Mentoring Plan for Attorneys "Hanging a Shingle"

Revised May 2026

NOTE: If you wish to delete or add activities not listed, confirm with CAMP or your Sponsoring Program facilitator, especially if you plan to apply for CLE Credit Certification.

How to Use This Plan

This curriculum guides mentor-mentee pairs through eleven topic areas tailored to attorneys launching a solo practice. Check ☐ in the right column as each item is completed. Items marked **REQUIRED** must be completed; for others, complete the minimum number specified. All hyperlinked resources are preserved and clickable.

1. INITIAL PLANNING MEETING, PERSONAL AND PROFESSIONAL DEVELOPMENT (COMPLETE ALL)

Action	Mark Completed
Schedule an initial meeting — in person where practical, or virtually — to prepare a customized mentoring plan. Use the CAMP Initial Goal Plan & Meeting Guide to develop goals for the mentoring relationship.	☐
Discuss best communication methods for each participant and consider scheduling all remaining meetings and activities for the mentoring term.	☐
If Mentee has already started a solo law practice, encourage them to complete the Colorado Lawyer Self-Assessment and review the Colorado Lawyer Self-Assessment Mentoring Plan to identify topic areas of need and interest.	☐
Mentor should introduce Mentee to the office's attorneys and staff (if not already done) where practical.	☐
Include in the meeting a discussion about inclusiveness and diversity, work-life integration, mental health and substance use issues facing lawyers, and the services available to attorneys regarding these health issues.	☐
Build rapport using the following five-step framework: 1. Shift your mindset to "I am worthy of mentoring." 2. Look for indicators of shared humanity with your mentoring partner. 3. Identify one thing you can appreciate about your mentoring partner.	☐

Action	Mark Completed
4. Listen to understand — not just to respond. 5. Be open, not transactional.	
Discuss communication norms for the mentoring relationship: • Preferred platforms (email, text, video call, in-person). • Response-time expectations and after-hours boundaries. • How to handle cancellations and rescheduling. • Confidentiality expectations within the mentoring relationship.	☐

2. THE COLORADO BAR AND LEGAL COMMUNITY (COMPLETE AT LEAST ONE)

Action	Mark Completed
Attend a Solo/Small Firm bar association section meeting or networking event for legal entrepreneurs with Mentor. Introduce Mentee to other solo attorneys. Discuss the advantages of bar involvement and the many local, state, and national associations available to solo practitioners. • Discuss which sections and committees are most relevant for Mentee's practice area. • Explore how bar involvement can generate referrals, mentorship, and community for a solo practitioner. • Discuss how to get involved in leadership roles over time.	☐
Attend Trust Account School offered by the Office of Attorney Regulation Counsel. Debrief with Mentor on key takeaways and how trust account management applies to the specific fee structures Mentee plans to use.	☐
Attend "Hanging Your Own Shingle" or a comparable course offered by CBA/CLE. Discuss takeaways and how they map onto Mentee's specific practice launch plan.	☐
Discuss online and virtual community-building for solo practitioners: • LinkedIn presence and professional networking best practices. • Solo practitioner online communities, listservs, and Slack groups. • Avoiding isolation through intentional virtual connection.	☐

