

ASSOCIATE INDIVIDUAL DEVELOPMENT PLAN Instructions

Developing an Individual Development Plan (IDP) will assist you as you think strategically about your career and help you identify concrete steps that you can take to reach your goals.

Instructions on Creating Your IDP:

1. Identify two or three professional development goals over the next 12 months in a relevant area: substantive practice area skills; leadership; management; client relations / business development. For example:
 - a. Stay abreast of current issues affecting your practice area and clients (e.g., monitor publications in your specialty area; attend courses, conferences, speaker events);
 - b. Increase knowledge about a relevant client's business; consider joining any industry organizations related to your client's business;
 - c. Develop strategic alliances with key partners for feedback and coaching;
 - d. Enhance personal involvement in firm activities and distinguish yourself (e.g., give speeches, write articles, establish yourself as an expert in your field, take on leadership roles, maintain network with colleagues outside of the firm).

2. Identify areas of expertise that you would like to develop, including a niche area in which you would like to specialize. For example:
 - a. Have you noticed a particular area of law that is relevant to the firm's clients or important to the firm, and that few (or no) other lawyers at the firm have developed a niche in that area? Is there a small or mid-size client of the firm operating in this space without in-house counsel that you can serve holistically (*i.e.*, in a quasi-in house counsel role)?
 - b. Have you identified a new and developing area of law, relevant to your clients and their industries?
 - c. Have you communicated your interest to relevant parties at your firm?

3. Identify your current areas of need and development. For example:
 - a. Are you getting the type of work experiences you need at this stage of your career?
 - b. Is there a particular type of transaction or matter that you have not done?
 - c. Is there an aspect of a transaction or matter that you have not done?
 - d. What types of work experiences interest you? More client contact, depositions, negotiating opportunities, court appearances? Entity formation, general corporate representation, issuer representation,

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- stock purchase agreements, mergers, asset sales, credit agreements, debt restructuring?
- e. Have you communicated with those who can assist you in gaining the experiences you seek?
4. Identify those non-practice related matters that can significantly impact your overall professional advancement and development. For example:
 - a. Familiarize yourself with the internal politics of your firm at pertinent levels (*i.e.*, practice group, office (in multi-office situations), and management).
 - b. Do you know the requirements (including those “unwritten”) to become a partner or other equity member at your firm or to advance in position?
 - c. Know and understand your firm's processes for analyzing hours billed, making any adjustments, and collecting fees on those hours, and discuss whether any of your hours billed are subject to any particular fee arrangements. Consider your annual hours billed, taking into consideration the amounts billed and collected on those hours, and understand the extent to which all such circumstances related to hours impact your performance assessment and opportunity for advancement.
 - d. Are there civic and community organizations and events that are supported by your firm in which you are expected to become involved or take a leadership role?
 - e. Is it important to make yourself known to other attorneys or influential persons in the firm outside your practice group or office with whom you do not interact on a regular basis?
 5. Identify your personal responsibilities and priorities and consider how you will maintain work/life effectiveness.
 - a. Identify what and who personally matters to your quality of life and should be prioritized. Fitness, creative endeavors, other hobbies? Time with family and close friends?
 - b. Treat personal priorities like professional ones: calendar personal commitments and protect the time, and prudently notify supervisors when conflicts arise to determine if there’s any flexibility to resolve them.
 - c. Assess your time management skills and effectiveness, and seek coaching resources to improve them if needed.
 6. Make sure that your goals are specific, realistic, and measurable. Establish measures such as:
 - a. Understand and be well-versed and knowledgeable regarding issues facing clients and their industries;
 - b. Engage in more meaningful client interaction through regular follow up;

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- c. Identify professional and community organizations with which you would like to be more involved and set aside the time to participate;
 - d. Develop deeper relationships within professional network;
 - e. Be known among partners and clients for expertise and ability to deliver legal advice reflecting an understanding of the client's business.
7. Create an action plan to achieve each of your goals, such as:
- a. Read a relevant legal periodical and/or the *Wall Street Journal* daily;
 - b. Publish one article and two client alerts in the next 12 months;
 - c. Reach out to appropriate client contacts once a month;
 - d. Take a leadership role in a particular external organization;
 - e. Regularly seek feedback and provide candid feedback on projects from supervisors, peers and subordinates.
8. Consider what resources and support are available to you. For example:
- a. Seek out partners with the expertise you want to develop;
 - b. Consider firm administrative resources: practice group managers, professional development, diversity and other talent management staff; marketing department; library resources.
9. Establish timelines for accomplishing your goals.

After you have created your plan, schedule an initial meeting with your mentor, who might assist you as you create and execute your IDP as follows:

1. Help you set priorities.
2. Serve as a reality check.
3. Strategize with you regarding: approaches, potential obstacles, opportunities, etc.
4. Advise you concerning client relations, opportunities, and building a practice.

Decide what you hope to gain from your mentor: guidance regarding skills needed to meet professional and personal goals; networking opportunities; trends in practice area; identifying most challenging work and leadership opportunities, etc.

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INDIVIDUAL DEVELOPMENT PLAN Template

GOALS:

Identify two or three goals for the next 12 months.

- 1.
- 2.
- 3.

ACTION STEPS:

Identify specific action steps that you will take to accomplish your goals.

- 1.
- 2.
- 3.

SUPPORT:

Identify resources available to you as you execute your IDP.

- 1.
- 2.
- 3.

MEASURES:

Describe how you will measure your progress.

- 1.
- 2.
- 3.