Mentoring Plan for Lawyers Transitioning Practice Areas

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 making a practice area transition. 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 and consider scheduling all remaining meetings and activities for the term.	☐
In tailoring the plan to Mentee's interests, discuss long-term career goals and identify ways to achieve them — with particular attention to how the practice area transition fits into a broader professional trajectory.	☐
Mentor should introduce Mentee to the office's attorneys and staff (if not already done) where practical, including introductions to colleagues in the new practice area.	☐
Include a day-in-the-life discussion: work-life integration, mental health and substance use issues facing lawyers, and the services available to attorneys regarding these health issues — including how career transitions can heighten stress and the importance of proactive support.	☐

Action	Mark Completed
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. 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 meeting of an organized bar association or other attorney networking event — specifically a section meeting in the lawyer's new or intended practice area. Introduce Mentee to other attorneys in attendance. Discuss the advantages of bar association involvement and the many local, state, and national associations available, including any in Mentee's target practice area. • Identify the two or three bar sections or specialty organizations most relevant to the new practice area. • Discuss how bar involvement in the new area can accelerate credibility-building and referral network development. • Explore online communities, listservs, and national associations specific to the new practice area.	☐
Visit the local courthouse(s), particularly those where Mentee may appear in the new practice area. Make introductions to members of the judiciary, court personnel, and clerks of court. Discuss customary rules of civility and etiquette in court and among lawyers and judges in the community. • Discuss how courtroom culture and expectations may differ from Mentee's prior practice area. • Cover local court rules, standing orders, and e-filing procedures relevant to the new area.	☐
Discuss online and virtual community-building for the transition: • LinkedIn profile updates to signal the practice area shift professionally. • National online communities and forums for the new practice area. • How to use content (articles, posts, speaking) to build visibility in the new area.	☐

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

Action	Mark Completed
Professional Identity Formation: Help Mentee articulate a "Professional Identity" that reflects both their prior experience and their new direction. 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" in the new practice area — and whose input shaped that definition? • What characteristics, skills, and attributes will enable their success in the new area? • Who in Mentee's personal and professional community will support them through the transition?	☐
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 — especially during the uncertainty of a transition. • **Intellectual:** Pursue continuous learning; the new practice area offers rich intellectual challenge. • **Spiritual:** Develop a sense of meaning and purpose that the transition can serve. • **Social:** Build connection and belonging in the new practice area community. • **Physical:** Maintain activity, nutrition, sleep; minimize harmful substance use.	☐
Resilience Planning: Engage Mentee in a reflection on resilience — especially in the context of career transition. Consider: • Three Ways Lawyers Can Become More Resilient • Survival Skill No. 1 for Lawyers: Emotional Resilience	☐
Defining Professional & Personal "Success" in the New Practice Area: Work with Mentee to build a sustainable definition of success that reflects the transition. • 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 satisfaction in the work itself.	☐

Action	Mark Completed
• Finding your definition: picture yourself with all time and resources — what would you do? How would you find satisfaction in the new area? • Build 2–3 primary goals from that foundation. 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 those translate into the new practice area.	☐
Managing the Transition's Impact on Identity: Career transitions can trigger a temporary loss of professional identity and confidence. Discuss: • The "beginner's mind": how being new to a practice area is an asset, not a liability. • How prior experience translates — and how to communicate that value to new colleagues and clients. • Strategies for managing imposter syndrome during the transition period. • How to set realistic expectations for the learning curve and celebrate incremental progress.	☐

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 when transitioning firms or practice areas. • Common ethical issues arising from engaging in a new practice area and resources for resolving them. • Common grievance and malpractice "traps" and how to avoid them in an unfamiliar area. • The role of professionalism and the Colorado RPC in public interest policy development. • Technology competency obligations under RPC 1.1, Comment [8], including AI tools in the new practice area.	☐
COMPLETE AT LEAST TWO OF THE FOLLOWING	
Discuss how to screen for, recognize, and avoid conflicts of interest — including conflicts arising from prior practice area matters or clients carried into the new area.	☐

