

Mentoring Plan for Lawyers New to Practice

Revised May 2026



How to Use This Plan

This curriculum guides mentor-mentee pairs through eleven core topic areas over the mentoring term. Check the box ☐ 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 from the original plan — click any underlined text to open it.

1. INITIAL PLANNING MEETING, PERSONAL AND PROFESSIONAL DEVELOPMENT

Action	Mark Completed
Schedule an initial meeting — in person where practical, or virtually — to prepare a customized mentoring plan based on the Mentee’s needs and interests. Use the CAMP Initial Goal Plan & Meeting Guide to develop goals for the mentoring relationship. At this first meeting, consider covering the following: • Preferred communication methods for each participant. • Schedule all remaining meetings and activities for the mentoring term. • Long-term professional and career goals, and strategies to achieve them. • A day-in-the-life discussion, including work-life integration, mental health, substance use issues facing lawyers, and resources available to attorneys. • Introduction of Mentee to office attorneys and staff, if not already done.	☐
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 technology and communication norms for the mentoring relationship: • Preferred platforms (email, text, video call, in-person). • Response-time expectations and boundaries around after-hours contact. • How to handle cancellations and rescheduling. • Confidentiality expectations within the mentoring relationship.	☐

2. THE COLORADO BAR AND LEGAL COMMUNITY

Action	Mark Completed
COMPLETE AT LEAST ONE OF THE FOLLOWING	
Attend a bar association meeting or attorney networking event together (in person or virtually). Introduce Mentee to other attorneys. Discuss the advantages of bar involvement and the variety of local, state, and national associations available, including practice-area-specific groups. Suggested associations to explore: • Colorado Bar Association (CBA) and relevant sections. • Denver Bar Association and local/county bar associations. • National specialty bars (e.g., ABA, DRI, ACLU, NAECLA). • Affinity and diversity bar organizations.	☐
Visit the local courthouse(s) — particularly where Mentee may appear. Make introductions to members of the judiciary, court personnel, and clerks of court. Discuss customary civility and etiquette in court and among lawyers and judges in the community.	☐
Attend a Term Day or similar gathering of local judges and attorneys. Discuss how these events foster community in the bar and how Mentee can get involved.	☐
Discuss the value of online legal communities and professional networking: • LinkedIn presence and profile best practices for new attorneys. • State bar listservs and online practice-area forums. • Thoughtful use of social media in a professional context.	☐

3. DEVELOPING PROFESSIONAL IDENTITY & LAWYER WELL-BEING

Action	Mark Completed
COMPLETE AT LEAST TWO OF THE FOLLOWING	
Professional Identity Formation: Help Mentee articulate their “Professional Identity” as a 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 Mentee to succeed? • Who in Mentee’s personal and professional community will support them?	☐

Action	Mark Completed
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: Identify and manage emotions; seek help 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 a sense of connection, belonging, and community. • Physical: Maintain activity, nutrition, sleep, and 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 an improvement plan. Consider: • Three Ways Lawyers Can Become More Resilient • Survival Skill No. 1 for Lawyers: Emotional Resilience	☐
Defining Professional & Personal “Success”: Work with Mentee to build a sustainable, fulfilling definition of success. • 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: History is full of respected individuals who followed purpose-driven, non-traditional routes. • Finding your definition: Picture yourself with all time and money. What would you do? How would you find satisfaction? • A foundation for goals: Once success is defined, build 2–3 primary goals from that foundation. Your definition of success dictates your definition of failure — you’ve only failed if you’ve given up.	☐
Assessment of Current Professional Identity: Ask Mentee to answer the question “What do you do?” Work together to expand that answer to include a broader view of Mentee’s strengths, interests, and professional passions.	☐
AI & Technology Awareness for Lawyer Well-Being: Discuss how AI tools and legal technology are changing the practice of law and what that means for Mentee’s identity and well-being: • Opportunities to reduce administrative burden and free time for higher-value work. • Risks of over-reliance, competency gaps, and the importance of staying current. • Strategies for maintaining human connection and judgment in an AI-assisted practice.	☐

