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Career Advancement into Partnership

Associate Guide

November 2015

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Executive Summary

Who is this guide for?

This guide is for women associates who want to be a partner. While men associates may find the information valuable, it was written particularly as a useful resource for senior women associates looking forward and planning for their future careers. A guide for law firms is available online: http://www.lsuc.on.ca/uploadedFiles/Equity_and_Diversity/Justicia/Law_firm_guide_2012.pdf.

Challenges

The research shows that women lawyers face three main challenges: gender bias, lack of role models and champions, and exclusion from informal male networks.

Preliminary steps – know your firm

The first step to charting your road to partnership is to gather as much information as possible about your firm. While firms may appear similar on their surfaces, each firm has its own unique idiosyncrasies and peculiarities. These can include anything from the criteria used to make assessments about potential partners, to features of the partnership policy, written or unwritten, that are unique to the firm and may have an impact on your progress toward partnership.

Personal Audit

You must assess whether you have the drive to succeed in becoming a partner. Carrying out such an assessment, or personal audit, can help you identify areas of needed improvement which may be holding you back from advancing to partnership. The Personal Audit is divided into the following sections: Satisfaction with Work; Work/Life Effectiveness; and Mentors, Sponsors and Champions.

Practice Audit

In order to make smart and strategic decisions as you progress towards partnership, you need to understand your current practice and the type of practice that will help you advance. A practice audit will help you assess the practice you have against the practice you need.

The Practice Audit checklist is divided into the following sections: Hours and Clients; Time and Financial Management of your Practice; Internal Networking; Branding; and Business Development.

Performance Reviews

You should take advantage of performance reviews to identify areas of improvement that will assist your progress to partnership and to understand where you stand with respect to advancement to partnership.

Becoming an active manager of your own career

Being effective at actively managing your career requires understanding and engaging in all the components that are necessary to advance to partnership. It means creating a plan or roadmap to chart a career trajectory, understanding what is required to build a sustainable practice, determining the best ways to build your brand as a future partner and knowing how to develop your practice through business development and networking. A career plan will enable you to take charge of your career, become your own advocate and locate and access scarce personal and firm resources. It will assist you in focusing on achieving your goal of becoming a partner.

Using your mentor or sponsor relationship effectively

Having a mentor to provide advice and coaching and to champion you is very important in your progress to partnership. Your mentor can assist you in understanding the firm and in preparing your personal and practice audits. A mentor can also provide support during and after your performance review. The mentor can talk to you about your career plan and how to develop and manage your client base.

There is a strong and well established link between mentoring relationships and career success. Lawyers consistently identify a strong mentoring relationship as extremely advantageous, if not key, to developing a successful practice and achieving partnership. It is important to understand and educate yourself about the particular mentoring program that your firm offers. In circumstances where there is no official mentoring program at your firm, or where an existing mentoring relationship is not providing all of the anticipated benefits, you should make efforts to identify a suitable lawyer who may be prepared to act as your mentor, either formally or informally.

When thinking about mentors, it is important as well to consider sponsors. While some mentors may also be sponsors, not all sponsors are mentors. While mentors provide support for you, a sponsor becomes your champion and helps you advance.

Introduction

Who is this guide for?

For women associates who want to be partner. While men associates may find the information valuable, it was written particularly as a useful resource for senior women associates looking forward and planning for their future careers. The Law Society's Justicia Project has compiled a series of strategies to assist you in advancing your career towards partnership. We have consulted the literature, drawn upon research, spoken to career coaches in the field of law and used our own experience to craft what we hope will be a useful and practical guide.

Law firms see a business case for retaining and advancing women. They recognize that firms that advance strong women into partnership are capitalizing on a significant intellectual resource and that a more diverse set of partners will provide more creative solutions to problems. Clients are asking for more diverse teams to service their work and are looking to see if their law firms are incorporating programs to focus on the advancement of women.

Even though firms see the business case, there are still many factors that impact on the advancement of women. However, the time is ripe for you to take a mindful and focused approach to the advancement of your career. You are not entirely on your own. We are working with law firm managing partners to identify ways we can collectively support women's careers and create work environments that are hospitable for women at every level.

So you want to be a partner—why?

You are part of the wave of extremely talented women who make up at least 50% of law schools and entry level associate positions. Many of you have graduated near or at the top of your law school class. "Canadian and US statistics indicate a range in the proportion of women partners from fewer than 16% of equity partners to about 20% of partners in large and medium size firms."¹ Law firms are turning more of their attention to this issue and are seeking to improve the retention and advancement of their women lawyers.

So why strive for this goal? Being a partner in a law firm brings many rewards. It means that you possess not only a valuable skill set, but a demonstrated ability to help clients resolve their complex legal issues and the ability to sustain a client base. It will bring personal satisfaction. It will allow you to do more complex work resulting in greater intellectual satisfaction. As an owner of the law firm, you will participate in business decisions that affect your law firm and its direction. You will have opportunities to leave your mark in shaping your firm in a way that will last. You will be a teacher and mentor to others coming up in your firm or in the profession. You will have more control over the direction and focus of your practice. You will have an opportunity to focus more on business development and to enhance your firm's reputation. You will likely receive substantial financial remuneration as well as tax incentives and benefits.

¹ The Law Society of BC, *The Business Case for Retaining and Advancing Women Lawyers in Private Practice* (Vancouver: The Law Society of BC, July, 2009).

I love the diverse nature of my client base and practice, the unpredictability of it all, and the unanticipated challenges that each day brings. I also enjoy working with a group of exceptional professionals (and individuals), who provide an invaluable sounding board and support network. I felt the same both as an associate, and as a partner. The one added advantage of being a partner is having slightly more control over both my own destiny, and the future of the firm.

- Trisha Robertson, Partner, Blakes

This guide in no way suggests that partnership should be your goal. Partnership is only one route toward a successful and rewarding practice, and is not necessarily the right choice for everyone. If you are not sure whether partnership is the right choice for you, ask what it entails at your firm.

Outline of this Guide

This guide will be a helpful tool in achieving your goal of becoming a partner. This guide is divided as follows:

- Challenges
- Preliminary steps – know your firm
- Personal audit
- Practice audit
- Performance reviews
- Becoming an active manager of your career
- Using your mentor or sponsor relationship effectively
- Conclusion

Challenges

Introduction

The complexities of the path to partnership require a multi-faceted, yet holistic approach that addresses every aspect of your career. This includes being cognizant of potential forces that may create challenges to your professional aspirations. While discussing these challenges in detail is beyond the purview of this guide, more information is available on these topics. We have highlighted here three main challenges for women – gender bias, lack of role models and champions and lack of opportunity.

Gender Biases

All individuals, men and women, have and are susceptible to making gender-based assumptions. In part because firms have an over-representation of men lawyers in senior positions who may be affected by these biases, gender-based assumptions or gender biases should always be a relevant consideration for a woman associate. Gender biases may affect the way women are perceived and judged with respect to their leadership qualities and their ability to take on challenging assignments. It should be noted that it is not only men lawyers who hold these biases; women lawyers may also make gender-based assumptions.

*Simply said, awareness begets identification. Only when gender biases are identified can they be readily addressed and prudently overcome.*²

Gender bias may create challenges for women in law firms that may be very difficult to detect and combat. Nonetheless, an appreciation and understanding of gender bias will be helpful as you chart your career path. We hope that this guide will provide some practical strategies for overcoming these challenges. Some well-recognized patterns of gender bias that have been identified in the literature are summarized below.

Prove it Again

Research suggests that men lawyers may get an automatic vote of confidence from their peers, while women lawyers must constantly prove they can lead. Leadership skills are often associated with stereotypically masculine traits and behaviours (e.g. “taking charge” skills such as influencing superiors and problem solving), and as a result, others immediately assume that men lawyers have the potential to lead and/or generate business, while women lawyers must prove their abilities over and over again.³

Experts state that generally women’s mistakes are remembered; men’s are soon forgotten. Women’s successes are chalked up to luck; men’s are attributed to skill. Objective rules are applied rigorously to women, but may be used far more leniently with men. As a result, women may feel they must “try twice as hard to get half as far.” In some cases, that may mean women only get half as far.⁴

Where this unconscious “prove it again” gender bias arises, women in law firms may feel the need to spend additional time and energy proving that they are worthy of partnership or leadership positions. They may ultimately end up working harder than their male counterparts to prove the same level of competence and achieve the same objectives.⁵

Double Bind

Many women lawyers have been confronted with the feeling of being trapped in a double bind, resulting in a nagging sense that they are required to be both supportive and nurturing *and* decisive if they are to be taken seriously as women and as leaders.⁶

The research tells us that gender bias results from an assumption that masculine characteristics (“taking charge”) and feminine characteristics (“taking care”) are mutually exclusive. These perceptions can be particularly challenging in law firms where “taking-charge” skills and other stereotypically masculine behaviours, such as assertiveness and competition, are often seen as prerequisites for partnership or top-level management positions. A woman lawyer who exhibits “taking care” skills may need to overcome

² For more information on gender biases and how they affect women see Joan C. Williams, “Why Women’s Leadership Initiatives Fail,” *Forbes* (16 December 2010) [Women’s Leadership Initiatives]; and Lauren Stiller Rikleen, *Ending the Gauntlet: Removing Barriers to Women’s Success in Law* (New York: Thomson/Legalworks, 2006) at Chapter 12 [*Ending the Gauntlet*].

³ *The Double-Bind Dilemma for Women in Leadership: Damned if You Do, Doomed if You Don’t* (Toronto: Catalyst Canada, 2007) at 6 [Double-Bind Dilemma]. See also *Women’s Initiatives*, *supra* note 7 at 2.

⁴ *Women’s Initiatives*, *supra* note 7 at 16. See also: Business Case for Retaining and Advancing Women in the Workplace *supra* note 2 at page 16.

⁵ Double-Bind Dilemma, *supra* note 9 at 18.