3. DEVELOPING PROFESSIONAL IDENTITY & LAWYER WELL-BEING (COMPLETE AT LEAST TWO)

Action	Mark Completed
Professional Identity Formation: Help Mentee articulate their "Professional Identity" as a solo lawyer. Use John Bliss' The Professional Identity Formation of Lawyers to facilitate discussion. Explore: • Why did Mentee choose the profession of law, and what do they seek to accomplish? • How does Mentee define "professional success" — and whose input shaped that definition? • What characteristics, skills, and attributes will enable their success? • Who in Mentee's personal and professional community will support them?	☐
Well-Being Assessment: Engage Mentee in a self-reflective exercise on the six dimensions of well-being. Use the ABA Well-Being Toolkit for Lawyers and Legal Employers to build an action plan addressing self-identified gaps: • **Emotional:** Recognize and manage emotions; seek mental health support when needed. • **Occupational:** Cultivate satisfaction, growth, and financial stability in work. • **Intellectual:** Pursue continuous learning and creative challenges. • **Spiritual:** Develop a sense of meaning and purpose. • **Social:** Build connection, belonging, and a well-developed support network. • **Physical:** Maintain activity, nutrition, sleep; minimize harmful substance use.	☐
Resilience Planning: Engage Mentee in a reflection on resilience. How does Mentee assess their own resiliency? What factors account for it? Assist Mentee in developing a plan to improve. Consider: • Three Ways Lawyers Can Become More Resilient • Survival Skill No. 1 for Lawyers: Emotional Resilience	☐
Avoiding Isolation: Develop concrete strategies for staying connected as a solo practitioner: • Weekly coffee or lunch with an attorney in a complementary practice area. • Regular attendance at bar events, CLEs, or networking breakfasts. • Building a peer network of other solo practitioners for informal consultation and support. • Consider a co-working arrangement or office-share to reduce day-to-day isolation. • Identify a "sounding board" attorney for difficult matters where you need a second opinion.	☐
Defining Professional & Personal "Success": Work with Mentee to build a sustainable, fulfilling definition of success.	☐

Action	Mark Completed
• Traditional concepts of success (wealth, power, independence) and their limits — from Scrooge to Foster Kane, conventional goals often fall short of true fulfillment. • Unconventional paths: those who followed purpose-driven routes and found ultimate satisfaction in the work itself. • Finding your definition: picture yourself with all time and resources — what would you do? How would you find satisfaction? • A foundation for goals: build 2–3 primary goals from your definition of success. Your definition of success also dictates your definition of failure — you've only failed if you've given up.	
Assessment of Current Professional Identity: Ask Mentee to answer "What do you do?" Work together to expand the answer to include a broader view of Mentee's strengths, interests, and professional passions — and how launching a solo practice reflects all of those.	☐
Financial Well-Being as a Solo Practitioner: Discuss financial health as a dimension of overall well-being: • Managing cash flow variability and the psychological impact of financial uncertainty. • Separating business and personal finances from day one. • Student loan repayment strategies, including income-driven repayment and PSLF eligibility. • Long-term financial planning: retirement accounts (SEP-IRA, Solo 401k), disability insurance, emergency funds. • Setting aside quarterly estimated taxes as a self-employed attorney.	☐

4. COLORADO RULES OF PROFESSIONAL CONDUCT, PROFESSIONALISM, AND CIVILITY

Action	Mark Completed
REQUIRED (complete with at least one activity from the list below)	
Core Ethics Discussion (Required): The pair should discuss: • The distinction between the Colorado RPC and general professionalism. • Attorney obligations to the court, client, and opposing counsel. • Common ethical issues in solo practice and resources for resolving them. • Common grievance and malpractice "traps" and how to avoid them. • The benefits of carrying malpractice insurance and the consequences of going without it. • Technology competency obligations under RPC 1.1, Comment [8], including AI tools.	☐
COMPLETE AT LEAST TWO OF THE FOLLOWING	