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 and resources for resolving difficult questions. • Common grievance and malpractice “traps” and how to avoid them. • The benefits of carrying malpractice insurance and the consequences of failing to do so. • Competency obligations in the age of AI — including RPC 1.1 and the duty to understand relevant technology.	☐
Dealing with Toxicity & Bullying: Engage Mentee in a reflection on bullying and toxic behavior in the legal profession. Develop a personal plan for avoiding and responding to such conduct. See: Dealing with Lawyer Bullies	☐
COMPLETE AT LEAST TWO OF THE FOLLOWING	
Discuss how to screen for, recognize, and avoid conflicts of interest — including lateral hires, government employment, and imputed disqualification issues.	☐
Work with Mentee to develop communication and leadership skills for professional working relationships. 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 how to prepare for negotiation: when and how it is initiated, how to involve the client, ethical obligations of negotiators, skills needed, and how to develop them.	☐
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 a request from a senior colleague to do something unethical.	☐
Discuss the grievance process and a lawyer’s duty to cooperate with a disciplinary investigation. Review the Colorado Supreme Court Office of Attorney Regulation Counsel resources.	☐
Discuss client development and marketing, appropriate procedures, and ethical implications, including the rules governing attorney advertising in Colorado.	☐

Action	Mark Completed
Have coffee with opposing counsel to practice discussing different objectives and perspectives from both sides of a matter.	☐
Discuss the benefits of the Colorado Bar Association Ethics Hotline. <i>Certain members of the CBA Ethics Committee are available for brief discussion of attorneys' own 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.</i>	☐
Discuss ethics and confidentiality issues specific to the use of AI tools in legal practice, including client data privacy, supervision obligations, and verification of AI-generated legal research and documents.	☐

5. LITIGATION AND TRANSACTION EXPERIENCES

Action	Mark Completed
COMPLETE AT LEAST TWO OF THE FOLLOWING	
Discuss types of alternative dispute resolution (ADR): mediation, arbitration, early neutral evaluation, summary jury trials, collaborative law practice. Discuss when each is most appropriate and the role of the attorney in each process.	☐
Mentee attends one of the ADR proceedings listed above. The pair discusses and evaluates what was observed, including strategy, communication style, and outcome.	☐
Mentee attends or participates in a deposition. The pair discusses preparation, questioning strategy, objection practice, and evaluation of what was observed.	☐
Mentee attends or participates in part or all of a trial — civil or criminal, bench or jury, state or federal. The pair discusses and evaluates courtroom demeanor, evidence, and advocacy.	☐
Mentee attends or participates in an appellate oral argument before the Colorado Supreme Court, Colorado Court of Appeals, or Tenth Circuit. The pair discusses and evaluates what was observed.	☐
Mentee attends or participates in a hearing before a state or local administrative body (e.g., zoning board, tax equalization board, licensing or regulatory body). The pair discusses and evaluates what was observed.	☐
Mentee observes a real estate closing or other business or financial transaction closing. The pair discusses deal structure, documentation, and lessons observed.	☐
Mentee attends an estate planning document execution meeting. The pair discusses client preparation, document review, and execution formalities.	☐

Action	Mark Completed
Mentee attends or participates in a planning or strategy meeting regarding a business transaction or estate planning matter. The pair discusses and evaluates what was observed.	☐
Mentee attends or participates in a proceeding specific to the Mentor's or Mentee's practice area. The pair discusses and evaluates what was observed.	☐
Review JDFs applicable to Mentee's practice area. Discuss drafting motions, briefs, and client letters, and how to conduct efficient legal research using both traditional and AI-assisted tools.	☐
Discuss emerging areas of practice and exposure opportunities: • Remote and virtual court proceedings: best practices and technology expectations. • E-filing systems and electronic document management. • Cross-border and multijurisdictional matters: when to seek pro hac vice admission or refer out.	☐