⁶ *Ibid* at 6.

gender assumptions to establish that she also has the “taking charge” skills necessary to move into the partnership. If she does not, she may be perceived as not ready for partnership. Yet a woman lawyer who openly exhibits taking charge traits may be seen as “overly aggressive,” because of unconscious social expectations about women generally. Women lawyers sometimes consequently feel that they are “damned if they do and damned if they don’t.”

In a recent Harvard Business Review article, author Erin Reid notes that women and men tend to cope with competing demands in starkly different ways. While women tend to openly discuss their family responsibilities and seek formal accommodations to meet these commitments, men often found “unobtrusive, under-the-radar” ways to create more flexible and predictable work schedules. As a result, they were able to avoid having their dedication and work ethic questioned and did not suffer any associated marginalization or penalization.⁷

The Maternal Wall

For some senior partners, a young associate’s transition to motherhood can trigger powerful negative assumptions about her competency and commitment to her law firm. Indeed, the research shows that the “maternal wall” is the strongest form of gender bias in the workplace.⁸ This bias can perpetuate and promote a variety of stereotypes:

- A lawyer who becomes a mother may be assumed to be less available to the firm.
- A lawyer who avails herself of the firm’s flexible work arrangements may be assumed to be less dedicated to the firm, or to her own advancement.
- A lawyer who becomes a mother may be excluded by others from certain high-profile work (i.e. trials, corporate transactions), often in a well-meaning attempt to assist her by reducing travel or workloads, but typically without clarifying what the young lawyer actually wants or needs, and thereby blocking her from work she may have chosen to do.
- A mother who takes a parental leave from her firm may be seen to be taking a “paid vacation.”

Studies generally show that mothers are less likely to be promoted, and are held to higher performance and punctuality standards than women with identical qualifications who have no children.⁹

Lack of Role Models and Champions

Since there are fewer women at the partnership level than there are men, one of the biggest challenges for women working their way up is the lack of role models who look like them or who understand what they are experiencing or who can provide the necessary guidance on building their careers.¹⁰ By aspiring to become a partner, you are serving as a role model for junior women associates at your firm. Also, it is important to remember that many men partners are eager to see women associates advance into partnership.

⁷ Reid, E. (2015, April 28). Why Some Men Pretend to Work 80-Hour Weeks. Harvard Business Review. Retrieved from <https://hbr.org/2015/04/why-some-men-pretend-to-work-80-hour-weeks>.

⁸ See Gender Bias Learning Project, UC Hasting College of the Law online: http://www.genderbiasbingo.com/stereotype_maternalwall.html.

⁹ Women’s Initiatives, *supra* note 7 at 2.

¹⁰ *Ending the Gauntlet*, *supra* note 2, at Chapter 12.

Women need to learn marketing and networking skills early in their careers. Typically these skills are learned from more senior lawyers many of whom because of their gender tend to market and network with a classically masculine model. For them, mentoring less experienced men may come easily. They may not be as comfortable being role models and champions who actively support and take an interest in the broader professional and career development of less experienced women associates. As a result, women associates may not learn at all or as well to navigate the business world or understand law firm politics.

Lack of Opportunities

In a law firm where success is dependent on the ability to inherit and generate both work and clients and on building relationships inside and outside the firm, women associates may find that they face some challenges not shared by their men colleagues. Women lawyers often bump up against the invisible wall between women and men lawyers within a law firm. In the early years of practice, men associates may have more opportunities for informal contact with senior male partners and clients at social events. The predominance of male partners who control the majority of clients/flow of work, shapes the ability of other lawyers, in particular women, to have meaningful assignments, to participate in client development and to create networks. The lack of exposure to clients, lawyer credit manipulation and lack of succession planning combine to make women lawyers “perpetual juniors” with a handicap to advancement within a firm.¹¹ Nevertheless, you have the power to create your own opportunities by establishing and nurturing your own relationships and networks. Again, we hope this guide will offer some practical advice on how to do this.

Preliminary steps – know your firm

Introduction

The first step to charting your road to partnership is to gather as much information as possible about your firm. The importance of gathering information on how to succeed and advance cannot be overstated. While firms may appear similar on their surfaces, each firm has its own unique idiosyncrasies and peculiarities. These can include anything from the criteria used to make assessments about potential partners, to features of the partnership policy that are unique to the firm and may have an impact on your progress toward partnership. Some of these practices or rules are written and transparent; others are unwritten. In some instances, these rules are disseminated to associates, but in other cases, they are learned through experience or through a mentor or more senior colleague. Try to identify both formal and informal sources of information. You will need trustworthy allies, preferably at varying levels, who can keep you plugged in on firm strategy, initiatives and goals before they become formalized and as well give you insights on how you are perceived to be doing in your advancement towards partnership. It is pivotal to amass as much information about the prerequisites to partnership in your firm as possible in order to assist you in developing a comprehensive strategy to achieve your goals to become a partner.

¹¹ *Ending the Gauntlet, ibid.* at Chapters 3 and 5.

Do You Know Your Firm’s Written—and Unwritten—Partnership Criteria?

“Intense commitment and the delivery of exceptional work, — in short, technical performance — have become so routine that they no longer guarantee success.”¹²

You may think that if you develop your skills and reach your billable hours targets, the path to partnership is straight and clear. Many associates have learned this is not true. In reality, you will need to focus on other factors as well. Remember, ultimately partnership admission is a business decision and is focused on a candidate’s profile in the firm and the marketplace and the extent to which the candidate has established and built internal and external relationships and a sustainable practice.

The following checklist will be helpful to you as you gather relevant information about your firm.

Checklist for Partnership Admission Policy and Practices

- Identify and obtain copies of relevant policies (such as partnership admission policies) that outline criteria and process; billable hours targets policies and business origination credit policies.
- Identify unwritten policies and understand the core culture of your firm — talk to your mentors, pay attention to what behaviors receive praise, and seek guidance from someone who has recently been admitted to the partnership.
- Evaluate the criteria for partnership against your own skills and abilities. Understand what each criterion means within your firm and how “success” is measured. Most firms consider some or all of the following as relevant criteria:
 - a sustainable practice;
 - financial management skills;
 - commitment and dedication;
 - client management;
 - profile in the marketplace (via speaking, writing and committee work);
 - business development;
 - responsibility for or carriage of matters or clients;
 - non-billable activities;
 - leadership and delegation;
 - volunteer activities;
 - strong analytical skills, judgment and ethics; and
 - legal expertise.
- There may be a weighting of the criteria for admission to partnership. Gather as much information as possible about the weighting of criteria so that you understand the expectations of the firm. Identify characteristics of successful associates/partners practices that you can emulate. Be aware of the demographics of your practice group and whether there is space for you in the partnership.
- Be aware of the needs of the firm’s clients and how your expertise can contribute.

¹² Jennifer Overhaus, *Juggling the Big 3 for Lawyers* (London: ProvechZiel, 2009) at 6 [Juggling].

- If relevant, determine how maternity and parental leaves and flexible work arrangements may impact on your advancement toward partnership. The firm may have a strong commitment to work/life balance, but taking a maternity or parental leave may still impact your path to partnership. This is largely due to the fact that lawyers on extended leaves, men or women, are not actively developing their skills as lawyers, or their client contacts, and as a result may require a longer period of time to gain the appropriate competencies to be considered for partnership.
- Understand whether your firm has income partners and/or part-time partners and how those options are relevant to your progress. Identify the critical differences between equity, income and part-time partners in order to make informed choices about your options in your progress to partnership.
- Identify what kind of non-billable work is most valued in your firm.
- Understand the business development expectations for partnership candidates (e.g., When are you expected to begin bringing in some business and how much business are you expected to bring in? Does maintaining important existing client relationships count? If so, how?)
- Understand how performance evaluations are taken into account in the partnership admission process.
- Identify coaching, training and mentoring opportunities offered by the firm and the role that these may have on your progress to partnership.

The following two sections focus on how to conduct a Personal Audit and a Practice Audit. We recommend completion of both these audits as they are relevant to understanding your development toward partnership and will assist you in developing a career plan.

Personal Audit

What is a Personal Audit?

Do I have passion for what I am doing? Do I want to continue to do this work as a partner? How can I ensure that my personal goals can coexist with my career goals? Do I need to work on acquiring the skills to be a partner at my firm?

It is important to be introspective. If you really want to be a partner, determine how your personal and professional goals can coexist. Moreover, you should personally assess your strengths and weaknesses. Carrying out such an assessment, or personal audit, can help you identify areas to focus on as you advance to partner.

There are challenges that come with being a lawyer and a parent. Both men and women struggle with trying to manage a successful career and ‘be there’ for their children. I believe there has already been a significant shift in mentality in this regard and we are likely to see the results impact the workplace over the next decade. Ultimately work-life balance must be defined flexibly – and that is okay. Find what you love to do and do it. The rewards are immense. But there will always be sacrifices, and things will always be

crazy. At the end of the day, if you enjoy what you do, you simply become an excellent multitasker. And you will find that you love all of it.

-Trisha Robertson, Partner, Blakes

The Personal Audit is divided into the following sections:

- Satisfaction with Work
- Work/Life Effectiveness
- Mentors, Sponsors and Champions

Checklist for Personal Audit

Satisfaction with Work

When tracking your personal development towards partnership, you may wish to consider the following:

- Are you enjoying your practice area?
- Do you enjoy working with clients, taking responsibility for their legal problems and providing top-notch service to them?
- Do you enjoy business development and the process of finding new clients and generating new work?
- Do you like the firm where you are practising and the people you are practising with?
- What are your strengths? For example:
 - I am a strong team player.
 - I am ambitious.
 - I can build rapport with clients.
 - I am effective at providing client services.
 - I can lead a project.
 - I am a good team player.
 - I am detail oriented.
 - I like to market myself.
 - I am a good communicator.
 - I am a good writer.
 - I have strong time management skills.
 - I can multitask and work well under pressure.
 - I have a good sense of humour.
 - I work well to deadlines.
 - I am good at networking.
 - I am good at nurturing relationships.
 - I am good at problem-solving.