Action	Mark Completed
Discuss how to screen for, recognize, and avoid conflicts of interest — including challenges specific to a solo practice and high-volume or unbundled service models.	☐
Work with Mentee to develop communication and leadership skills for professional working relationships with support staff, colleagues, and contractors. Consider: • Fire & Ice: An Associate's View of Partners • Pro Tips for Your First Assignment as an Associate • Six Ways to Work Successfully With Support Staff	☐
Discuss competency and professionalism during discovery, including e-discovery obligations, proportionality, and ethical production duties.	☐
Discuss preparing for negotiation: when and how it is initiated, how to involve the client, ethical obligations of negotiators, and the skills needed to negotiate effectively.	☐
Discuss the Colorado RPC as applied to unbundled and limited-scope services. Use: • Colorado Formal Ethics Opinion 101 • ABA Unbundling Resource Center • DU Unbundling Best Practices	☐
Discuss appropriate ways to handle situations where a lawyer believes another lawyer has committed an ethical violation or acted unprofessionally; the obligation to report misconduct; and how to handle pressure to act unethically.	☐
Discuss the grievance process and a lawyer's duty to cooperate with a disciplinary investigation.	☐
Have coffee with opposing counsel to practice discussing different points of view and objectives from both sides of a matter.	☐
Discuss the benefits of the Colorado Bar Association Ethics Hotline. *Certain members of the CBA Ethics Committee are available for brief discussion of immediate ethical dilemmas. Attorneys are asked to do their own research prior to calling. Call CBA at 303.860.1115 or 800.332.6736 (in-state only). Hotline responses do not necessarily reflect the thinking of the Committee as a whole.*	☐
Discuss AI-specific ethics in solo practice: • Client confidentiality when using AI drafting or research tools. • Obligation to verify AI-generated research and work product before filing. • Disclosure considerations for AI-generated work product. • Staying current with evolving bar guidance on AI and legal practice.	☐

5. LAW PRACTICE START-UP (COMPLETE AT LEAST TWO)

Action	Mark Completed
FINANCE: Starting a practice requires upfront investment. Work with Mentee to: • List essentials vs. non-essentials and their associated costs. • Build a first-year budget covering initial and monthly costs. • Develop revenue projections to set realistic income goals for year one. • Discuss funding options: personal savings, small business loans, credit lines, and phased launch strategies. • Identify when and how to reinvest revenue into the practice. • Set aside quarterly estimated taxes and understand self-employment tax obligations.	☐
MARKETING: You can no longer simply hang a shingle and expect clients to appear. Work with Mentee to: • Develop a marketing plan identifying target clients and referral sources. • Choose marketing channels aligned with Mentee's strengths: content, social media, networking, referral development. • Build in analytics: how to measure what's working and adjust the plan accordingly. • Discuss how a solo practice can differentiate itself on responsiveness, accessibility, and personal service. • Identify low-cost marketing tactics appropriate for a shoestring launch budget.	☐
OPERATIONS: Running a profitable, sustainable practice means running it like a business. Discuss: • Office structure options: home office, virtual office, coworking/office share, single-use client meeting space, formal office building. • How office structure reflects the character and personality of the practice. • File organization, matter management software, and opening new client matters. • Client communication systems and response-time policies. • Whether and how to contract administrative or paralegal support. • Policies and procedures that ensure smooth, consistent administration from day one.	☐
RISK MANAGEMENT: Every solo practice faces exposure. Discuss strategies to minimize impact: • Selecting a malpractice insurance provider and coverage options appropriate for solo practice. • Data security: cybersecurity basics, cloud storage, and breach response planning. • Physical document retention and storage policies. • Backup technology systems and disaster recovery planning.	☐

Action	Mark Completed
• Succession planning: what happens to clients if you are incapacitated? • Entity selection and tax implications for a solo practice.	
TECHNOLOGY: Technology is the present of law practice, not the future. Discuss: • Essential tech stack: practice management software (Clio, MyCase, etc.), e-signature, billing, secure client portal. • AI-assisted drafting and research tools: capabilities, limitations, and ethical obligations. • Virtual practice tools for serving remote or rural clients. • Cybersecurity hygiene: password management, MFA, secure file sharing. • How to evaluate and adopt new tools without disrupting workflows. • Free and low-cost technology options appropriate for a practice launch.	☐