6. LAW OFFICE MANAGEMENT AND IN-OFFICE PROCEDURES

Action	Mark Completed
REQUIRED (complete with at least one activity from the list below)	
Law Office Management Best Practices (Required): Discuss the following, preferably including a tour of Mentor's office: • 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 and secure destruction. • Calendar reminder and docketing systems; avoiding missed deadlines. • Information technology systems and cybersecurity basics. • Library and legal research systems (including AI-assisted research tools). • Other resources: publications, seminars, and continuing legal education.	☐
COMPLETE AT LEAST TWO OF THE FOLLOWING	
Discuss the role and responsibilities of paralegals, assistants, and other office personnel. Address how to establish productive working relationships across hierarchies and the "care and feeding" of support staff.	☐

Action	Mark Completed
Discuss practices to maintain client confidentiality, including digital security, use of cloud-based tools, and managing confidentiality in remote-work environments.	☐
Discuss good time management skills and techniques. Discuss strategies for managing competing deadlines, avoiding burnout, and protecting time for professional development.	☐
Discuss how to screen for, recognize, and avoid conflicts of interest — including use of conflict-check software and related procedures.	☐
Discuss how to prevent unauthorized practice of law issues with staff, including supervision obligations and the limits of paralegal authority.	☐
Discuss office politics: appropriate networking, socializing, and personal behaviors that reflect professional values and support a positive workplace culture.	☐
Discuss planning ahead for handling the practice in the event of retirement, disability, or death, including succession planning resources from the Colorado Bar.	☐
Discuss leaving a firm: how to protect oneself, properly advise clients of their rights, withdraw from cases, and avoid ethical pitfalls during transitions.	☐
Discuss evaluation and compensation procedures, and the paths to professional advancement within a firm, government agency, or in-house setting.	☐
Discuss what should go into a fee agreement. See RPC 1.5 and RPC 1.16A on client file retention.	☐
Discuss strategies for organizing the workday, including task prioritization, delegation, and effective use of technology tools.	☐
Cybersecurity & Data Privacy: Discuss the following in the context of law office management: • Password hygiene, multi-factor authentication, and secure remote access. • Risks of phishing, ransomware, and wire fraud targeting law firms. • Attorney ethical obligations related to data security under Colorado RPC 1.6 and associated comments. • What to do if a data breach occurs: notification obligations and response planning.	☐

7. PROFESSIONALISM IN WORKING WITH CLIENTS

Action	Mark Completed
COMPLETE AT LEAST THREE OF THE FOLLOWING	
Review the Colorado Principles of Professionalism together. Select at least three principles for deeper discussion and explore how they apply to Mentee's practice.	☐
Discuss the initial meeting with a potential client: gathering information, appraising credibility, evaluating whether to accept the representation, how to decline representation 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 address uncomfortable 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, using tools for 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 ongoing communication with clients: updates in the law, relevant articles, check-ins while the matter is live, and strategies for retaining long-term client relationships.	☐
Discuss how clients are the best marketing for a law firm. Discuss strategies for requesting referrals, collecting testimonials (within ethical constraints), 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.	☐

Action	Mark Completed
Discuss client communication in the digital age: • Client portals and secure messaging platforms. • Managing client expectations about AI-assisted work product. • Accessibility and language access considerations.	☐