In addition to reviewing your own Personal Audit, you may wish to have an objective person (such as your mentor or practice group leader) review it as well to ensure that it also reflects how others perceive you.

If you rate yourself poorly on a number of these qualities, you may not be on track to meet the partnership criteria, written or unwritten, set out by your firm. What can you do? We have set out a number of suggestions to help you in the following pages.

Do not be discouraged if your personal audit shows some areas where your personal goals and career goals don't quite fit. This is normal. Only if there is a major disconnect between your personal goals and your existing career path is it time to redirect your career path. If that is the case, consider exploring internal ways to seek out a better fit or consider moving to a firm that will be a better fit.

Work/Life Effectiveness

- What are the billable and non-billable hour expectations of an associate and a partner in your firm?
- Are you able to meet these billable and non-billable hours expectations?
- If you find the hours challenging because of family obligations, do you have:
 - sufficient child care?
 - resources to assist in emergency situations, such as emergency child care?
 - resources to deal with contingencies, such as parents or children who are ill?
 - resources to assist you in household management and childcare tasks?
- If applicable to you, does your partner, spouse or significant other support your goal of being a partner?

*To become a partner I had, and used, the entire village and even the neighbouring village!
At critical times, my spouse stepped back to let me step forward, and that made all the difference.*

- Rita Andreone, Q.C., Partner, Lawson Lundell

If you are unable to meet the firm's hours expectations at this time because of family responsibilities, be proactive, take charge of your career path and consider asking for an alternate path to partnership. This could include a flexible work arrangement or an extended track to partnership. Don't wait to see what the firm does when your hours are low. Demonstrating a "take charge" attitude toward your own career path may be one way to show the firm you have what it takes to manage a practice and make it as a partner.

At the same time, appreciate the immense flexibility that technology provides. The ability to work remotely allows you to be fully responsive and still spend time with your kids and interact with your family in a meaningful way.

Technology has had a huge impact on the practice of law. It is certainly a double edged sword, but for me, I find that the benefits far outweigh increased client demands and expectations regarding availability and turn-around time. As a partner, I spend far less time drafting or turning documents. Most of my billable time is spent considering issues regarding transactions, discussing the same with clients, and overseeing the work done by associates. These are all things that (for the most part) do not require that I be tied to a desk. With today's technology, I have more freedom to enjoy time with my family while still feeling connected to my clients and being responsive to their needs. It may mean that you are reviewing documents on your iPhone while watching swimming lessons, or talking your client off a ledge while you watch your kids build sandcastles on the beach, but the point is you are there, with them, and when the crisis is over, you sit back down and dig a moat.

- Trisha Robertson, Partner, Blakes

Mentors, Sponsors and Champions (Also see Section "Using Your Mentor or Sponsor Relationship Effectively")

- Are you satisfied with your "mentorship" relationships at the firm? Have you tried to seek out a mentor in a powerful position who will champion you?
- If you do not have an internal mentor or if that mentoring relationship is not successful, have you sought a mentor in the broader legal community through an external program?
- Do you have key work providers with whom you have a good relationship and who are providing you with appropriate work opportunities? Do you understand the work allocation process at your firm? Do you have a strategy to obtain the work opportunities that will assist in your advancement? If not, have you considered seeking assistance with this from your practice group leader or mentor?

Practice Audit

What is a Practice Audit?

In order to make smart and strategic decisions as you progress towards partnership, you need to understand your current practice and the type of practice that will help you advance. A practice audit will help you assess the practice you have against the practice you need.

This checklist is divided into the following sections:

- Hours and Clients
- Time and Financial Management of your Practice
- Internal Networking
- Branding
- Business Development

Checklist for Practice Audit

Hours and Clients

Annually, review your practice over the last year as follows:

- How many hours have you billed?
- How do your hours relate to firm billable hour targets?
- Which clients have you worked for and how many hours for each?
- Are your clients on the firm's list of major clients? If not, will this be a problem?
- Is your practice appropriately diversified or specialized for your year of call and in light of your overall career plan and future goals?
- How many hours of work do you get from more senior partners at the firm? Are they significant partners?
- How many hours do you generate yourself?
- How many files are you the billing lawyer on?
- How many hours of work did you delegate to more junior lawyers?
- How many significant matters were you the lead on?
- Are you the relationship lawyer for any clients? Have you attracted new matters or new clients yourself?
- Are you a member of any significant client teams?
- Are you a leader of any significant client teams?
- Are there matters that were generated as a direct result of your efforts with an existing client or clients that you brought to the firm? If so, how many hours did these matters account for?
- If you are moving towards specialization, will this specialization be sustainable and feasible as a partner? Will you be able to generate enough business in that area to keep yourself and others busy over the long-term?

Time and Financial Management of your Practice

- Do you capture your hours on a daily or weekly basis?
- If applicable, do you submit your hours on a timely basis?
- Do you bill promptly for files on which you are the billing lawyer?
- How much of your time was written off in the last year?
- How much of your time was premium billed? How long are your receivables outstanding?

If you don't know, how can you find out?

If you are struggling with time management, are you being efficient with the way you spend your time at work? If not, have you explored ways to increase your productivity? Have you asked for coaching in this area or arranged it on your own at your own expense?

As well, if applicable, have you discussed with your spouse, partner or significant other how you might more equitably share household and childcare responsibilities? Have you explored hiring resources that may help you at home?

Internal Networking

- List senior, influential work providers who have referred you work this past year.
- List how you have marketed yourself internally during the past year.
- List your sponsor or sponsors at the firm who can be an advocate for you and help you build your profile internally. If you do not have a sponsor, identify someone who you will ask to fulfil this role.
- List the role you play on any key firm committees.

Branding

List how you have increased your external reputation and profile in the past year by:

- writing and/or speaking on your areas of expertise;
- sitting on any corporate or not-for-profit boards;
- participating in any industry groups related to your practice; and
- participating in volunteer or social activities related to your practice or to potential client contacts.

Business Development

- Did you make a business development plan? Did you follow it?
- What are the expectations at your firm for associates and partners regarding business development? List the business development activities with clients that you carried out in the past year and rate their results, if any.
- List the external networking activities you engaged in over the past year with potential clients or contacts. Which were the most effective?
- List internal and external resources you have used to help you develop business.
- If your firm has business development resources that are specific to women, list those you have utilized.
- If your firm does not have business development resources that are specific to women, list any you initiated.
- Have you asked for coaching in the area of business development or have you arranged it on your own at your own expense?

Performance Reviews

Introduction

You should take advantage of performance reviews to identify areas of improvement that will assist your progress to partnership and to understand where you stand with respect to advancement to partnership.

What is a Performance Review?

A performance review in a law firm is a method by which the performance and career development of an associate is evaluated. Performance reviews can be written or verbal. Ideally, following an oral review, you should receive a written summary of the review as well as have a follow up discussion with a mentor

or person with whom you work. A performance review is a part of guiding and managing career development.

Generally, the aims of a performance review are to:

- provide feedback on performance (both positive and constructive);
- identify development needs;
- form a basis for decisions such as advancement, salary increases and performance bonuses;
- facilitate communication between the associate and firm management;
- assess career development/progress within the firm; and
- develop a plan or strategy as to how to progress towards your goals.

Thinking about performance reviews causes most associates some degree of anxiety. Apart from the fact that receiving constructive feedback is daunting to almost everyone, many associates do not know what to expect from their performance review because they have not received ongoing feedback on their work throughout the year. This may occur because supervising lawyers have failed to give it or because the associate has not asked for it at the conclusion of projects.

If you find yourself in this position—do not despair. There are steps you can take to become a more active participant in your performance review or to seek out a review if your firm does not schedule them.

How to Benefit from Performance Reviews

Performance reviews are an opportunity to have a two-way, thoughtful discussion about your development and progress towards partnership. Approach the feedback with an open mind and try to be as objective as possible. A good performance review will indicate areas in which you excel as well as those that need improvement. Do not underestimate the importance of seeking regular feedback from those you work with. A formal performance review usually comes only once a year but you can seek informal feedback after every assignment. The information you receive in this fashion will be current and timely and will allow you to make changes as you go and will avoid surprises at your formal review.

Remember that the way you respond to a performance review can influence how you are viewed. The following are some tips to maximize the benefits of performance reviews:

Get into the right mindset. Treat the review as an opportunity to learn. Your performance review is an opportunity to ensure that you fully understand your firm's view of your development and your development objectives.

Prepare. Regard a forthcoming review as an opportunity to step back and think about how you are developing as a lawyer. Ask yourself the following questions: Are you still enjoying your work? If not, why not? What work would you like more/less of? Are there partners you would like to work with? What accomplishments are you most proud of? Do you need any training? What work do you need to assist you in advancing into the partnership? If you enter your review meeting with an idea of what is going well and some suggestions for improvements, you and your firm will benefit. Also think about non-billable opportunities. Are there business development projects that you would like to pursue, committees you would like to join or continuing professional development (CPD) events or conferences you would like to attend? The review is an opportunity to raise all these issues with your reviewer.

If provided, read your review summary carefully. If you are given a written summary of your review, read it carefully after your review to ensure that all points (both positive and negative) have been included in the written summary. Ask for corrections if needed.

Focus on the big picture. Ask “What is the main message I should take from this review?” Ask questions about your progress toward partnership. Ask about your strengths as well as areas for development. During your review, try to establish specific short- and long-term goals to assist you in progressing to partnership. Also establish a plan for monitoring these so that you have a better opportunity for achieving them over the next review period.

Remember that everyone can improve. Try to accept constructive feedback that is offered. Being defensive may be judged poorly. Remember that you see things from a totally different point of view. If you are honest with yourself about the feedback, you may even accept that it is justified. Instead of demonstrating upset or anger, which is a natural human reaction, say that you will think about what has been said. We all make mistakes; the trick is to learn from them, and not make them again. If you really believe the feedback is unfair, do raise it, in a balanced fashion after you have had some time to reflect.