Action	Mark Completed
Work with Mentee to develop communication and leadership skills for professional working relationships in a new practice setting. 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 in the new practice area, including e-discovery obligations, proportionality, and ethical production duties.	☐
Discuss preparing for negotiation in the new practice area: when and how it is initiated, how to involve the client, ethical obligations of negotiators, and the skills needed to negotiate effectively.	☐
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 from a senior colleague to act unethically.	☐
Discuss the grievance process and a lawyer's duty to cooperate with a disciplinary investigation.	☐
Discuss client development and marketing in the new practice area: appropriate procedures, ethical implications, and how to build a practice while maintaining integrity.	☐
Have coffee with opposing counsel to practice discussing different perspectives and objectives from both sides of a matter in the new practice area.	☐
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 terminating representation under RPC 1.16A, including duties to clients from the prior practice area during and after the transition.	☐
Discuss the possibility of conflicts arising from prior practice matters in new representation — including imputed conflicts, former client conflicts, and conflicts from prior firm affiliations.	☐
Discuss the norms of the new practice area and what is — and isn't — transferable from the prior practice area: • Differing standards of civility, formality, and communication style. • Substantive competency gaps and a plan for addressing them.	☐

Action	Mark Completed
• How relationships and reputation from the prior area can and cannot be leveraged.	
Discuss AI-specific ethics in the transition context: • Which AI tools are used in the new practice area and what are their limitations? • Competency obligation to understand tools before relying on them (RPC 1.1). • Client confidentiality when using AI for research or drafting in an unfamiliar area.	☐

5. SURVIVING TRANSITION (COMPLETE AT LEAST TWO)

Action	Mark Completed
THE CARROT: What draws Mentee away from the current practice area and toward the new one? What excites their interest? Who has the job or role Mentee wants? Identify at least three motivating factors and discuss courses of action. Use the "carrots" to guide Mentee toward practice areas and roles that are better matches for their personality, values, and long-term goals.	☐
THE STICK: What is Mentee trying to move away from? The stick might be a difficult partner, the stress of trial work, demanding clients, or a toxic work environment. Identify three factors and strategies to overcome or engage these difficulties. *Caution: What if Mentee never liked the practice of law at all? If Mentee became an attorney to fulfill someone else's dream, that is a heavier stick. Discuss Mentee's "stick" to help them understand whether the transition will truly help them reach their carrot, or whether a deeper rethink is needed.*	☐
GRIT: Identify the personality traits that will sustain the transition: initiative, creativity, flexibility, endurance, and perseverance. Discuss how hard Mentee is willing to work and which traits they will invoke. Identify at least three traits to develop and discuss concrete ways to strengthen them.	☐
ECONOMIC REALITY: Help Mentee explore and rank their priorities. Career transitions require balancing economic stability with professional goals. Together, create a spreadsheet of income, expenses, and savings. Discuss short-term (0–3 months) and long-term (2–5 years) goals with a loose budget. • Discuss how compensation may shift in the new practice area and how to plan for any income gap. • Identify non-negotiable financial commitments and discretionary items that could flex during the transition. • Consider whether a phased transition — doing both areas simultaneously for a period — is viable.	☐

Action	Mark Completed
EFFECTIVE OPPORTUNITY DEVELOPMENT: Discuss how to develop opportunities through well-scripted vetting meetings with people already in the target practice area. The goal is to become known and trusted — the "insider who gets hired." • Attend three meetings or events with attorneys or stakeholders in the new practice area. • Write a list of transferable skills and how each maps to the new area. • Draft a resume and cover letter as an exercise to reflect on skills and experience. • Research the target area deeply: key players, recent developments, in-demand skills, and where your background creates value. • Engineer your luck: identify people who are well-positioned in the field and find ways to connect in person when possible.	☐
BUILDING YOUR TRANSITION TIMELINE: Map out a realistic 6–12 month transition plan: • Identify milestone markers: first matter in the new area, first referral, first speaking engagement, first recognized competency. • Build in contingency: what if the timeline slips? What resources are available? • Discuss how to communicate the transition to existing clients and referral sources professionally.	☐