8. DEVELOPING A COMPETENT PRACTICE

Action	Mark Completed
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 for Mentee to regularly revisit and update this “Zones of Competency” analysis.	☐
Identify areas where Mentee does not yet feel competent but wishes to grow. Generate a long-term plan for obtaining the needed competencies, including CLEs, mentorship, co-counseling, and supervised practice.	☐
Develop a short-term “Competency Plan” for situations where Mentee is approached to handle a matter outside their current competency. Include educational resources, experienced mentors, co-counsel options, and referral networks.	☐
Discuss the advantages of bar association involvement as a means of developing referral relationships and competency networks — local, state, and national associations, including practice-area-specific organizations.	☐
Technology Competency (see also Colorado RPC 1.1 Comment [8]): Discuss Mentee’s obligation to stay current with relevant legal technology and AI tools: • What AI-assisted research or drafting tools are available in Mentee’s practice setting? • How to critically evaluate and verify AI-generated output. • Staying current: CLE resources, bar tech committees, and legal technology publications.	☐
Discuss the role of continuing legal education in competency development: • Colorado’s CLE requirements and tracking compliance. • Strategies for selecting CLEs aligned with Mentee’s practice goals. • Emerging and specialized certifications relevant to Mentee’s area.	☐
Add Other:	☐
Add Other:	☐

9. PUBLIC SERVICE

Action	Mark Completed
COMPLETE AT LEAST ONE OF THE FOLLOWING	
Acquaint Mentee with legal aid programs, local pro bono programs, volunteer boards, and other opportunities for civic and charitable legal service. Discuss the professional and personal rewards of pro bono work, and address any perceived impediments to taking it on.	☐
Mentee attends a civic club meeting or community service activity in which Mentor participates. Discuss the reasons for making time for pro bono service and how it fits into a sustainable legal career.	☐
The pair participates in a bar-sponsored or other volunteer program delivering legal services to the public (e.g., a legal clinic, expungement fair, or tenant's rights workshop). Discuss the takeaways.	☐
Discuss pro bono as a professional obligation and a career asset: • Colorado's aspirational standard of 50 hours per year under CBA voluntary pro bono guidelines. • Law firm and employer pro bono programs and how to access them. • Building skills and relationships through volunteer legal work. • Resources: Colorado Legal Services, Metro Volunteer Lawyers, and other CAMP-affiliated programs.	☐

10. DIVERSITY, EQUITY, INCLUSION, AND ACCESSIBILITY

Action	Mark Completed
COMPLETE AT LEAST TWO OF THE FOLLOWING	
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 both 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 to address these challenges? What resources were helpful? What resources were missing, and how might they be developed?	☐

Action	Mark Completed
Engage in a cultural empathy self-assessment using the Cultural Competence Self-Assessment Checklist . Discuss how cultural empathy supports both 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 (Big Law, small firm, government, corporate, legal aid, nontraditional) in relation to Mentee's personal and professional identities and goals: - Examine resources for underrepresented attorneys in organizations appropriate to Mentee's career path. - Discuss how different paths might support or influence Mentee's professional identity and goals.	☐
Discuss accessibility and language access as professional values: - How to make legal services accessible to clients with disabilities. - Working with interpreters and translators effectively and ethically. - Universal design principles in legal document drafting and communications.	☐

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 Mentor to shape an approach that expresses the whole person as a lawyer. The discussion should explore how Mentee's unique interests, history, and talents influence their perspective — and how that perspective shapes their practice. Use the prompts below as starting points: • What are your values, and how do they fit with your choice to become an attorney? How are they expressed in your practice today? • Do you have a spiritual context — a religion, relationship with nature, or guiding philosophy? How does it shape why and how you practice law? • 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? How would doing so affect your practice? • 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 do you prefer them separate? Or some combination? • 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 during your practice? • Do an activity related to the Mentee's personal interests to build the mentoring relationship outside of a formal legal context.	☐
Discuss the concept of "caregiving and law" — how responsibilities as a parent, partner, or caregiver intersect with the demands of legal practice, and strategies for sustainability: • Boundary-setting strategies that protect personal priorities. • Flexible work models and how to negotiate for them. • Building a support network inside and outside the firm.	☐
Financial Well-Being as Whole-Person Lawyering: Discuss financial health as a dimension of overall well-being: • Student loan repayment strategies (income-driven repayment, PSLF eligibility). • Budgeting on a starting attorney salary.	☐

Action	Mark Completed
Long-term financial planning: retirement accounts, disability insurance, and emergency funds.	

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 or program support, contact the Colorado Attorney Mentoring Program (CAMP).