Ask for help. If there are areas where additional training or mentoring would assist you.

Make sure you understand, from your review, exactly where you stand with respect to partnership and what the firm can do to help you perform better, or more efficiently, or with greater consistency. You should both be working towards agreed, achievable goals that lead to partnership. If you are not satisfied that these things have been achieved, you should request a further discussion.

Specific Questions to Ask in a Performance Review

The following are examples of questions that you may wish to ask during your review:

- Am I on partnership track?
- How am I doing in relation to the firm’s partnership criteria? Which areas are viewed as my strengths? Which areas do I need to further develop?
- If the decision on partnership admission was being made today, would I make it? What criteria would I be perceived as missing?
- Am I making the progress toward partnership that is expected at this stage of my career and that is required?
- What are the one or two most important things I need to do to improve my chances of becoming a partner?
- Are there resources the firm would make available to assist me in meeting my goals that you as the reviewer would recommend?
- Who gave the feedback about me for this review? If partners with whom you did a great deal of work did not provide feedback for your review, you may wish to follow up with them.

What do you do if Your Firm Does Not Hold Formal Performance Reviews?

Performance reviews provide an opportunity for feedback that is integral to helping you develop as a lawyer and progress towards partnership. If your firm does not conduct formal reviews, take the initiative and ask the lawyers with whom you work for feedback on a regular basis. You could also ask to meet with a partner or mentor to discuss your progress. You do not need to call it a performance review. At the end of such a meeting you should try to summarize in writing what you were told so that you can keep a record of your informal review. You might then wish to sit down with your managing partner or practice group leader to review what you have been told so that you can ensure that it lines up with how the rest of the firm sees you.

Negative Performance Reviews

What can you do in the case of a negative assessment or performance review? It can and has happened to even the most hard-working and diligent lawyer. You need to calibrate what the overall “message” of the review is (purely developmental or “negative”). Criticism and critiques can be hard for anyone to take, especially in your job where you are constantly striving to do your best. Remember the following:

- If you are faced with criticism, do not be afraid to ask for examples and clarification if you are unclear on the critique or what the problem is. It is important to always remain calm and not become argumentative in this situation. If you feel the observations being shared are incorrect, use specific examples to state otherwise.
- Look at the review as a way to learn what specific aspects of development you have to work on to get to partnership. Assume there will be some negatives, but take this as constructive criticism that will help you take the next step in the job and reach your future goals. In most cases, your firm is only trying to help you achieve those goals and help you improve on the areas where you are weak.
- Ask for the input of the feedback provider and get advice on how to resolve any negatives discussed in your review. It might be beneficial to have a follow-up discussion after an agreed upon period to check in on the progress you are making.
- Clarify the message regarding partnership. If you have received a negative review, make sure you understand how this impacts on your progress to partnership. If there are things to work on, clarify how long the firm expects this to take and what help they will give you. If you are being advised that a form of income partnership is what is likely ahead for you, probe to find out what it would take to change this view of the firm so that you may still strive for equity partnership.

Women's Perspective: What are the Challenges and Opportunities in Performance Reviews?

Research has suggested that because of unconscious gender biases, women may need to work harder than men to demonstrate their skills and competencies and to ensure their potential is recognized.¹³ Here are some strategies to help you use the performance review process as an opportunity to do this:

- Ask those with whom you have worked to provide feedback not only on your level of performance but also on your ability and readiness to assume more responsibility and to move onto more complex tasks.
- Ask explicitly about the firm's partnership criteria and how your current skills and achievements measure up against the criteria. Use the performance review meeting as an opportunity to explore these issues in depth (see section entitled "Specific Questions to Ask in a Performance Review").
- Ask explicitly about the criteria where you still need to develop and discuss specific strategies for developing and improving with your mentor. You may wish to brainstorm as well with your practice group leader and other successful partners in your firm to further refine your development strategies.
- If you believe that you have been judged as lacking in certain stereotypical male attributes of leadership such as assertiveness, aggressiveness, being action-oriented, results focused and a good problem solver, speak to your mentors and others about how to clarify and demonstrate that you have indeed exhibited these qualities in your work to date and ask for their advice as to other things you could do to develop or further demonstrate these types of leadership qualities.
- If you perceive that men associates are being offered greater opportunities to advance more quickly than their women colleagues, speak to your mentor or supervising lawyer about whether there are reasons related to your performance that are preventing you from getting such opportunities. If not, look for "stretch" opportunities throughout the next year to increase your skills and experience. Do not hesitate to ask for such opportunities directly. Track your requests if you are not successful and raise the issue at your next review.
- Create a written Career Plan, whether or not your firm has a formal process for this, based on your performance review meeting and any follow up meetings you've had with your mentor, practice group leader and other partners. The Career Plan should reflect the skills and competencies you've attained based on your performance review, as well as your specific plans to develop or demonstrate the criteria that are currently viewed as missing. (For help on developing such a plan, see the next section of this Guide "Becoming an Active Manager of your Career.")

¹³ A study by Monica Biernat, M.J. Tocci and Joan C. Williams analyzes performance evaluations of male and female junior attorneys in a Wall Street law firm. The study found that the narrative comments in performance evaluations either favoured the women being rated, or treated them no less favourably than men. However, in the numerical ratings that mattered for promotions, men did better. See *The Language of Performance Evaluations: Gender-Based Shifts in Content and Consistency of Judgment*, Social Psychological and Personality Science, published online on July 18, 2011 at <http://spp.sagepub.com/content/early/2011/07/15/1948550611415693.full.pdf+html>.

Conclusion

Once you have identified the culture, rules and policies and expectations of the firm, conducted your personal and practice audits, and received a few performance reviews, you are ready to start planning how you will effectively manage your practice to get to the partnership level. The next section will assist you in planning your progress.

Becoming an active manager of your career

Introduction

Now that we have discussed various building blocks to help you understand the path to partnership and where your personal goals and practice profile fit, now is the time to put these elements together in a plan that will help you move forward.

This section of the guide discusses the following:

- The Need for a Career Plan
- Using your Personal and Practice Audits
- Developing and Setting Goals
- Building a Sustainable Practice
- Delegation
- Understanding the Importance of Clients
- Building your Client Base
- Building your Brand
- Selling your Services
- Checklist for Building a Career Plan

The Need for a Career Plan

Being effective at actively managing your career requires understanding and engaging in all the components that are necessary to advance to partnership. It means creating a plan or roadmap to chart a career trajectory, understanding what is required to build a sustainable practice, determining the best ways to build your brand as a future partner and knowing how to develop your practice through business development and networking. In short, being effective at actively managing your career requires a proactive and multi-faceted approach.

In the busy practice of law, it is very difficult to find the time to develop a career plan and even more difficult to implement the plan. But the rewards are significant. A lawyer without specific and identifiable goals may find that she lacks direction or focus in her practice. But a person who identifies and writes down goals is more likely to achieve them.¹⁴ A career plan will enable you to take charge of your career,

¹⁴ Sharon Meit Abraham, “Personal Strategic Planning: Gaining a Competitive Advantage Edge” (2007) 8 (1) Practice Innovations: Managing in a Changing Legal Environment 6 [Personal Planning].

become your own advocate and locate and access scarce personal and firm resources.¹⁵ It will assist you in focusing on achieving your goal of becoming a partner.

Your efforts to actively manage your career will have the best chance of success if you carry out personal and practice audits, set specific goals for the year, build specific actions into your regular “to do” list, and track your progress throughout the year. All of this should be incorporated in a Career Plan. Developing a Career Plan each year starting at an early stage in your career and consistently working towards your goals will make reaching the milestones necessary for partnership consideration less daunting.

We will be highlighting how to develop a Career Plan below.

Using Your Personal and Practice Audits

Developing a career plan first entails a self-assessment and an inventory of your strengths and weaknesses specifically in the context of the firm’s partnership criteria.¹⁶ As well, it entails making an analysis of your practice so that you can identify what changes if any you need to make in the coming year. You should refer to the personal and practice audits set out in this Guide - they are great tools to complete your career plan.

Be realistic and self-critical in your assessment of your strengths and weaknesses. Don't ignore the partnership criteria that you are missing, thinking that these criteria must not be important if you are currently busy and getting good feedback on your work. Many associates, men and women, find that their supervising lawyers emphasize the positives in their performance, measuring them favourably against the "associate performance yardstick". These well-intentioned supervising lawyers may not have focused on the associate's gaps, as measured against the "partnership admission yardstick", which may be some years away. However, it is important for you to uncover any gaps early so that you can proactively plan to address them effectively.

Developing and Setting Goals

One important component of the career plan is to develop goals.¹⁷ Your primary goal is to progress into partnership. You will also need to set secondary goals to help you achieve your primary goal. Engage in a brainstorming session and identify and write down all potential goals. Employ mentors to help you plan. Get thoughts and advice from others on what you are doing and what works and does not work for them. It is very important that the goals and your career plan be committed to writing.

Next, weigh your goals against your strengths, weaknesses and personal motivation (identified in the personal and practice audits) and the goals of your firm (identified in the firm’s partnership criteria). Goals that are not consistent with personal motivation may not be achievable. A career plan that requires

¹⁵ Marcia Pennington Shannon, “Managing: Helping Employees Create Career Development Plans” *Law Practice* (April 2004) [Managing]; Personal Planning, *ibid*.