6. LAW OFFICE MANAGEMENT AND IN-OFFICE PROCEDURES

Action	Mark Completed
REQUIRED (complete with at least one activity from the list below)	
Operational Best Practices (Required): Discuss law office management, preferably with a tour of Mentor's office if practical: • Time records and timekeeping discipline. • Records of client-related expenses. • Billing systems and invoicing cycles. • Client retainer and payment schedules; types of fee agreements. • Escrow and trust accounts; establishing a COLTAF; accounting, auditing, use of interest proceeds; proper procedures for handling client funds and property. • Filing systems and document management (physical and digital). • Document retention plan (see RPC 1.16A). • Calendar reminder and docketing systems; avoiding missed deadlines. • Information technology systems and cybersecurity basics. • Library and legal research systems, including AI-assisted tools. • Other resources: publications, seminars, equipment, CLEs.	☐
Financial Best Practices (Required): Discuss: • Start-up costs, including law practice software for billing, invoicing, calendaring, and organization. • Budget and financial planning for the first year; projecting revenue. • Law firm profitability and key financial metrics for a solo practice. • **Fee structures:** retainer, flat fee, contingency fee, unbundled/limited scope, subscription billing.	☐

Action	Mark Completed
• **Billing and collections:** how to take credit card payments, invoice drafting, collecting unpaid fees, third-party payors, court filing fees and other client expenses. • **Trust accounts:** COLTAF accounting, what goes in and out of trust, when to transfer funds, how to disburse, and ethical rules.	
Marketing Best Practices (Required): Discuss: • Law firm branding and personal branding. • Business card optimization and networking fundamentals. • Website building blocks and search engine optimization (SEO). • Blogging, social media, and email marketing. • Ethical considerations in lawyer advertising. • Importance of client referrals in building and maintaining a solo practice. • Low-cost, high-impact marketing strategies for a practice launch.	☐
Risk Management Best Practices (Required): Discuss: • Starting a small business: entity selection and tax implications. • Developing a business plan. • Taking on partners or of-counsel arrangements. • Selecting malpractice insurance and coverage options. • Succession planning, data security, and cloud storage. • Physical document retention and backup technology systems.	☐
COMPLETE AT LEAST ONE OF THE FOLLOWING	
Discuss the role and responsibilities of paralegals, assistants, virtual assistants, and other office personnel, and how to establish good working relationships with support staff and office-sharing colleagues.	☐
Discuss practices to maintain client confidentiality, including in remote and virtual work environments and when using cloud-based tools.	☐
Discuss how to prevent unauthorized practice of law issues with staff, including supervision of contract or virtual assistants.	☐
Discuss office dynamics and appropriate professional behaviors in coworking or office-sharing environments.	☐
Succession Planning: Discuss the importance of planning ahead for handling the practice in the event of retirement, disability, or death — including client notification obligations and the need for a designated successor attorney.	☐
Discuss the issues surrounding wrapping up a solo firm: how to protect yourself, advise clients of their rights, withdraw from cases, and manage ethical obligations during wind-down. See RPC 1.16.	☐

Action	Mark Completed
Discuss the benefits and challenges of a collaborative law practice or coworking space arrangement, including referral potential, camaraderie, shared costs, and independence.	☐

7. PROFESSIONALISM IN WORKING WITH CLIENTS (COMPLETE AT LEAST THREE)

Action	Mark Completed
Review the Colorado Principles of Professionalism together. Select at least three principles for deeper discussion and explore how they apply to Mentee's solo practice — including fee agreements, billing structure, and limitations of engagement in unbundled representation.	☐
Discuss the initial meeting with a potential client: gathering information, appraising credibility, evaluating whether to accept the representation, how to decline professionally, and making and accepting referrals.	☐
Discuss the importance of client communication and strategies to maintain it: returning calls and emails promptly, keeping clients informed, written communication practices, and the value of a formal communication policy.	☐
Discuss proper legal counseling: the duties and responsibilities of advising clients, and the respective roles of client and lawyer in decision-making.	☐
Discuss communicating with clients about the business relationship: billing, collections policies, and how to navigate financial conversations professionally.	☐
Discuss client-centered lawyering. Consider: • Do You Have a Client-Centered Law Practice? (Sullivan, 2016) • Who is My Client? Client-Centered Lawyering with Multiple Clients (Lawton, 2015)	☐
Discuss how to deal with a "difficult" client: recognizing warning signs, evaluating when to withdraw, avoiding ethical pitfalls, and professionally terminating a client relationship. See: The Art of Managing Clients — Even the Difficult Ones	☐
Discuss the termination of the attorney-client relationship: issues that arise mid-representation, necessary steps and documentation under RPC 1.16, and jurisdiction-specific withdrawal procedures.	☐
Discuss maintaining communication with clients after initial work is complete: updates in the law, relevant articles, check-ins while the matter is still live, and strategies for retaining long-term client relationships.	☐