6. TRANSITIONING TO AN IN-HOUSE POSITION (COMPLETE AT LEAST TWO)

Action	Mark Completed
COMMUNICATION: Argumentative writing and communication may earn praise in the legal world but can backfire in the business world. Discuss how communication in the legal world differs from communication in the business world: • Formality: legal communication tends toward precision and qualification; business communication toward brevity and decisiveness. • Limiting framing (legal) vs. possibility framing (business): "we can't do X" vs. "here's how we might accomplish the goal another way." • Written vs. verbal communication norms in corporate settings. • Adapting tone for different audiences: CEO, board, business unit leaders, operations teams. • How to translate complex legal analysis into plain-language business advice that gets acted on.	☐
RELEGATED TO RISK MANAGEMENT: At times, the business world views attorneys only through the lens of risk manager. Discuss how Mentee will overcome the potential for being pigeonholed:	☐

Action	Mark Completed
• How professional identity development can help Mentee sell themselves as more than a risk manager. • Proactively seeking cross-functional project involvement to demonstrate broader business value. • Building relationships outside the legal department with business unit leaders and operations teams. • How to present legal advice in terms of business opportunity, not just risk mitigation.	
BUILDING FINANCIAL, SALES & OPERATIONAL SKILLS: Today's general counsel bring more than legal expertise — they act as legal and business advisors to the CEO and senior leadership team. Differentiation comes from being "more than just a lawyer." Discuss with Mentee: • Mentee's current strengths and gaps in business and financial knowledge. • How to seek out opportunities to learn more about the enterprise: joining cross-functional teams, in-house task forces, or attending business unit meetings. • Key financial literacy skills for in-house counsel: reading P&Ls, understanding capital allocation, M&A basics. • How to become a fully functioning member of the senior leadership team who "just happens to be an attorney." • Resources for building business acumen: MBA essentials courses, executive education, business mentors.	☐
PASSION: What separates successful business leaders and in-house counsel from the pack is inner drive. Discuss with Mentee: • What passions Mentee has related to in-house or corporate work, and whether those align with a specific industry. • How Mentee will sustain long-term passion for the work, even during difficult professional periods. • How Mentee will know when it is time to change direction or seek different opportunities. • How passion for this type of work informs the development of Mentee's professional identity as an in-house lawyer.	☐
LEVERAGING LEGAL BACKGROUND: A law degree gives attorney-business leaders confidence to make and stick with decisions even in a litigious environment. Discuss how Mentee can leverage their legal background to take a long-term, broad-based approach to advising in-house clients: • Thinking beyond purely legal matters to consider longer-term business impact of transactions, litigation, or corporate decisions. • Seeking cross-functional challenges that allow Mentee to see the bigger picture and demonstrate business-minded thinking. • How to dispel the perception that a law degree means only an interest in legal issues.	☐

Action	Mark Completed
• Using legal training as a competitive advantage — analytical rigor, risk assessment, persuasive communication — in the business context.	
AI AND TECHNOLOGY IN THE IN-HOUSE ROLE: In-house lawyers face unique technology and AI considerations. Discuss: • How AI tools are changing contract review, legal research, and compliance work for in-house teams. • Vendor management and evaluation of legal technology tools for the legal department. • Data privacy and cybersecurity as in-house legal issues: understanding the company's obligations and advising accordingly. • How to be a technology-forward in-house lawyer who helps the business embrace innovation responsibly.	☐

7. IMPROVING RESILIENCY & EMOTIONAL INTELLIGENCE (COMPLETE AT LEAST ONE)

Action	Mark Completed
Stress, long hours, uncertainty, and the pressure to perform in an unfamiliar area are part of the transition experience. Discuss with Mentee: • How Mentee engages in self-care to support themselves during times of change and challenge. • An assessment of Mentee's level of resilience: ability to overcome professional and personal setbacks. • What specific stress triggers are most likely during the transition and what Mentee will do when they arise. • Colorado Lawyer Assistance Program (COLAP) as a confidential resource for career and wellness support.	☐
Discuss resilience and stress perception (drawing on George Bonanno's research): how you perceive stress directly influences how you respond. When lawyers believe they have resources to handle a stressor, they view it as a challenge; when they feel lacking, stress becomes a threat. Rigid responses to stress can lead to: • Increased errors and missed deadlines. • A "protect my turf" mentality. • Diminished collaboration and collegiality. • Poorer work quality and survival-based reactions (defensiveness, hypercriticality). Discuss what resources Mentee has to deal with transition stress and how to assess whether they are effectively using them.	☐
Emotional intelligence is the awareness of one's own emotions and the emotions of others. A major practice area transition involves approaching new people in	☐