¹⁶ Kathleen Bradley Chouai, “Career Planning for Lawyers - Why It Is Important What It Looks Like and Why Law Firms Should Invest In It” (2005) 90 (4) *Women Lawyers Journal* 18 [Career Planning];

¹⁷ Personal Planning, *supra* note 8.

you to engage in activities that are unfamiliar or uncomfortable will not be successful.¹⁸ Moreover, negative perception or performance results may result from goals that are not consistent with firm goals.¹⁹

Goals must be realistic and achievable: Effective goals are SMART: specific, measurable, attainable, realistic, and timely.²⁰

Identify short and long term goals: You may have multiple secondary goals, which should be identified as short term (0-1 years) and long term (2-5 years) and prioritized.²¹ Each goal should be further broken down to shorter time lines such as annual, 90, 60, 30 day or even weekly achievable targets.²²

Each goal should include the statement of the goal, the strategy and timing to achieve the goal and the benefit of achieving the goal.²³

Establish measurable goals: A measurable goal will require monitoring and evaluation of progress in comparison to the career plan. A goal must be sufficiently specific to be measurable. For example, a goal of increasing your billable hours is not specific and impossible to measure. A goal to increase your billable hours by a specific number is measurable. A goal of increasing your industry presence is not specific or measurable. A goal of taking on a specific number of speaking engagements or writing published articles in the particular industry is measurable.

Identify action steps: A strategy to achieving the goal includes developing a course of action and identifying obstacles. Once again, engage in a brainstorming session to identify all possible actions to achieve the goal.²⁴ Action steps should include answering the questions of who, what, where, when, why and how. The actions shall be specific and include targets, milestones and time lines. Specific due dates and milestones will increase the likelihood of achieving the goal.²⁵

Goals evolve and change: Be patient, stay with it, and keep revisiting your plan and what is working and what is not working. Goals will evolve and change as priorities change. Personal circumstances may change, such as health, family or a change in status from associate to partner. Firm priorities may change as practice areas expand or contract. A lawyer with a clear sense of self, strengths, weaknesses, values and interests are more adaptable to these changes.²⁶

¹⁸ Jan Norman, *What No One Ever Tells You About Marketing Your Own Business: Real-Life Marketing Advice from 101 Successful Entrepreneurs* (Warriewood: Dearborn Trade Publishing, 2005).

¹⁹ Talula Cartwright, *Setting Priorities - Personal Values Organizational Results* (Greensboro: Centre for Creative Leadership, 2007) [Setting Priorities].

²⁰ Personal Planning, *supra* note 8.

²¹ Managing, *supra* note 9.

²² Cordell M. Parvin, "How to Prepare a Business Plan That Will Make you More Successful" online: Cordell Parvin <<http://www.cordellparvin.com/index.html>>.

²³ Personal Planning, *supra* note 8.

²⁴ Cordell M. Parvin, "Planning for Success in 2010" online: Cordell Parvin <<http://www.cordellparvin.com/index.html>>.

²⁵ Managing, *supra* note 9.

²⁶ Career Planning, *supra* note 10.

Monitor and measure performance against the goals: Monitoring and measuring your performance against your goals will determine if and why goals are being met. A difference in the stated goals and those achieved through action may signal that your personal commitment and values differ from stated goals and values and necessitate re-evaluating the stated goals and plan of action.²⁷

Building a Sustainable Practice

The sooner an associate realizes it, the better: law is a business. When developing a career plan, focus on building a sustainable practice, which will include not only doing your work but also focusing on the business aspect of developing clients and bringing in work. The business component of a career plan helps to ensure that work will flow, not only now, but years from now. It is that flow of work that places you on the path to partnership.

If you focus only on doing your own billable work and neglect to build your business, you will not achieve your goal of becoming a partner. A practice that focuses on not only doing the work but bringing in more work and delegating some or all of it to others is a sustainable practice. It is important to remember that “doing your work” will include not only billable work but also making a level of contribution to the firm through non-billable work (such as mentoring, student recruitment, client development) that is consistent with the firm’s partnership track expectations.

Delegation and Leadership

As noted above, as a partnership candidate, you must ensure that you are meeting your firm’s billable and non-billable hour targets as well as delegating work to more junior colleagues. If you are not delegating at all or only delegating in a minor way, you will not be establishing a partner level practice. Being a smart, dedicated and hard-working associate who bills 2,000 hours a year can only guarantee personal success as an associate.²⁸

In your Practice Audit, you were asked to track how much work you had delegated to others in the past year. One of your secondary goals in your Career Plan should be to increase the amount of delegation you do over the current year and the next few years. Ensure that you are not holding onto work that is now too junior for you. Look for ways to include a more junior associate in each of your files. Track the kind of work you are delegating and the hours you have given to others. Assume leadership and strategic roles on files and with clients as you progress and don’t get lost in volume, detailed work. Use some of the time you have freed up for yourself to work on business development and developing your reputation as an expert.

I have observed that many women (lawyers and clients alike) assume a perennial 'junior' or 'second in command' role in the belief that it will be less stressful and more flexible than the 'lead' role. What often happens is that all the technical work, many of the toughest decisions and the responsibility for 'making it happen' fall to this role and there is little control over schedule or priorities. Moreover, full access to client relationships, strategic

²⁷ Setting Priorities, *supra* note 13.

²⁸ Susan Smith Blakely, *Best Friends at the Bar: What Women Need to Know about a Career in the Law* (New York: Aspen Publishers, 2009) at 145 [Best Friends].

board connections and high revenue (equity) positions are sacrificed. So, if you are already doing the heavy lifting, why not risk taking the lead role?

- Linda Parsons, Q.C., Executive Coach

Understanding the Importance of Clients

In order to succeed as a partner in a law firm, whether large or small, you must have clients provide you with a constant stream of work. When you first start out as a student or junior associate, your work may consist of helping partners or other lawyers in your firm with their client matters. Your colleagues are your “clients”. However, if over time you are to become a partner, you will need to go beyond the existing pool of client work in your firm, and grow your firm’s business by attracting new client work yourself or by maintaining existing clients.

Opportunity and career advancement are tied to the ‘value’ the lawyer brings to the firm and value to a law firm is all about ‘rainmaking’—developing new clients, driving business within existing clients, and becoming known in the business community.

Building Your Client Base

You need to concentrate on maintaining and expanding your client base. To do this you need to market yourself and your services to clients and prospects. To do this most effectively, you need to figure out who your ideal target market is, build your relationships and network with that market in an effort to expand the pool of clients and potential clients who will be sources of work for you as a partner.

This may be less of an issue today than previously, but take control over your own career advancement and don’t expect to inherit practices or clients in the same way some men might. That way, if you do, its gravy. Some people earn these benefits. Some, not so much. The world has changed and clients are less loyal themselves. It’s very competitive. Be an advocate for yourself and demand to be noticed and taken seriously. The wallflower never gets asked to dance. Sandberg’s advice isn’t new – she just branded it as “leaning in.”

- Rita Andreone, Q.C., ’89, Partner, Lawson Lundell

Here are some steps to consider:

- Develop a contact list of current and potential clients.
- Review and update your contact list on an annual basis.
- Identify the priority contacts that are most likely to be sources of work for you or your firm.
- Build relationships with your current and potential clients. Plan regular relationship-building activities, keeping in mind that simple activities, like sending holiday cards or newsletters, may be feasible for all clients, while more regular, time-intensive activities like lunches and dinners are most useful with your priority contacts. Keep your network vibrant and growing just by

staying in regular touch. Focus on activities that both you and your contacts will enjoy. Invest considerably more time on relationships that are most likely to matter.²⁹

- Expand your network and your contact list with the target audience most likely to buy your services, by participating in industry associations or networking events.
- Consider whether to pitch a client directly.
- Seek to get involved in your firm's responses to Requests for Proposals (RFPs).
- Consider how to differentiate yourself so that clients will select you.
- Look for client opportunities in different situations. Do not ignore the following situations as sources of potential clients—charity volunteerism, not for profit board positions, networking groups, religious organizations, art appreciation groups, book clubs, festival organizations, community groups, and your friends and family.
- Set aside time for business development activities. Plan time daily and weekly to work on business development activities. Successful partners say they devote three to 10 hours a week to business development – whether on lunches, making calls, preparing for presentations or pitches, attending networking events, or a myriad of other activities. Many say they do something every day, even if just to make a call to say “let's plan lunch”. Others choose a particular day each week to spend time on business development activities.
- Don't always ask for work. Ask your clients how you and your firm could be more helpful to them. Providing a seminar to your client's employees at no charge or inviting clients to continuing professional development events at your firm will build loyalty and may result in future work. Giving (for free) ideas, opportunities, connections, products and timely warnings to clients will always build business and loyalty.
- When you do ask for work, don't take a “no” to mean “never” but instead to mean “not now”.
- Plan what you will do and when: Set goals for business development. Set aside time for business development by blocking off time in your calendar. Stand by your commitments.
- Make your business development efforts known.
- Invite others to join you in business development activities when appropriate, showing you are a “team player”, thinking of the firm as a whole.
- List your board activities. Include updates in your annual review.
- Docket your time if your firm tracks non-billable hours.
- Keep a record of your efforts and their successes.
- Track what is working and what is not and adjust your plan accordingly.

²⁹ *Ibid.*

Check out your proposed activities with your Firm

Make sure that your proposed business development activities are in line with firm policies and goals for client activities. Let your managing partner or practice group leader know what you are planning to do and get their approval before you start.

Do not hesitate to use firm resources such as sports tickets or tickets to other cultural events for your own business development activities. Ask for other resources or financial support when needed.

Women's Perspective: What are the Challenges and Opportunities in Building a Client Base?