Action	Mark Completed
Discuss how clients are the best marketing for a solo practice. Good representation and genuine relationships go a long way — discuss strategies for requesting referrals and maintaining relationships after a matter closes.	☐
Discuss how to handle mistakes made in representation: self-reporting obligations, malpractice implications, client notification, and the importance of corrective action.	☐
Discuss client communication in the digital age: client portals, secure messaging, managing expectations about AI-assisted work product, and accessibility and language access considerations.	☐

8. PUBLIC SERVICE (COMPLETE AT LEAST ONE)

Action	Mark Completed
Get acquainted with legal aid programs, local pro bono programs, volunteer boards, and other opportunities for civic and charitable legal service. Discuss the benefits of volunteer legal service: substantive learning, mentorship, networking, and possible referrals. Discuss how to overcome impediments such as time constraints and training in new practice areas. • Colorado Legal Services, Metro Volunteer Lawyers, and other CAMP-affiliated programs. • Colorado's aspirational standard of 50 hours per year and how to work toward it as a solo practitioner.	☐
Mentee attends a civic club or community service activity in which Mentor participates. Discuss the professional and personal value of engaging in volunteer legal service.	☐
The pair participates in a bar-sponsored or other volunteer program delivering legal services to the public (e.g., legal clinic, self-help center, expungement fair). Discuss the reasons for making time for this work.	☐
Discuss opportunities as a solo practitioner to engage modest-means clients and advance access to justice in Colorado: • How flat-fee, unbundled, and limited-scope service models can make legal help more affordable. • Sliding-scale fee arrangements and how to implement them ethically. • The solo practitioner's unique position as a bridge between underserved communities and the legal system.	☐

9. DEVELOPING A COMPETENT PRACTICE

Action	Mark Completed
Zones of Competency Analysis: Evaluate how Mentee assesses their legal competencies. Develop an analysis of practice areas, matter types, client types, and Colorado judicial districts where Mentee feels competent. Create a plan to regularly revisit and update this analysis.	☐
Long-Term Competency Growth: Identify areas where Mentee does not yet feel competent but wishes to improve. Generate a long-term plan including CLEs, co-counseling, supervised practice, and mentorship resources.	☐
Short-Term Competency Plan: Develop a plan for situations where Mentee is approached to handle a matter outside their current competency zone. Include educational resources, co-counsel options, referral networks, and supervising mentors.	☐
Discuss bar association involvement as a means of developing referral relationships and competency networks — local, state, and national, including any specific to Mentee's practice area.	☐
Technology Competency (see Colorado RPC 1.1, Comment [8]): • What AI-assisted research or drafting tools are available and appropriate for Mentee's practice? • How to critically evaluate and verify AI-generated output before relying on it. • Staying current: CLE resources, bar technology committees, and legal technology publications.	☐
Add Other: ____	☐
Add Other: ____	☐

10. DIVERSITY, EQUITY, INCLUSION, AND ACCESSIBILITY (COMPLETE AT LEAST TWO)

Action	Mark Completed
Discuss what diversity, equity, inclusion, and accessibility mean to both Mentee and Mentor, and how these concepts manifest in the legal profession. Create a safe space for conversation on how the profession is incorporating these values and how it can continue to improve. Describe an ideal practice based on these principles.	☐

