



Annual Conference & Exposition

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Law School is Only a Starting Point - A Professional Development Strategy

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LI23

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2:45 PM - 4:15 PM

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*Your connection
to knowledge, resources and networking*

ALA Conference
Competency/Skills List of Lawyers by Experience Level

The Sponge Stage (Years 1-3)

- The rules of professional conduct
- Know your limits and when to ask for help
- Teamwork
- The development of a service orientation
- Learn time management
- Attention to quality and detail in work product
- Concentrate on skills development
- Develop your profile within the firm
- Develop your network and become familiar with your client contacts
- Develop industry knowledge
- Understand the concept of effective delegation
- Learn resilience and endurance
- Develop and understanding of your firm's internal business practices, such as billing, time recording, meeting appointments
- Develop a reputation as a problem-solver
- Take ownership of work assignments
- Understand your role and contribution to the team
- Develop your research and writing skills and how to analyze legal problems

Taking Stock of Your Career (Years 4 & 5):

- Develop your delegation and supervision skills
- Develop team and project management skills
- Learn how to run meetings
- Become a mentor to junior professionals
- Start to handle more complex files on your own
- Become more involved in LPM (planning, estimating, staffing) on larger files
- Start to develop distinctive expertise or a niche
- Develop more self-awareness of your career path and engage in effective career planning
- Develop business development skills
- Enhance your profile by writing, presenting and speaking
- Learn how to sell your skills
- Enhance your negotiation skills
- Understand the big picture and develop your risk analysis skills and how to provide big picture advice
- Learn how to manage work and people up and down

Acting like an Owner (Years 6 & 7):

- Become more entrepreneurial in your approach

- Find your place both within the firm and externally within the legal community as a whole
- Refine your delegation and supervision skills
- Master your firm's internal politics
- Take on increasingly important leadership roles
- Seek your own client base
- Think like a profit centre
- Find champions within the firm who will sponsor you for partnership
- Hone your legal and business judgment

Becoming a Trusted Advisor (Partner):

- Master client development
- Master LPM
- Master how to deploy people and develop a cadre of loyal supports and "go to" people
- Develop your EQ
- Develop your business and financial EQ
- Master delegation techniques
- Master the art of mentoring
- Master business pricing, staffing and budgeting
- Develop a training mentality
- Further develop your resilience
- Learn how to become focused and practical
- Market your personal brand to enhance your profile within the broader community
- Attract trust
- Network
- Hone your strategic planning skills for client matters and firm projects
- Learn how to remain agile

Developing Vision (Firm Leader):

- Learn how to become forward looking and anticipate market changes
- Develop your leadership as well as your lawyering skills
- Develop a broader firm perspective
- Look outward more
- Concentrate on developing others and enable them
- Master developing your EQ
- Focus on decision-making and follow through
- Take ownership and responsibility
- Build teams
- Prioritize
- Lead change management

Transitioning to In-house counsel (legal team):

- Manage budgets

- Shift to corporate culture mentality - team
- Manage legal counsel
- Manage competing priorities
- Legal project management
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What New Skills will Tomorrow's Lawyers Need?

- How to innovate
- Understanding IT systems and process improvement
- Ever greater specialization
- Learning how to collaborate with experts in other fields and work with multidisciplinary teams
- Develop more cultural and diversity competence in an increasingly global and connected world
- Develop a 24/7 commitment to your clients and colleagues

Developed by the CBA Futures initiative team looking at legal education and training in collaboration with the Toronto Professional Development Consortium.

SAMPLE INTERNAL LEARNING OPPORTUNITIES

BMO's Legal, Corporate and Compliance Group's (LCCG) Learning Series events are seminars with a focus on emerging enterprise and banking issues. Each presentation is custom to BMO's particular position on an issue. Substantive legal issues and relevant practice skills are included. All LCCG members are welcome to attend in person or via live WebEx. The below is a snapshot of 4 months of the annual Learning Series delivery. Upcoming Learning Series seminars are posted on an internal Professional Development Portal and members can register (with a calendar entry function) on-line.

| JANUARY | LOCATION |
|--|-----------------|
| Regulatory Effectiveness: The Regulator and You | Toronto/Chicago |
| Plain Writing Workshop [professionalism credit] | Toronto |
| Plain Writing Workshop [professionalism credit] | Chicago |
| Customer Conversations: Delivering Responsive Customer Service | Toronto |
| Customer Conversations: Dealing with Difficult Customers | Toronto |
| Dodd Frank Update | Toronto/Chicago |
| FEBRUARY | |
| Customer Conversations: Telephone Etiquette | Toronto |
| Future of Compliance Roundtable | Toronto |
| MARCH | |
| Customer Conversations: Responsive Customer Service | Chicago |
| What it means to be a Bank Holding Company | Chicago |
| US Broker-Dealer Regulatory Review | NYC |
| US Litigation Trends | Chicago |
| Privacy Law in Canada | Toronto |
| Internal Investigations | Chicago |
| APRIL | |
| US Affordable Health Care Act | Webex |
| Effective Leadership: Developing Emotional intelligence and Resilience | Toronto |
| Special Damages in Employment Claims | Toronto |
| Hot topics in Legal Privilege | Chicago |
| DISC: Communication Training [professionalism credit] | Toronto |
| Key Regulations: Insider Trading | Toronto |