More clients are men. The majority of purchasers of legal services are men. This can be challenging for women, who may not come to the legal profession with the same “ready-made” networks as some of their male colleagues, and may find it harder to build relationships with the men in their networks. Here are some strategies to consider:

- You have more of a network of potential clients than you think. At the very least, you have law school and university colleagues who are now working in business or other law firms. Make sure to include relationship building with these contacts who are at your level of seniority. While they may not be currently in a position to provide you work, they certainly may become a future resource. As well, you have been exposed every day to clients, parties on the other side, and third parties like accountants and other experts since the day you started practising. Do not dismiss these contacts because you did not play hockey with them in grade school - concentrate on building a relationship with them now and staying in touch.
- Piggy back on the networks of the men in your network to reach out to potential clients. You have lots of men in your network, including mentors, peers and clients. Some of them will be happy to introduce you and help you build your contacts from among their contacts. A referral from an existing contact or client (a “champion”) is a very effective marketing tool. Figure out who these allies are and be proactive about asking them to help you. Be specific about what you need.
- Work hard at finding commonalities and areas of rapport with clients and contacts who are not the same gender or age as you. Everyone has to do this (even men). Learn about their business and read what they read and share insights about challenges your business is facing or that you have heard from other clients. Look for commonalities outside the business context. There are lots of topics like children, parents, hometowns, vacation destinations and news items that lead to conversations that can uncover commonalities. Be interested in your contacts, listen to them and you will discover things in common.
- Do not think that you have to do traditional business development activities such as playing golf or going to hockey games. Many clients, both men and women, enjoy events such as the theatre, concerts, the symphony, films, cooking, the spa, biking, running and other activities which may be more appealing to you and your clients. For women clients, you may want to create special event that appeal to women such as hosting a spa afternoon or a cooking class.
- Design business development activities and events so that there is no confusion as to intent. For example, ‘lunch’ sends a good message if you are in a situation where clarity is required.

Increasing numbers of clients, especially in-house counsel, are women. This is a huge opportunity for women. Tap into networks of women in-house counsel, and women's industry groups. Offer to work with your women clients jointly on women's initiatives. Invite your women clients into the firm to talk about what they are doing for women in their industry.

Relationship Building: Building a client base depends on the ability to build relationships meeting by meeting, case by case and year by year. Women have a demonstrated strength in building and nurturing relationships in their personal lives and can use this strength to their advantage in developing and nourishing client relationships.

Building Your Brand

Introduction

What is a brand? Lawyers with a strong "brand" are most effective in attracting work from clients. Your brand is what you are known for. If you are known for doing excellent legal work, being a consummate team player, and delivering excellent client service, you have covered the basics. However, there are many lawyers in every field and every firm who are known for these qualities. If clients are to choose you from amongst many competitors you need to have a more distinctive brand.

Building a distinctive brand: In order to build a distinctive brand, many lawyers work hard to develop a reputation for special expertise in a range of areas. In other words, you need to declare your major. Clients want experienced lawyers who have logged time in one area of law. Be the go-to associate for partners who are involved in your area of interest.

Questions to ask yourself. As you develop your own plan to build your brand, here are some questions to ask yourself:

- What special knowledge, expertise or skills do I have that I could market on a broader scale to clients? Consider specialized legal knowledge and experience, business and industry expertise, language skills, and other expertise that set you apart from competitors. "Clients like generalists but pay for specialists," so try to have both facets covered in your brand.
- What expertise or skills do I need to further develop to have a stronger brand? These might include substantive knowledge and expertise in a supplementary area that is in high demand by your target client base, or softer skills such as communication or presentation skills that would allow you to convey your expertise with more authority.
- What can I do to enhance my reputation in these areas?
 - *Website:* Make sure your website profile clearly articulates your special expertise and experience.
 - *Writing:* Consider writing a column in your area of expertise in a legal or trade publication; consider starting or contributing to a law related blog; establish newspaper and media contacts and indicate you will make yourself available for background off the record briefings as well as a contact for news; and finally don't ignore social media—use social media to your advantage (Twitter, LinkedIn, Facebook, etc.).

- *Speaking*: Consider where you wish to speak—research what opportunities are available. Speak in front of your colleagues at internal firm seminar as to increase your credibility. Consider professional development conferences and seminars and seek opportunities to speak on a panel. Offer to speak at one of your client’s internal seminars. Get yourself in front of large groups of clients or potential clients by pitching to speak at trade associations, legal seminar providers and other organizations.
- *Join professional groups and trade associations*: Joining organizations in your field of specialization will help you get in front of clients and potential clients as well as demonstrate your expertise.

Establish the Necessary Resources to Ensure Success

Get help if needed. Perhaps you need tips on speaking or presentation skills. You can also attend programs that address these issues. Ask if you need communications, presentations, image consulting (attire, body language, deportment) or an etiquette coach.

Women’s Perspective: What are the Challenges and Opportunities in Building a Brand?

Time. Time is a challenge for all lawyers, especially parents. One challenge frequently identified for women is that they spend more time on child care and household management per week than their men colleagues.³⁰ This translates into having less time to spend on marketing activities. Each family has to make decisions about the best way to share income-earning and child-care responsibilities in their own circumstances. If you want to become a partner, you will obviously have to devote the necessary time and effort to build your brand in order to succeed. Make thoughtful choices with your spouse about how you share family obligations, having regard to the time investment required for you (and your partner, spouse or significant other) to meet your career goals, and become a time management expert so that you can meet the family, client and career expectations you have set for yourself. Explore what resources are available to you to take household management tasks off your plate (e.g., cleaning services). Ensure you have enough resources to assist you. In addition, ask yourself what you are spending your time on at the office. Is it the highest and best use of your time? Could you delegate more effectively?

Credibility and Confidence. Research tells us that most people, men and women, make implicit assumptions that men associates have expertise, credibility and the trust of others. This is a form of gender bias. Women who are faced with these attitudes from others in the firm, need to focus on their own strengths in the areas of networking and relationship building. Women need to be especially attuned to substantive brand-building strategies that emphasize their credentials and lend weight to their expertise, such as speaking engagements and writing for publications. Women may also need to invest time in building their communication styles and presentation skills so as to demonstrate their confidence and their ability to convey authority and expertise.

³⁰ F. M. Kay, C. Masuch & P. Curry, *Turning Points and Transition: Women’s Careers in the Legal Profession. A Longitudinal Survey of Ontario Lawyers, 1990 – 2002* (Toronto: The Law Society of Upper Canada, 2004) at 56.

With respect to self-confidence – fake it till you make it. Everyone else is just as scared. When you make a mistake (and you will) own it, learn from it and move on. Do not operate as if perfection is the only option.

- Linda Parsons, Q.C., '80 Executive Coach

Selling your Services

Introduction

There are lots of good resources for lawyers on how to move new opportunities to new matters by mastering how to sell their services effectively. To succeed as a partner, you need to be able to sell your services and your firm's services to expand your firm's business. Selling may not come naturally to you, but it is a process that you can learn to do well, the same way you learned how to close a transaction or bring an action to trial.

Here are some things to keep in mind:

Listen. You won't learn what your clients really need unless you listen to them. Ask them open-ended questions— What are you working on now? What's keeping you up at night? How is x news event affecting your team? Be interested in them and let them do most of the talking. Listening fosters trust. If you are able to demonstrate that you are interested in understanding what the client really needs, they are more likely to believe that you will be able to provide it.³¹

Uncover Client Needs. As you listen, try to identify your client's needs for legal services that you or your firm could offer. The ability to analyze a client to achieve a precise understanding of their needs is of significant importance.³² Listen to what they explicitly say about their substantive legal needs, but also try to uncover the subtext – Do they need it done really quickly because they sat on it for too long? Are they inexperienced in the area and so need a 'name brand' to give them credibility? If you can identify their unspoken needs, you can tailor your own or your firm's pitch much more effectively.

Articulate How You Can Help. Spend thought and effort on articulating a persuasive statement or pitch as to how you can help. You are not selling soap; you are selling a complex blend of expertise and experience to someone who has a significant problem or project, so you need to be thoughtful, nuanced and articulate.

Advance the Process Step by Step. Learn the step-by-step process that takes you from your first contact to actually opening a new file with a client. We do not start on page one with an initial contact and then immediately skip to the end and get a referral for the legal work. Successful rainmakers know it is a longer process, where you plan the next step on the ladder and measure success in increments.

³¹ Jim Hasset, *Legal Business Development: A Step by Step Guide* (Boston: The Advertraining Group, 2006) at 52.

³² John Gelagin, "Good News, Lawyers Don't Need to Sell Used Cars to be Effective at Business Development" online: <<http://www.findlaw.com.au/articles/706/good-news-150-lawyers-don146t-need-to-sell-used-ca.aspx>>.

Invest Time and Don't be Discouraged by Failures. Understand that most approaches do not end in a referral of work. This is true even for the best rainmakers. Do not get discouraged. You need to make many unsuccessful approaches in order to have a successful one. Think of these unsuccessful attempts as part of the learning process. Each time you make a pitch, that experience makes the next pitch that much easier.

Women's Perspective: What are the Challenges and Opportunities in Selling Services?

Listening and meeting the needs of clients. Many women excel at listening, discerning and meeting the needs of others. You can use this to your great advantage in the business development area to uncover spoken and unspoken needs of your clients that others may miss, so that you can craft your message correspondingly better.

Communication Skills: Many women have superior communication skills in relationships. This will assist them in articulating how they can meet their client's needs in an effective way.

Bridging the credibility gap. Many women feel that they do well building relationships and uncovering needs in the sales process, but when it comes to actually 'closing the sale' they may suffer from the implicit assumptions discussed above; that is, that men have more credibility and authority. If you think this applies to you, plan for it. Think about what you need to do to give yourself the credibility boost that might not otherwise exist. Finding ways to emphasize your experience and recognized reputation or credentials, finding a mentor with the requisite authority to advocate for you, and upgrading your communication or presentation style to enhance your authority and credibility are just a few strategies to consider.

Checklist for Building a Career Plan

Introduction

It is now time to begin to draft your Career Plan for the next few years of your practice. Your goal is to become a partner and you have been introduced in this Guide to some of the many things you need to understand and to do so that you and your practice are ready for partnership consideration.

As noted above, setting measurable goals to help you move towards partnership will give you the best chance of success. A Career Plan helps you map out your own path to success. Every firm is different so in the checklist below, we have set out some suggested topics for you to cover in your Career Plan. You may wish to consult the sample career plan at Appendix 1 to assist you in putting your career plan on paper.

Checklist for Career Plan

The following is a checklist to assist you in developing your own Career Plan:

Consider your personal audit

- What personal characteristics do I have that need improvement to move towards partnership?
- Do I need additional resources at home to free up time for my practice?
- Should I consider a flexible work arrangement or extended track?

- Do I need to seek out a mentor or sponsor?
- What requests should I make of my mentor in the coming year?

