUNITY DEVELOPMENT The last key piece to a successful career transition has to do with understanding and utilizing information about how to effectively develop opportunities and jobs.</p> <p>It is important to be prepared to have well-scripted, small vetting meetings with multiple people in the industry or practice area the mentee is trying to move into. The goal is to become known and trusted by people who are already in the industry or practice area; this is an effective way to become the “insider who gets hired.” Such an approach opens doors and develops potential jobs and other opportunities for the job-seeker.</p> <p>The focus is on learning about the industry and developing knowledge about what is happening on-the-ground, finding people already doing the work you would like to be doing, and learning from them. The focus is also on doing research so that you know the places where your skills could be useful and valuable, and articulating your value in these vetting meetings. Since more magic happens in person, discuss with the mentee how to engineer their luck by identifying people who are well positioned in the field and understanding how to connect with them in person if possible.</p>	

6. Transitioning to an In-House Position (complete at least two)

Action	Mark completed items
<p>COMMUNICATION Learning to “think like a lawyer” includes learning to speak like a lawyer. While argumentative writing and communication may get you praise in the legal world, it can backfire in the business world. Discuss with the mentee how communication in the legal world differs from communication in the business world. Include in your discussion an analysis of the formality of communication in each world and communicating in a limiting manner (legal world) versus a manner that inspires more openness to possibilities that exist (business world).</p>	
<p>RELEGATED TO RISK MANAGEMENT At times, the business world can only view attorneys through the lens of risk manager. As a result, lawyers transitioning into the business world may be relegated to positions in risk management and policy development. Discuss how the mentee will overcome the potential for pigeonholing lawyers in the business world, including how the development of the mentee’s professional identity can assist them in selling themselves as more than a risk manager.</p>	
<p>BUILDING FINANCIAL, SALES, & OPERATIONAL SKILLS General counsel today bring more to the table than just their legal expertise. Acting increasingly as legal and business advisors to the CEO and senior leadership team, general counsel draw upon broader business knowledge and a wider skill set. Having the legal pedigree</p>	

<p>is a given. Differentiation comes from being, in the words of one general counsel, “more than just a lawyer.”</p> <p>To truly distinguish themselves, however, legal executives must develop other attributes, such as greater knowledge of the business. The more attorneys know or learn about an industry, the better they perform as legal and business advisors; they then can advise a company in the context of the business issue and are not merely dispensing pure legal advice. Further, lawyers’ overall job performance improves with increased financial acumen, following a track similar to that of corporate administration/executives. The best-in-class general counsel is a fully functioning member of the senior leadership team who “just happens to be an attorney.”</p> <p>Discuss with the mentee how to intentionally seek out opportunities to build their business and financial knowledge and skills to become an in-house attorney who is more than just a lawyer. Include in your discussion an analysis of the mentee’s current strengths and weaknesses as it pertains to business and financial knowledge and how to leverage the strengths and improve upon the areas of weakness.</p>	
<p>PASSION</p> <p>What separates successful business leaders and entrepreneurs from the pack is an inner drive and passion for what they are doing. The business world expects passion and innovation from all who engage with it. As general counsel, you have the ear of business leaders. They will expect you to share in their passion for the work you are doing and to utilize that passion to bring success to the business and to yourself. Discuss with the mentee their passions related to in-house, corporate work. Include in your discussion whether the mentee’s inner drive is related to a specific industry area and how the mentee will sustain his or her long term passion for the work, even during difficult professional experiences. How will the mentee know if or when it is time to change direction or seek different opportunities? How does the mentee’s passion for this type of work inform the development of his or her professional identity as an in-house lawyer?</p>	
<p>LEVERAGING LEGAL BACKGROUND</p> <p>A law degree can give attorney-business leaders confidence to stick with decisions, even in the face of potential litigation. Other business leaders might find it difficult to make similar decisions because of today’s litigious business environment. General counsel never take off their legal hats. Their thinking, however, should be broader than purely legal matters to consider the longer-term implications of a transaction, litigation, or other corporate matter. In fact, there are times when general counsel think more about the impact on the business over time than a short-term legal strategy. If they display broader thinking, general counsel can dispel the perception that having a law degree means they are only interested in legal issues. Instead, legal talent is recognized for being business minded.</p> <p>Discuss with the mentee how to leverage their legal background to take a long-term, broad based approach to advising their in-house clients. Include in your discussion an analysis of ways in which the mentee can find opportunities to learn more about the enterprise and the industry by seeking out new challenges that allow them to see the bigger picture. For instance, joining cross-functional teams, even for one project or as part of an in-house task force.</p>	