BMO's LCCG also partners with the BMO Institute for Learning (IFL) to deliver non-legal, but relevant, orientation, ongoing development and leadership learning opportunities. These courses are offered on an enterprise-wide basis and are delivered at the IFL campuses in Toronto and Chicago. The below is a sample of the IFL offerings the LCCG has offered all, or targeted, members.

| INSTITUTE FOR LEARNING COURSE | OFFERED TO |
|--|------------------------------|
| Leaders Orientation to BMO Financial Group | All new LCCG senior managers |
| Orientation to BMO Financial Group | Targeted LCCG members |
| Understanding our Business | All LCCG Members |
| Leadership Development Program (LDP) | Targeted middle managers |
| Senior Leadership Development Program (SLDP) | Targeted senior managers |
| Advanced Leadership Program (ALP) | Targeted emerging leaders |

BMO's LCCG also partners with the IFL (or other learning providers/vendors) to develop new and bespoke programs for its members.

| INSTITUTE FOR LEARNING COURSE | OFFERED TO |
|---|------------------------------|
| Internal Investigations at BMO (2 day) – <i>in development</i> | Corporate Security members |
| Key Regulations Training (virtual delivery) – <i>in development</i> | Compliance and LOB employees |
| Business Unit Compliance Officer (BUCO) Essentials | Compliance and LOB employees |