Action	Mark Completed
Discuss the dimensions of identity for Mentor and Mentee. Which identities are most salient? How have they served each person in the legal profession? How have they created challenges or limitations?	☐
Discuss roadblocks and challenges each may have experienced due to underrepresented identities. What strategies were used? What resources were helpful? What was missing, and how might those gaps be addressed?	☐
Engage in a cultural empathy self-assessment using the Cultural Competence Self-Assessment Checklist. Discuss how cultural empathy supports effective legal representation and a more equitable legal community.	☐
Attend a diversity awareness or training workshop or CLE together. Discuss takeaways and next steps. See: • CBA-CLE Equity, Diversity & Inclusion Courses	☐
Discuss various career paths and how they relate to Mentee's personal and professional identities and goals: • Examine resources for underrepresented attorneys in organizations appropriate to Mentee's path. • Discuss how solo practice, in particular, can be structured to reflect Mentee's values and serve underrepresented communities.	☐
Discuss DEI as a practice design choice for solo attorneys: • How accessible fee structures, flexible scheduling, and language access can make solo practice more equitable. • Serving clients from underrepresented communities: cultural competency, trauma-informed communication, and referral networks. • How to create a welcoming client experience that reflects inclusion from the first intake call.	☐

DEI Resources

Videos:

- Reimagining Law: DEI in the Legal Profession — What's Working and What Isn't
- Reimagining Law: Systemic Racism in the Legal Profession
- Reimagining Law: Supporting LGBTQ+ Legal Professionals
- Reimagining Law: Creating a Sense of Belonging in the Legal Profession
- Reimagining Law: How Lawyers Can Combat Discriminatory Behavior

Articles:

- Commission's DEI News and Articles
- 3 Ways Lawyers Can Promote DEI with the CBA Racial Justice Coalition
- Inclusive Language is Allyship

American Bar Association:

- Bias Interrupters Project — You Can't Change What You Can't See: Interrupting Racial and Gender Bias in the Legal Profession
- Model Diversity Survey from the Commission on Racial and Ethnic Diversity in the Profession
- Implicit Bias Videos and Toolkit from the ABA Diversity and Inclusion Center

11. INTEGRATION AND DEVELOPMENT OF "WHOLE-PERSON LAWYERING"

Action	Mark Completed
COMPLETE AT LEAST TWO OF THE FOLLOWING	
This component addresses the unique contribution of the Mentee to the legal profession while working with the Mentor to shape an approach that expresses the whole person as a lawyer. Explore how the Mentee's unique interests, history, and talents influence their perspective and practice: • What are your values and how do they fit with your choice to become an attorney? How are they expressed in your solo practice? • Do you have a spiritual context — a religion, relationship with nature, or guiding philosophy? How does it shape why and how you practice? • What are your hobbies and how do they connect with your professional life? Do you use them to offset stress? Do they relate directly to your practice? • What talents express the most essential parts of your personal identity? Do you feel you are fully expressing all dimensions of your perspective and experience? • What are the key relationships in your life? How are they integrated (or not) into your professional life? • What would your ideal integration of personal and professional life look like? Or are these interests best served separately? • How does your history shape why you became a lawyer? How does it affect your practice today? • How do your hopes and dreams for the future affect your professional decisions? • At the end of your career, what would you like to have accomplished? Has this changed over time? • Do an activity related to the Mentee's personal interests to build the mentoring relationship outside a formal legal context.	☐
Discuss whole-person practice as a competitive advantage for a solo attorney: • How a clearly articulated identity and values make a practice more authentic and attractive to the right clients. • How hobbies, community involvement, and life experience can become referral pipelines. • How personal sustainability — boundary-setting, rest, creativity — is a business strategy for a solo practitioner, not a luxury.	☐
Discuss the unique whole-person challenges of running a solo practice:	☐

Action	Mark Completed
• The psychological weight of being the sole decision-maker and the importance of building a peer network. • Managing the isolation that can come with solo practice and intentional strategies to counteract it. • Recognizing when the demands of solo practice are affecting personal well-being and what to do about it. • COLAP and other confidential resources available to Colorado attorneys.	

This mentoring plan is a living document. Pairs are encouraged to revisit goals, adjust activities to fit emerging needs, and document their progress throughout the mentoring term. For questions, modifications for CLE credit, or program support, contact the Colorado Attorney Mentoring Program (CAMP).