Consider your practice audit

- Do I have enough billable hours? If not, what does my target need to be?
- Do I perform non-billable hours that are valued by the firm?
- Am I delegating enough hours?
- Do I need to improve the financial management of my practice?
- Is my practice focused in an area that will be sustainable for me and the firm in the coming years?

Consider client opportunities

- What existing clients can I work with to secure business for the future?
- What existing referral sources should I continue to nurture?
- What contacts do I have that are potential future referral sources and how can I grow those connections?
- Who are the peers, co-workers and those I know from my personal life that could provide some business for me?

Marketing yourself

This year I will do the following to market myself:

- writing and speaking
- specialist training
- joining organizations in my field of specialization.

Using Your Mentor or Sponsor Relationship Effectively

Introduction

Having a mentor to provide advice and coaching and a sponsor to champion you is very important in your progress to partnership. These important individuals can not only assist you in understanding the firm and in preparing your personal and practice audits but also provide support during and after your performance review and while you develop and manage your client base. This section talks about mentoring and sponsoring and what you can get out of such a relationship.

What is a Mentor?

A mentor is a trusted, experienced professional who provides advice, encouragement and coaching to a more junior colleague (the “mentee”). A mentor can be a source of valuable information and advice concerning the demands of the profession generally, and the particular expectations of the firm where the mentee works. A mentor will lead by example, demonstrating to the mentee what she should strive to achieve in order to attain success within the firm. A mentor will support and counsel the mentee to help to overcome potential roadblocks to success. A mentor will sometimes champion the mentee with clients and other partners in the firm, assist in opening doors to rewarding work assignments, and exercise organizational leverage to help the mentee advance professionally, ideally including entry to partnership.

Other times, a mentor will be an essential source of wisdom, guidance and support who can help get you through some of the more difficult and challenging periods.

What is a Sponsor?

While some mentors may also be sponsors, not all sponsors are mentors. While mentors provide support for you, a sponsor becomes your champion and helps you advance.

A sponsor is someone who is influential in your law firm or in business. Ideally, a sponsor has significant influence over the decisions made in your law firm, including decisions around admission to partnership. A sponsor opens doors, advocates, protects and promotes an individual in his/her career path. In doing so, a sponsor puts his or her prestige and power on the line to champion another.

Why Should I Have a Mentor and a Sponsor?

There is a strong and well established link between mentoring and sponsoring relationships and career success. Lawyers consistently identify strong mentoring and sponsoring relationships as extremely advantageous, if not key, to developing a successful practice and achieving partnership.

Among other advantages, mentors play a key role in helping less experienced lawyers to gain self-confidence, to develop a profile both within the firm and the profession generally, to understand and adapt to firm culture, and to develop valuable social and professional networking relationships. Sponsors are key to helping junior lawyers build their client base and raise their profile both within the firm and with current and potential clients.

A mentoring and sponsoring relationship can accelerate a junior lawyer's trajectory on the partnership curve and help to develop the skills needed to develop a satisfying and successful legal career.

In many law firms, there is a direct link between a good sponsoring relationship and the referral of challenging work from important clients. A good sponsor will provide opportunities to showcase the mentee's talent and ultimately open the door to key client contacts. It can be particularly helpful to have several mentors and sponsors at different stages of their careers and with different skills to provide you with the most help on the path to partnership.

Sponsorship is particularly key for women lawyers who wish to advance into partnership. As research from Catalyst indicates,³³ even though women start out behind and often remain behind men, even with mentoring, a sponsor can propel a protégé to the top of the list: "Done well, sponsorship can serve as a highly effective intervention to accelerate women's career velocity. Lack of sponsorship is one indicator of what's really been holding many women back—exclusion from organizations' most influential networks. Sponsorship can finesse access to these powerful networks, providing impressive benefits to leaders, high-performing employees and organizations themselves".

³³ Heather Foust-Cummings, Sarah Dinolfo, Jennifer Kohler, *Sponsoring Women to Success* (New York: Catalyst, 2011) at 2 [Sponsoring].

Finding a Mentor

Many firms have a formal new associate mentoring program in place with written guidelines, a program coordinator and procedures for matching mentors with first year associates. In other firms, partners have designated juniors who work exclusively for that partner, who then fulfills the role of a mentor and sometimes as sponsor. In some firm environments, mentoring is more informal. The designated mentor may be a senior associate who is more of a “buddy” or “pal”, responsible for checking in occasionally to see how the mentee is getting along. In some firms and for sole practitioners, a formal or informal mentoring program may be entirely absent.

At the outset, it is important to understand and educate yourself about the particular mentoring program that your firm offers. If there is a written policy or program, review it to ensure that you understand how the program operates, your obligations and those of your mentor or sponsor, and the role of the program coordinator. Consider asking some of the other associates about their experiences, their perceptions of its effectiveness, and for their insights about how to ensure that you get the maximum benefit from it.

Determine whether there is a procedure for dealing with mentoring relationships that do not work. Simply because a lawyer has been assigned by the firm as a mentor, this does not guarantee that the relationship will succeed. If the mentoring relationship is not a success, do not hesitate to ask for a different mentor.

Even where the firm has a formal mentoring program that matches associates with mentors, that does not exclude the possibility of developing other mentoring relationships. Indeed, it can be very advantageous to have the benefit of a number of different mentors from within the same firm. Sponsoring relationships in particular tend to arise informally, as a result of a more junior lawyer earning the respect of a more senior lawyer through impressive work. Most successful lawyers typically had the benefit of several different mentoring and sponsoring relationships, both formal and informal.

Finding a Sponsor

Given the nature of the sponsor/protégé relationship, finding a sponsor is not always an easy task. Generally, sponsors and protégés find each other through working together and developing a working relationship based on honesty, confidence, trust, communication and commitment.

In seeking a sponsor, look closely at those partners with whom you are working. See if any have the status and influence within the firm that will make them an effective sponsor for your advancement into partnership. Analyze what kind of working relationship you have with each and whether the relationship is marked by the qualities listed above. Tell him or her that you want to become a partner and ask for their help. Be willing to listen to advice that you are given and to seek out and act on opportunities provided. Ensure that when you do take up an opportunity, that your work is stellar. Above all remember, “While sponsorship can open doors for high performing individuals, simply providing someone with an opportunity does not guarantee success. It’s up to the person being sponsored to deliver, once given the opportunity.”³⁴

³⁴ Sponsoring, *ibid.* at 5.

Your Role as Mentee/Protégé

Once you have established a relationship with a mentor or sponsor, it is important to fulfil your end of the bargain. Try to follow the advice that you receive. Make the most of whatever opportunities are offered to you as a result of the relationship. For example, if your mentor or sponsor provides an opportunity to develop your skills and to meet individuals who would be helpful to your career development, such as meeting an important client, take the opportunity.

Observe how your mentor or sponsor deals with clients, colleagues at the firm and other counsel. Try to learn from their example.

Ask for regular feedback from your mentor or sponsor. Seek frank and constructive criticism.

Continue to assess your career plan to ensure that you are filling in the gaps in your experience that are necessary in order to succeed at the firm. If you are not making progress, consider whether you need to find an additional mentor with particular expertise in other areas to address those specific deficiencies. Also, do not be afraid to seek out opportunities for yourself.

It is also important to be forthcoming about your career plans. Tell your mentor or sponsor that you want to become a partner.

Women's Perspective: Challenges and opportunities in finding mentors and sponsors

Predominance of Men Partners: As we are all aware, it is still the case that most managing partners of law firms are men; most of the most senior partners are men; and most of the power figures in the partnership are men. The percentage of women partners in Canada and the US ranges from less than 16% to approximately 20% in large and medium size firms. Thus, it will be necessary for most women to have a man as a sponsor if they want to advance into partnership. Such a partner will have access to the opportunities and clients that matter most and also will have a voice when it comes to partnership admission. It may be more difficult for women associates to access such sponsors or to develop strong sponsor/protégé relationships with male sponsors. If you are lacking a strong male mentor or sponsor at your firm and if there is no formal mentoring program for senior women associates, speak up about it at your performance review, talk to your practice group head or your managing partner about whom you wish to be mentored by. Do not hesitate to approach a prospective mentor or sponsor directly – enlist help from more senior lawyers if necessary.

Seek out male mentors for whom you have done excellent work and work hard to build rapport and find commonalities outside the work context, as you would with clients. Ask for advice and be specific about your needs for help and support.

Male Partners have a different experience in law firms: While a senior male partner may make an excellent sponsor, he may not understand some of the issues you face as a woman in the firm as he has not experienced such things as gender bias, exclusion from informal networks, lack of role models, lack of leadership opportunities etc. For these issues, you should seek out a senior woman either at your firm or elsewhere to help you.

Women Partner Mentors can get overwhelmed with many mentees: You may be fortunate enough to have senior women partners in your firm who can act as sponsors or mentors to you. However, since many women associates prefer women mentors, such women often get overwhelmed at being asked to mentor numerous younger women and may not be able to deliver the time and attention needed. If this is the case at your firm, there are a few alternatives to consider. Some of these would include proposing the establishment of “mentoring circles” made up of groups of women who participate in group mentoring; approach lawyers in your firm closer to your year of call as “peer mentors” or consider seeking a woman outside the firm to assist you while asking for a male mentor at the firm.

If your firm does not have sufficient mentors or sponsors, consider utilizing outside consultants and coaches.

Conclusion

The path to partnership is complex and requires knowledge of your firm and yourself, planning, the support from members of the firm, and hard work and dedication. However, for those who wish to become partners, the work that is required to get there is worthwhile.

Women often comment about the challenges of progressing in their firms. Common challenges raised include the lack of transparency about processes and criteria used by the firm to assess an associate’s performance, not knowing what is expected of an associate and not having the business skills to build a sustainable practice. We hope that this Guide will provide a roadmap to assist you in navigating your firm’s expectations, assessing your personal and practice contributions to the firm, planning your path and ensuring that you have the resources to attain your goals. Always remember that the decision to become a partner is not only the firm’s decision. It is also your decision, and it should be informed.