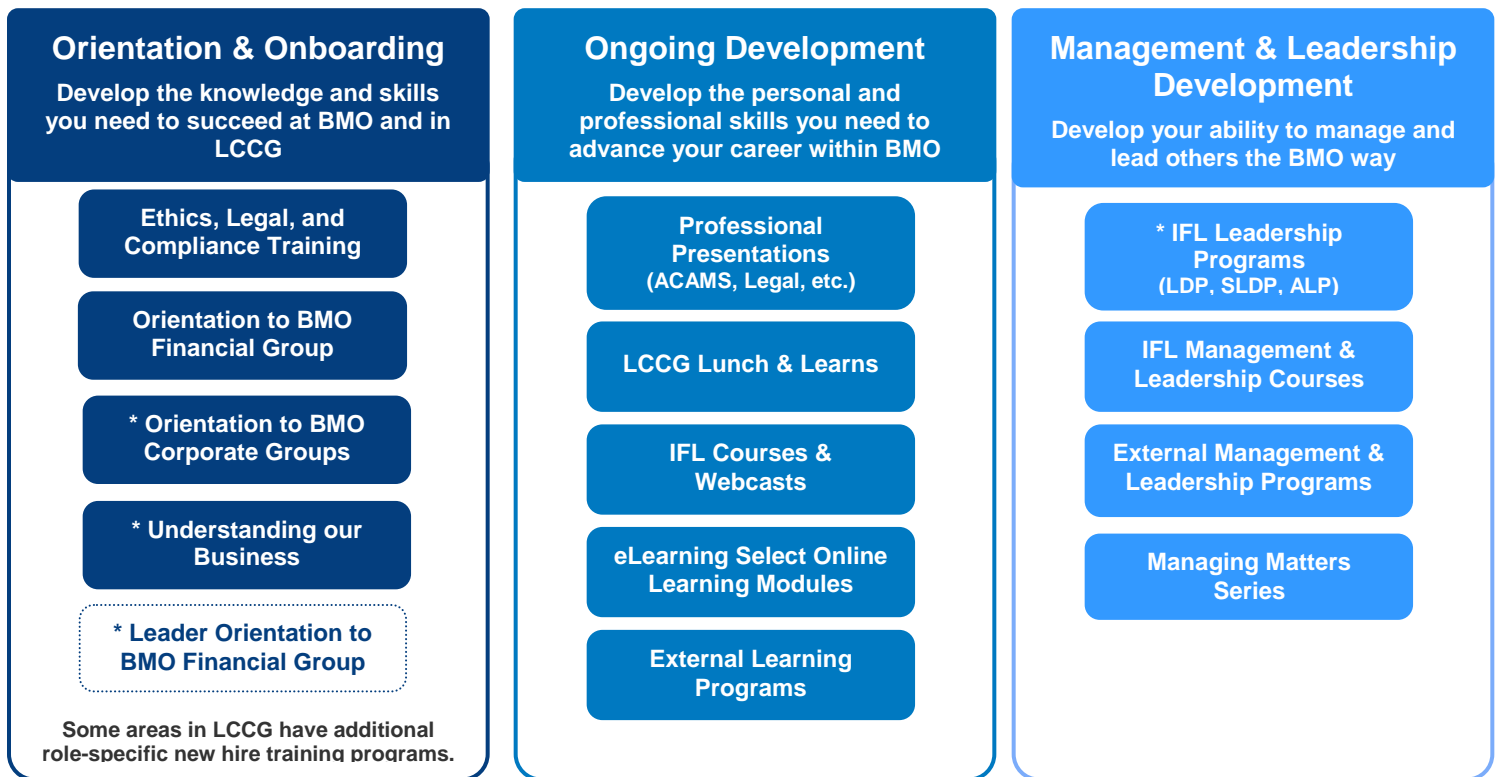
LCCG Learning Framework

LCCG believes that ongoing development is crucial to its member’s personal and professional growth. The three key areas of an LCCG employees’ learning journey are orientation and onboarding, ongoing development, and leadership development.

Orientation & Onboarding: When you begin a new role in LCCG, you will participate in the orientation program based on whether you are new to BMO and/or new to Corporate Areas, as well as your grade. You are encouraged to complete applicable courses within the first 12-18 months.

Ongoing Development: LCCG believes that ongoing development is important to help you gain the knowledge and skills you need to advance your career within BMO. You are encouraged to complete these courses in the second and third years with LCCG.

Management & Leadership Development: BMO’s leadership courses and leadership curriculum focus on helping leaders develop the nine Leadership Capabilities that uniquely define what matters most in being a successful leader at BMO.



* Denotes centrally funded and centrally managed courses.

Recommended IFL Courses & Programs

These courses will be offered on an as-needed basis.

Communication & Interpersonal Skills

- Insights Personal Effectiveness
- Insights Assertive Communications

Management & Leadership

- Performance Planning & Assessment Essentials
- Diversity Essentials
- Employee Relations Essentials
- Interviewing Essentials
- Fundamentals of Change Leadership
- Performance Coaching & Feedback
- Leadership Development Program (LDP)
- Senior Leadership Development Program (SLDP)
- Advanced Leadership Program (ALP)

Presentation Skills

- Presenting to Inspire Action
- Delivering Compelling Presentations
- Facilitating Meetings with Ease

Writing Skills

- Writing for Clarity (online course)
- Effective Writing Workshop
- Plain Language Workshop

Other Business Skills

- Fundamentals of Successful Consulting
- Risk Management for Senior Leaders
- Fundamentals of Negotiation
- Intro to Project Management

SUGGESTED READING

From Law School to Law Practice, the New Associates Guide, Suzanne O'Neill, Catherine Gerhauser Sparkman

Published by ALI-ABA, this handbook provides an accurate picture of what clients and more experienced attorneys will expect from a new associate in a law firm or corporate legal department. Designed to reduce the culture shock that often occurs during the adjustment from student life to law practice, this book offers tips and suggestions on how to go about relating to clients, managing assignments, communicating with supervisors, learning about and adapting to life as a practicing attorney.

Lawyers Professional Development, 2nd Ed.: The Legal Employer's Comprehensive Guide, Ida Abbott

A complete reference for those who are starting, expanding, revising, or restructuring professional development activities. Included are topics such as competency models, technology-based training, and client-law firm collaboration in professional development.

The Art and Science of Strategic Talent Management in Law Firms, written by a long list of PD professionals in law firms.

A guide to produce well-trained and qualified attorneys that consistently deliver on the firm's ever-changing business performance goals. It helps connect the dots between the pipelines of client work and ready talent for law firms of all sizes.

The Lawyer's Guide to Mentoring, Ida Abbott

Directed to every lawyer interested in being a mentor or having a mentor – and to every law office wishing to make mentoring available in the workplace. It unlocks the secrets to finding multiple mentoring relationships that support professional development and success at all stages of a career.

Maximizing Law Firm Profitability: Hiring, Training and Developing Productive Lawyers, Susan Manch and Marcia Pennington Shannon

The 23 chapters of this comprehensive desk reference address every aspect of developing a firm's lawyers, covering topics including: development of lawyer training programs and training curricula; effective recruitment techniques; teaching lawyers how to manage practice groups; developing an effective performance evaluation system; peer and upward reviews; supporting diversity; retaining top-notch lawyers; and addressing the human factors in a law firm merger.