Action	Mark Completed
unfamiliar situations — new bar sections, new opposing counsel, new firm or company settings. Discuss: • Personality traits Mentee embodies that both help and hurt their emotional intelligence quotient. • How Mentee can improve their "EQ" as they enter the new phase of practice. • As ABA's Law Practice magazine observed: "Studies at Harvard and elsewhere have shown that high IQ does not necessarily translate into high productivity, while the ability to 'get along with people' has been found to be more critical than intelligence, decisiveness or job expertise in achieving bottom-line results." • The Emotional Path to Success (Harvard Magazine) • Emotional Intelligence: How to Find It in Prospective Associates (FindLaw) • Lawyer Yogis Share Relaxation, Mindfulness Tips in 'Yoga for Lawyers' (FindLaw)	
Discuss how to build and sustain a support network during the transition: • Identify two or three attorneys who have made a similar transition and can serve as informal advisors. • Discuss the value of peer accountability: a colleague who checks in on progress and offers encouragement. • Explore formal and informal mentoring relationships beyond this one. • Discuss how isolation can compound transition stress and intentional strategies to counteract it.	☐

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 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. • How pro bono work in the new practice area can accelerate competency development and network-building simultaneously.	☐
Mentee attends a civic club or community service activity in which Mentor participates. Discuss the professional and personal value of community engagement during a career transition.	☐

Action	Mark Completed
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 how volunteer work in the new practice area can build skills and connections while serving the public good.	☐

9. DEVELOPING A COMPETENT PRACTICE

Action	Mark Completed
Zones of Competency Analysis: Evaluate how Mentee assesses their legal competencies in the new practice area. 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. • Discuss which competencies from the prior practice area transfer directly, which transfer partially, and which must be built from scratch.	☐
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 specific to the new practice area.	☐
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 in the new area.	☐
Discuss bar association involvement as a means of developing referral relationships and competency networks — local, state, and national, including any specific to the new practice area.	☐
Technology Competency in the New Practice Area (see Colorado RPC 1.1, Comment [8]): • What AI-assisted research or drafting tools are standard in the new practice area? • How to critically evaluate and verify AI-generated output before relying on it. • Staying current: CLE resources, practice-area-specific technology publications, and bar tech committees.	☐
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.	☐
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 — including in the new practice area?	☐
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 in the new practice area?	☐
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 new practice area. • Discuss how the new practice path might support or influence Mentee's professional identity and goals.	☐
Discuss DEI as a transition-specific consideration: • How DEI dynamics may differ in the new practice area vs. the prior one. • How underrepresented attorneys can strategically use career transitions to move into more equitable practice environments. • Affinity bar organizations relevant to the new practice area as community and network resources.	☐

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 — especially as that identity evolves through a practice area transition: • What are your values and how do they fit with your choice to become an attorney? How is this expressed in your practice — and how will the new practice area either honor or challenge those values? • 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? How might the transition affect those relationships? • What would your ideal integration of personal and professional life look like in the new practice context? • How does your history shape why you became a lawyer and why you are now making this transition? • 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 — and is this transition part of that evolution? • Do an activity related to the Mentee's personal interests to build the mentoring relationship outside a formal legal context.	☐

Action	Mark Completed
Discuss whole-person practice as a through-line across practice areas: • How core values, strengths, and passions follow an attorney across every area of practice. • How the transition is an opportunity to shed what no longer fits and amplify what does. • How prior experience — even from a very different practice area — shapes a richer, more multidimensional lawyer.	☐
Discuss the unique whole-person challenges of a practice area transition: • The grief and identity loss that can accompany leaving a practice area where you were recognized as an expert. • The beginner's discomfort and how to reframe it as intellectual growth. • Strategies for maintaining confidence and a stable sense of professional identity during the learning curve. • COLAP and peer support resources available to Colorado attorneys navigating significant career changes.	☐

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).