7. Improve Resiliency & Emotional Intelligence (Complete at least one)

Action	Mark completed items
<p>Stress, long hours, uncertainty, and the pressure to be on 24/7 are part of the everyday life of a lawyer. Because of this lifestyle, it is critical for lawyers to develop resilience to bounce back from and grow and thrive during challenge, change, and stress. Discuss with the mentee the ways in which the mentee engages in self-care to support themselves during times of change and challenge. Include in your discussion an assessment of the mentee’s level of resilience: ability to overcome professional and personal negative issues or setbacks.</p>	
<p>According to clinical psychologist and resilience researcher George Bonanno, a central element of resilience is perception—how you perceive stress, challenge, and adversity directly influences how you will respond to any stress trigger. When lawyers think that they have the resources to deal with a stressor, they are more likely to view stress or adversity as a challenge; conversely, when lawyers perceive their resources to be lacking under stress, they may view stress as a threat. In fact, having a rigid, inflexible response to stress, change and adversity can lead to the following:</p> <ul style="list-style-type: none"> ▪ Increased errors and missing information and deadlines ▪ A “protect my turf” mentality ▪ Diminished collaboration and cooperation ▪ More stress ▪ Poorer work quality ▪ Reduced collegiality and even an increase in incivility ▪ Survival-based emotions and reactions like impatience, defensiveness, and hyper-criticality <p>Discuss with the mentee what resources they have to deal with the stress of transition and how they can engage with these resources during times of professional stress. Include in your discussion ways in which the mentee can assess whether they are effectively utilizing their resources.</p>	
<p>A major transition in practice usually involves having to approach new people in unfamiliar situations. Whether it is navigating a new section of the bar, a new cohort of opposing counsel, or a new law firm, government office, or company setting, it is important for all transitioning attorneys to be conscious of their emotional intelligence.</p> <p>Emotional intelligence is the awareness of one's own emotions and the emotions of others. Basically, we live and work in the presence of others, and our success shouldn't be based just on how smart we are, but also on how we interact with others.</p> <p>As ABA's <i>Law Practice</i> magazine observed in 2007, "Studies at Harvard and elsewhere have shown that high IQ does not necessarily translate into high productivity, while the ability to 'get along with people' has been found to be more critical than intelligence, decisiveness or job expertise in achieving bottom-line results." Makes sense, right? Would you really want to work with someone who's smart, but tactless and cold?</p> <p>Problems can often be solved even before they start with a little bit of massaging and the "counselor" part of being a lawyer. Discuss with the mentee the personality traits they embody that both help and hurt their emotional intelligence quotient. Include in your discussion of how the mentee can improve upon their “EQ” in the next phase of their practice.</p> <p>Related Resources:</p> <p>Three Important Questions About Lawyers, Emotional Intelligence, Professionalism, and Continuing Legal Education (Psychlawlogy): http://www.psycholawlogy.com/2014/12/03/three-important-questions-lawyers-emotional-</p>	

<p>intelligence-professionalism-continuing-legal-education/</p> <p>The Emotional Path to Success (Harvard Magazine): http://www.harvardmagazine.com/1998/09/path.html</p> <p>Emotional Intelligence: How to Find It in Prospective Associates (FindLaw's Strategist): http://blogs.findlaw.com/strategist/2014/04/emotional-intelligence-how-to-find-it-in-prospective-employees.html</p> <p>Lawyer Yogis Share Relaxation, Mindfulness Tips in 'Yoga for Lawyers' (FindLaw's Strategist): http://blogs.findlaw.com/strategist/2014/08/lawyer-yogis-share-relaxation-mindfulness-tips-in-yoga-for-lawyers.html</p>	
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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.	