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The Law Society of Upper Canada
Barreau du Haut-Canada

Advancing into Partnership

Agenda for Law Firm In-House Program

Program length: 2 hours

This program, if delivered as is, would be accredited for the following hours:

Total CPD = **1.0** Substantive Hours + **1.0** Professionalism Hour (15 minutes for the work/life balance session and 45 minutes for the mentoring session).

Target Audience: Law firm associates (both male and female)

Goals of the program: introduce the tools contained in the Law Society's *Career Advancement into Partnership: Associate Guide* (the "Guide") and show how these tools can help associates advance their careers through concrete career plans, profile-building, and effective mentoring.

Professionalism topics

The program is structured to build on the practical tools in the *Career Advancement into Partnership: Associate Guide*. Men and women will be encouraged to attend, and the program will refer to gender perspectives where relevant. Partners who mentor these associates should also attend.

The program will help associates learn how to use the Guide's tools to effectively plan their careers, build their practices and profiles, enhance their client service, engage their mentors, and manage their work and personal lives. The program will address the following professionalism topics:

- "Career and profile management in the legal profession" - Associates will learn how to use the Guide to assess their own practice, to identify strategies to leverage and build their skills and increase their ability to manage work/life balance.
- "Career and profile management in the legal profession" - The program will show associates how to use the Guide to develop a workable career plan that takes into account their priorities and also focuses on providing high quality services to clients, building client relationships, and developing their internal and external profiles.
- "Mentoring best practices for lawyers" – The program and the Guide will show associates how to engage their mentors in helping them develop their career plans and achieving their practice goals.

- “Work/life balance and wellness strategies for lawyers” – The program and the Guide will also help associates assess what it important in their own work and life so they can balance their work/life priorities.

Agenda

Introduction – 10 minutes

- Background on Justicia/Retention of Women Project and resources available for associates
- Overview of the role of gender in career advancement
- Introduction to career plans, their importance and key timing

TOPIC: Using the Guide to Understand Best-Practices to Become a Law Firm Partner – 30 minutes

Professionalism Content – 20 minutes

In this section of the program, associates will learn how to use the Guide to identify best-practices to becoming a law firm partner. The Guide will help them understand:

- What it takes to become a partner (e.g. sustainable practice, financial management skills, commitment and dedication, client management, billable hours, profile in the marketplace, business development, responsibility for or carriage of matters or clients, non-billable activities, leadership and delegation, volunteer activities, strong analytical skills and judgement and legal expertise)
- Firm resources to assist an associate who wishes to become a partner (e.g. making the most of mentoring relationships)

The program will use the Guide to discuss the importance of concrete, written career plans and to show associates how to develop them. In light of the knowledge gained in the above section, associates will discuss how their own planning may help them reach partnership. Before attending the program, associates will be asked to familiarize themselves with their firm’s specific policies on career advancement.

This section of the program highlights the Law Society’s Professional Management Practice Guideline, particularly 6.8.2 Planning, which outlines activities lawyers may wish to engage in to manage change and plan for the future in their practice. In discussing the requirements for partnership, the senior regional partner delivering the program will also touch on the importance of time management and client management, as per the Client Service and Communication Practice Management Guideline and the Time Management Practice Management Guideline.

TOPIC: Best-Practices in Work-Life Balance – Using the Guide to Assess Practice, Skills and Ability to Achieve a Work/Life Balance – 45 minutes

Professionalism Content – 45 minutes

In this session, participants will work together in small groups to do the groundwork necessary for preparing a career plan. By working together associates may overcome the reluctance and hesitation some might otherwise feel when starting to develop a career plan.

- Participants will use the “Practice Audit” checklist in the Guide to discuss best-practices and assess their own practice against the best-practices
- Participants will use the “Personal Audit” checklist in the Guide to assess their own strengths, weaknesses, skills, attitudes, goals and competing life interests
- A newly admitted partner at the firm will be asked to facilitate each group’s discussion, provide information about his or her personal experience, and offer tips and best-practices on how to manage professional responsibilities while maintaining a healthy personal lifestyle
- Each small group will have one person report to the group-at-large and the group will then share ideas and best practices.

This section of the program highlights the Law Society’s Professional Management Practice Guideline, particularly 6.8.2 Planning, which outlines activities lawyers may wish to engage in to manage change and plan for the future in their practice. The session will also highlight the importance of work/life balance and wellness strategies for lawyers and the challenge of managing outside interests and the practice of law, as outlined in the Personal Management Practice Management Guideline.

<u>TOPIC: How to Effectively Cultivate and Use a Mentor/Sponsor Relationship?</u> – 45 minutes

Professionalism content – 45 minutes

In this session, participants and their mentors/sponsors will discuss the following topics (if an associate’s mentor cannot attend, the associate may nevertheless benefit from comments by other mentors):

- What is the difference between a mentor and a sponsor?
- What are the types of mentors/sponsors that would be most helpful to associates? (i.e. personal mentor, career mentor or sponsor)
- How does an associate find a mentor? Does the mentor have to be within the firm?
- How many mentors should an associate have?
- How does an associate approach a prospective mentor?
- What is an associate’s role as a mentee?
- What factors does gender play in mentoring relationships?
- What can a sponsor do for an associate?
- How does an associate use a mentor or sponsor to assist with career advancement into partnership?

This session will highlight mentoring best practices for lawyers, in light of the Professional Management Practice Guideline, which at 6.8.3. emphasize coaching strategies and how associates can benefit from coaching and mentoring. The session also highlights the Law Society’s Professional Management Practice Guideline, particularly 6.8.2. Planning, which outlines activities lawyers may wish to engage in to manage change and plan for the future in their practice.

Conclusion and follow-up

At the end of the workshop, each associate participant will be provided with a template career plan and asked to set a specific date after the program to meet with his or her mentor to work on developing an effective career plan.

Suggested follow-up activities:

- A follow-up workshop to review and discuss the individual career plans associates have prepared (in pairs or small groups) and to address any difficulties associates may have had in preparing them
- A panel discussion with partners at the firm to provide information and tips about their experiences with career advancement into partnership and their experiences as a partner.
- Individual meetings of associates with mentors/sponsors to discuss implementation of their career plans and to agree on a schedule for updating their plans

Facilitators' Guide

The following are tips to assist Facilitators in law firms when delivering the workshop.

1. The *Career Advancement into Partnership: Associate Guide* should be distributed to participants in the workshop in advance, with the agenda for the program.

2. Participants will be asked to refer more particularly to the Career Plan at Appendix 1 of the Guide and the Checklists at Appendix 2 of the Guide. These should be highlighted to participants.

3. The facilitator may wish to distribute Appendix 1 and Appendix 2 of the Guide as loose leafs during the workshop to allow participants to work with the documents.

4. Participants are asked to familiarize themselves with their firm's specific policies on career advancement. The facilitator may wish to provide participants with links to the relevant policies ahead of the workshop.

5. If the facilitator involves partners and/or mentors/sponsors to facilitate the small group discussions, prepare them for the session. They should be provided with the agenda and objective of the session, information about what is expected of them, and the format and content of the session. A pre-workshop meeting with the discussion group facilitators may be advisable.

6. Prepare a power point presentation or a PDF document to present the introduction and the general overview of the action plan and the checklists. A template power point is provided for the introduction about the Justicia project. Facilitators may wish to complete the power point by adding information about other topics covered in the workshop.

7. The facilitator may wish to identify the follow-up activity for the session (e.g. individual meetings with mentors/sponsors, follow-up workshop panel discussion). This activity should be described at the workshop.