In hindsight, I wouldn’t have worried as much (so much!) and I wouldn’t have been in such a hurry. I would have enjoyed life more, worked less. Partnership would still have come, in time.

- Rita Andreone, Q.C., Partner, Lawson Lundell

Appendix 1 - Individual lawyer career plan

Date:

Expertise

What are your areas of expertise?

Sources of work - Describe

Internal (e.g., lawyers, practice groups, cross-selling)

External (e.g., industry association, referral network, social network, volunteer activities)

Business Development Goals: Describe briefly three or four goals and objectives.

Analysis of goals (SMART: Specific, Measurable, Attainable, Realistic, Timely)

What are the most important goals (i.e., prioritize and identify as long- and short-term goals)?

What are the resources needed to achieve the goals (e.g., skills, technology, staff, CPD, financial, mentoring)?

How will the goals be achieved (e.g., CPD, speeches/presentations, conferences, articles/publishing, networking, firm committees)?

Docketing, Billings and Revenue

Total Hours

Chargeable: Annual _____ Daily: _____

Non-chargeable: Annual _____ Daily: _____

Projected Revenues: Annual _____

Business Development – Profile Building

Membership in professional/bar organizations (shall join or maintain).

Community, civic, political or charitable organizations (shall join or maintain), which have the potential of generating business or enhancing the firm's image.

Social or recreational organization(s) (shall join or maintain) that have the potential of generating business or enhancing the firm's image.

Trade and industry associations (shall join or maintain).

Speech or presentation to the following group(s) or teach a class in the following subject(s):

Write books or article(s) for publication.

Business Development – Relationship Building

Initiate social or business contact with existing or potential client(s) with whom I have not done so in the past three months

Existing or potential referral source(s) with whom I have not done so in the past three months.

During the next year, engage in existing client development activities:

Practice specific cross-selling, client roundtables, newsletter, legal cost analysis, managing client relationships

Prospect targeting, research and follow-up, legal audits, presentation teams

New client development, RFP's, presentations, etc.

Internal marketing activities (marketing training/mentoring, firm database, marketing committee, internal newsletter, etc.) during the next year.

Continuing Professional Development/Skill Improvement

Legal Education

Education required to increase expertise in current practice area(s), how it will benefit the firm, where the education is available and approximate cost.

Education required to increase expertise in practice area(s) where you wish to practice, how it will benefit the firm, where the education is available and approximate cost.

How can you assist in the education of others by in-house seminars or by a formal mentoring program to train other lawyers and paralegals, outline your proposal and how it would benefit the firm?

Industry/Business Education

Leadership, writing, speaking or management education

Practice group, committee, knowledge management, mentoring or other firm activities.

Describe education to improve your technological, writing, speaking, or management skills; how such knowledge would benefit yourself and the firm, where the education is available and approximate cost.

Pro Bono

Identify pro bono activities (volunteering, Board member, politics, college/university, pro bono legal services).

What is the benefit to you or the firm?

Appendix 2 – Checklists

Partnership Admission Policy and Practices

- Identify and obtain copies of relevant policies, such as partnership admission policies, that outline criteria and process; billable hours targets policies and business origination credit policies.
- Identify unwritten policies and understand the core culture of your firm – talk to your mentors, pay attention to what behaviors receive praise, and seek guidance from someone who has recently been admitted to the partnership.
- Evaluate the criteria for partnership against your own skills and abilities. Understand what each criterion means within your firm and how “success” is measured. Most firms consider some or all of the following as relevant criteria:
 - a sustainable practice;
 - financial management skills;
 - commitment and dedication;
 - client management;
 - profile in the marketplace (via speaking, writing and committee work);
 - business development;
 - responsibility for or carriage of matters or clients;
 - non-billable activities;
 - leadership and delegation;
 - volunteer activities;
 - strong analytical skills, judgment and ethics; and
 - legal expertise.
- There may be a weighting of the criteria for admission to partnership. Gather as much information as possible about the weighting of criteria so that you understand the expectations of the firm.
- Identify characteristics of successful associates/partners practices that you can emulate.
- Be aware of the demographics of your practice group and whether there is space for you in the partnership.
- Be aware of the needs of the firm’s clients and how your expertise can contribute.
- If relevant, determine how maternity and parental leaves and flexible work arrangements may impact on your advancement toward partnership. The firm may have a strong commitment to work/life balance, but taking a maternity or paternal leave may still impact your path to partnership. This is largely due to the fact that lawyers on extended leaves, men or women, are not actively developing their skills as lawyers, or their client contacts, and as a result may require a longer period of time to gain the appropriate competencies to be considered for partnership.
- Understand whether your firm has income partners and/or part-time partners and how those options are relevant to your progress. Identify the critical differences between equity, income and

part-time partners in order to make informed choices about your options in your progress to partnership.

- Identify what kind of non-billable work is most valued in your firm.
- Understand the business development expectations for partnership candidates (e.g., When are you expected to begin bringing in some business and how much business are you expected to bring in? Does maintaining important existing client relationships count? If so, how?).
- Understand how performance evaluations are taken into account in the partnership admission process.
- Identify coaching, training and mentoring opportunities offered by the firm and the role that these may have on your progress to partnership.

PERSONAL AUDIT

SATISFACTION WITH WORK

When tracking your personal development towards partnership, you may wish to consider the following:

- Are you enjoying your practice area?
- Do you enjoy working with clients, taking responsibility for their legal problems and providing top-notch service to them?
- Do you enjoy business development and the process of finding new clients and generating new work?
- Do you like the firm where you are practising and the people you are practising with?
- What are your strengths? For example:
 - I am a strong team player.
 - I am ambitious.
 - I can build rapport with clients.
 - I am effective at providing client services.
 - I can lead a project.
 - I am a good team player.
 - I am detail oriented.
 - I like to market myself.
 - I am a good communicator.
 - I am a good writer.
 - I have strong time management skills.
 - I can multitask and work well under pressure.
 - I have a good sense of humour.
 - I work well to deadlines.
 - I am good at networking.
 - I am good at nurturing relationships.
 - I am good at problem solving.

WORK/LIFE EFFECTIVENESS

- What are the billable and non-billable hour expectations of an associate and a partner in your firm?
- Are you able to meet these billable and non-billable hours expectations?
- If you find the hours challenging because of family obligations, do you have:
 - sufficient child care?
 - resources to assist in emergency situations, such as emergency child care?
 - resources to deal with contingencies, such as parents or children who are ill?
 - resources to assist you in household management and childcare tasks?
 - If applicable to you, does your partner, spouse or significant other support your goal of being a partner?

MENTORS, SPONSORS AND CHAMPIONS (SEE ALSO SECTION ON USING MENTOR OR SPONSOR RELATIONSHIPS EFFECTIVELY)

- Are you satisfied with your “mentorship” relationships at the firm? Have you tried to seek out a mentor in a powerful position who will champion you?
- If you do not have an internal mentor or if that mentoring relationship is not successful, have you sought a mentor in the broader legal community through an external program?
- Do you have key work providers with whom you have a good relationship and who are providing you with appropriate work opportunities? Do you understand the work allocation process at your firm? Do you have a strategy to obtain the work opportunities that will assist in your advancement? If not, have you considered seeking assistance with this from your practice group leader or mentor?

PRACTICE AUDIT

HOURS AND CLIENTS

Annually, review your practice over the last year as follows:

- How many hours have you billed?
- How do your hours relate to firm billable hour targets?
- Which clients have you worked for and how many hours for each?
- Are your clients on the firm’s list of major clients? If not, will this be a problem?
- Is your practice appropriately diversified or specialized for your year of call and in light of your overall career plan and future goals?
- How many hours of work do you get from more senior partners at the firm? Are they significant partners?
- How many hours do you generate yourself?
- How many files are you the billing lawyer on?
- How many hours of work did you delegate to more junior lawyers?
- How many significant matters were you the lead on?

- Are you the relationship lawyer for any clients? Have you attracted new matters or new clients yourself?
- Are you a member of any significant client teams?
- Are you a leader of any significant client teams?
- Are there matters that were generated as a direct result of your efforts with an existing client or clients that you brought to the firm? If so, how many hours did these matters account for?
- If you are moving towards specialization, will this specialization be sustainable and feasible as a partner? Will you be able to generate enough business in that area to keep yourself and others busy over the long-term?

TIME AND FINANCIAL MANAGEMENT OF YOUR PRACTICE

- Do you capture your hours on a daily or weekly basis?
- If applicable, do you submit your hours on a timely basis?
- Do you bill promptly for files on which you are the billing lawyer?
- How much of your time was written off in the last year?
- How much of your time was premium billed? How long are your receivables outstanding?

If you don't know, how can you find out?

INTERNAL NETWORKING

- List senior, influential work providers who have referred you work this past year.
- List how you have marketed yourself internally during the past year.
- List your sponsor or sponsors at the firm who can be an advocate for you and help you build your profile internally. If you do not have a sponsor, identify someone who you will ask to fulfil this role. List the role you play on any key firm committees.

BRANDING

- List how you have increased your external reputation and profile in the past year by:
 - writing and/or speaking on your areas of expertise;
 - sitting on any corporate or not-for-profit boards;
 - participating in any industry groups related to your practice; and
 - participating in volunteer or social activities related to your practice or to potential client contacts.

BUSINESS DEVELOPMENT

- Did you make a business development plan? Did you follow it?
- What are the expectations at your firm for associates and partners regarding business development? List the business development activities with clients that you carried out in the past year and rate their results, if any.
- List the external networking activities you engaged in over the past year with potential clients or contacts. Which were the most effective?
- List internal and external resources you have used to help you develop business.

- If your firm has business development resources that are specific to women, list those you have utilized.
- If your firm does not have business development resources that are specific to women, list any you initiated.
- Have you asked for coaching in the area of business development or have you arranged it on your own at your own expense?