



Advancing into Partnership

Template Agenda for Regional Firms Program

Program length: 3 hours

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

Total CPD = **1.5** Substantive Hours + **1.5** Professionalism Hour (30 minutes for the portion of the work/life balance session that deals with best practices and 1 hour for the mentoring session).

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

Goals of the program: To 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*. Both men and to women will be encouraged to attend, and the program will refer to gender perspectives wherever relevant. Where possible, lawyers who are recently admitted to partnerships and mentors should also be invited to participate in the delivery of the program.

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 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 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 is important in their own work and life so they can balance their work/life priorities.

Agenda

Introduction – 10 minutes – Delivered by the Law Society or a senior regional partner

- 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 what is Expected of Law Firm Partners – 30 minutes – delivered by one or more senior regional partner

Professionalism Content – 20 mins

In this section of the program, associates will learn how to use the Guide to help them understand:

- General firm requirements for partnership (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 policies on partnership admission: what are the processes to apply for and be admitted to the partnership? What are the firm differences and what should an associate be aware of?
- Finding the resources to assist an associate who wishes to become a partner
- Responsibilities partners usually have in the management of the firm (e.g. number of committees, expectations for newly admitted partners)
- Structure of the partnership (e.g. how are decisions made, how much does it cost to join)

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 general 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

TOPIC: Using the Guide to Assess your Own Practice, Skills and Ability to Achieve a Work/Life Balance– 1 hour – Facilitated by the Law Society with assistance by newly admitted partners.

Professionalism Content – 1 hour

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. Newly admitted partners at firms will be asked to facilitate each group’s discussion, provide information about his or her personal experience, and offer and tips on how to manage professional responsibilities while maintaining a healthy personal lifestyle.

- Participants will use the “Practice Audit” checklist in the Guide to assess their own practice against the several expectations identified in the checklist
- Participants will use the “Personal Audit” checklist in the Guide to assess their own strengths, weaknesses, skills, attitudes, goals and competing life interests
- 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.

TOPIC: Working with a Mentor/Sponsor to Plan your Career – 1 hour – Facilitated by the Law Society with assistance by regional mentors.

Professionalism Content – 1 hour

In this session, participants and those who provide mentoring in the region will discuss the following topics:

- 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, the facilitator will suggest follow-up activities to participants.

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 or meeting 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.