Onboarding Checklist for New Lawyers

Professional Development and Talent Management/Human Resources

- Firm governance and structure
- Risk management – confidentiality, insider trading, conflicts, errors and omissions, and harassment
- Review other firm policies-diversity, social media, etc.
- Payroll and benefits
- Administrative support – assistants, mailroom, library, etc.
- Attendance at internal CPD, conferences and webcasts
- Performance review process and Professional Development plans
- Mentoring

Technology and Library services

- training on software, phones and copiers and other firm technology
- legal research software licenses and policies

Accounting

- Docketing system
- Billings and collections policies - targets, etc.
- Accounting procedures
- Policies for memberships to law society
- Business of Law – docketing, accounts receivable, WIP, fees and disbursements
- Partnership admission

Marketing

- review firm website and develop bio for website and photo
- client entertainment guidelines
- populating firm's contact management system
- support for RFPs

Bibliography for New Lawyers

1. The Lawyer's Guide to Mentoring (*Ida O. Abbott*)
2. The Curmudgeon's Guide to Practicing Law (*Mark Herrmann*)
3. The Trusted Advisor (*David H. Maister, Charles H. Green & Robert M. Galford*)
4. Welcome to Reality – A New Lawyer's Guide to Success (*Paul McLaughlin*)
5. From Law School to Law Practice – The New Associates Guide, 2nd Edition (*Suzanne B. O'Neill and Catherine Gerhauser Sparkman*)
6. Making Partner – A Guide for Law Firm Associates, 2nd Edition (*John R. Sapp*)
7. The Lawyer as Supervisor, Manager & Motivator (*Mary B. Sheffer & Sophie M. Sparrow*)
8. The Busy Lawyer's Guide to Success – Essential Tips to Power Your Practice (*Reid F. Trautz & Dan Pinnington*)
9. Why Lawyers Should Eat Bananas (*Simon Tupman*)
10. What Law School Doesn't Teach You ... But You Really Need to Know (*Kimm Alayne Walton, J.D.*)
11. Supervisory and Leadership Skills in the Modern Law Practice – Creating a Learning Organization (*Paul J. Zwier*)
12. Starting Work for Interns, New Hires and Summer Associates (*Mary Crane*)

Business Development Books for Lawyers

1. Bringin' In The Rain – A Women Lawyer's Guide to Business Development (*Sara Holtz*)
2. 100+ pointers for business development (*Sharon Meit Abrahams & Jill Eckert McCall*)
3. Aligning the Stars: How to Succeed When Professionals Drive Results (*Jay William Lorsch & Thomas J. Tierney*)
4. Business Development Strategies for Partners and Fee Earners (*Stephanie Dale*)
5. Clients for Life: Evolving from an Expert-for-Hire to an Extraordinary Adviser (*Jagdish N. Sheth & Andrew Sobel*)

6. Creating Rainmakers: The Manager's Guide to Training Professionals to Attract New Clients (*Ford Harding*)
7. The End of Competitive Advantage: How to Keep Your Strategy Moving as Fast as Your Business (*Rita Gunther McGrath*)
8. Growth is Dead: Now What?: Law firms on the brink (*Bruce Mac Ewen & Peter J. Kalis*)
9. The Integration Imperative: Erasing Marketing and Business Development Silos – One and for All – In Professional Service Firms (*Suzanne C. Lowe*)
10. A Lawyer's Guide to Networking (*Susan R. Sneider*)
11. The Lawyer's Guide to Increasing Revenue (*Arthur G. Greene*)
12. Pitching to Win (*Claire Adshead-Grant*)
13. Positioning: The Battle for Your Mind (*Al Ries & Jack Trout*)
14. The Professional Services Firm Bible (*John Baschab & Jon Piot*)
13. Professional Services Marketing: How the Best Firms Build Premier Brands, Thriving Lead Generation Engines, and Cultures of Business Development Success (*Mike Schultz, John E. Doerr, and Lee Frederiksen*)
14. A Professional's Guide to Business Development: How to win business in the professional services (*Stephen Newton*)
15. Raindance: The Business Development Guidebook for Lawyers (*Gary Mitchell*)
16. Rainmaking Made Simple: What Every Professional Must Know (*Mark M. Maraia*)
17. Reinventing Professional Services: Building Your Business in the Digital Marketplace (*Ari Kaplan*)
18. Secrets of Masters: The Business Development Guide for Lawyers (*David H. Freeman*)
19. Tomorrow's Lawyers: An Introduction to Your Future (*Richard Susskind*)
20. Winning the Professional Services Sale: Unconventional Strategies to Reach More Clients, Land Profitable Work, and Maintain Your Sanity (*Michael W. McLaughlin*)
21. Women Rainmakers' 101 + Best Marketing Tips (*Theda C. Snyder*)