



# CARLTON FIELDS UNIVERSITY

PROFESSIONAL DEVELOPMENT AT CARLTON FIELDS

**“An Investment in Your Future”**

**CARLTON FIELDS**  
ATTORNEYS AT LAW

“We make every effort to integrate, mentor, and train our attorneys. We invest in the development of our attorneys through innovative and collaborative training to provide exceptional service and value to our clients.”



## Four Pillars of Professional Development

**INTEGRATION:** Integration Liaisons in each of our offices help new lawyers settle into the firm. These experienced attorneys help our newest colleagues meet others throughout the firm and learn what they need to know about our various practice groups, offices, resources, policies, and procedures.

**MENTORING:** We also assign a Shareholder Mentor to each new associate. The mentor will work with the attorney throughout the associate years. Together with the practice group leader, the mentor will help the associate develop a plan for professional development and, equally important, will help carry it out.

**FEEDBACK:** The firm offers its associates individualized practical career guidance through the firm's comprehensive annual Associate Review Process, which involves feedback from almost every shareholder and senior lawyer in the firm. During the associate review meeting, the practice group leader and the firm's Professional Development Director meet the associate, discuss their review, and make career development recommendations.

**TRAINING:** Carlton Fields offers a broad and balanced curriculum of both structured and informal programs to enhance the development of our lawyers. The firm is continually reviewing and evolving programming to meet its commitment to be on the leading edge of associate training.

## PROFESSIONAL DEVELOPMENT PARTNERING

The Recruiting and Marketing departments participate in the firms' holistic approach to professional development, ensuring it remains a centerpiece of the core cultural and client development at Carlton Fields.

The Recruiting Department organizes the firm-wide summer associate program with highlights that include the two-day orientation in Tampa, on-the-job substantive and skills related training and seminars, the summer associate mentor program, the "reader" program, networking events, and more. The Marketing and Client Development Department develops and implements programs which include client and industry leader presentations ("CF Forums"), the "Next Level" shareholder-coaching program, training on developing strategies and tactics to provide superior value to our clients, and more.

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## CAREER DEVELOPMENT TRAINING

We teach necessary skills in all of these programs, focusing on the fundamentals of professional growth at each stage of an attorney's career, helping every attorney to achieve their full potential as professionals and to succeed in the modern practice of law.

### SUMMER ASSOCIATE ORIENTATION

The firm brings all the summer associates to Tampa for an intensive two-day orientation program before they begin work in their respective offices. Programming includes Keys to Success presented by the firm's CEO, Law Firm Economics presented by the firm's COO, a writing workshop, a client focus program, Conflicts & Client Confidentiality session, and timekeeping & billing training.

### SUMMER ASSOCIATE TRAINING

Summer associates develop and refine their skills through on-the-job experience supplemented by formal programs. As part of this training process, firm leadership conducts various presentations and workshops throughout the summer including:

- An Introduction to the Summer Associate Writing Program
- Pro Bono Workshop
- Backpacks to Briefcases Panel
- Client Site Tours and Courthouse Tours
- Client Matter Observation Opportunities

### ORIENTATION FOR NEW ASSOCIATES

Firm directors, staff, and local administrators facilitate this comprehensive two-day orientation program, giving associates an overview of Carlton Fields at the outset of their career with the firm. Program segments include client development, professional development, pro bono work, marketing, time keeping, finance, and more.



## CAREER DEVELOPMENT TRAINING

### **NEW ASSOCIATE CAREER DEVELOPMENT PROGRAM**

This program, offered in the first quarter of an associate's entry into the firm, compliments the earlier orientation. Firm leadership and shareholder faculty introduce the attorney to law firm life, culture, and expectations. Sessions include keys to success as a junior associate at Carlton Fields, the associate review process, client service, firm financials overview, loss prevention, and an interactive mid-level associates' panel on how to succeed in your career.

### **MID-LEVEL ASSOCIATE CAREER DEVELOPMENT PROGRAM**

Firm leadership and shareholders present this full-day seminar, designed to assist mid-level associates as they assume growing responsibilities in the firm, including client cultivation and development. Presentations include best practices in client interactions and relations (taught by a firm client), the shareholder selection process, shareholder compensation, firm finances, and more.

### **NEWER SHAREHOLDER CAREER DEVELOPMENT PROGRAM**

New shareholders learn their changing role and responsibilities at Carlton Fields. Segments include transitioning from associate to shareholder, taking your practice to the next level, firm economics, delegation, and more.

### **MID-LEVEL SHAREHOLDER CAREER DEVELOPMENT PROGRAM**

Firm faculty assist shareholders in transitioning to their expanded role in leadership at the firm. This 'best practices' perspective includes marketing segments targeting client pitches and client management, plus business segments targeting matter/bill collections and management practices.



“My mentor makes me feel like I am an indispensable part of the team and that I have a promising future at this firm and in the practice of law.”  
- CF Mentor award nomination quote



## MENTORING PROGRAM

### ASSOCIATE MENTORING PROGRAM

- Carlton Fields established a formal Mentoring Program in 1997. The goal of the program is to enhance the overall professional development of attorneys. Mentors provide ongoing substantive, professional, and practice management teaching - playing a key role in the integration of new attorneys into the law firm.
- The firm teams up a Shareholder Mentor for each associate, usually from their practice group, and the pair meets formally several times a year and more frequently on an informal basis. Mentors are heavily involved in the associate review process and discuss the annual associate review document with their mentee.
- Mentors at Carlton Fields serve as teachers and: (1) acclimate the associate into the firm’s culture; (2) lead by example; (3) guide the associate professionally; (4) assist the associate with identifying opportunities (and teach the associate to recognize and pursue opportunities independently); (5) help the associate succeed; and (6) provide constructive criticism and candid advice when necessary.
- Shareholder Mentor Liaisons in each office help implement the mentor program. The liaison meets periodically with associates and introduces mentor-related programming to associates and mentor shareholders. The liaison is also available to assist in changing mentoring pairs when needed.



## OTHER MENTORING PROGRAMS

### **INFORMAL MENTORING VIA AFFINITY GROUPS**

Senior lawyers in each affinity group (the Women's Initiative Network, the Minority Lawyer Network, and the Gay and Lesbian Equality Network) serve as a resource and mentor for the junior members. They encourage associates to ask questions, raise issues, and discuss best practices.

### **NEW SHAREHOLDER MENTORING PROGRAM**

Firm leadership pairs up new shareholders with current Carlton Fields shareholders. The experienced shareholders make introductions to clients, targeted partners, and other strategically defined internal and external opportunities to help the new shareholders quickly ramp up their business development activities.

### **SUMMER ASSOCIATE MENTOR**

The firm matches each summer associate with a Shareholder Mentor and an Associate Mentor. The Shareholder Mentor meets with the summer associate regularly to provide performance feedback and to advise the summer associate about work assignments and practice groups. The Associate Mentor helps integrate the summer associate into the firm and the community, both personally and professionally. In addition, assigned "readers" give constructive feedback and instruction to the associates on all written projects.

"None of the friends I have spoken with at other firms are experiencing anything approaching the level of commitment and dedication to the mentoring process." – CF Mentor award nomination quote



## FEEDBACK, COACHING, AND NETWORKING

Carlton Fields believes that teamwork is vital to the firm's success and supports its development with feedback, coaching, and networking at all levels.

### ASSOCIATE REVIEW PROCESS (FORMAL)

Firm leadership gives the associates individualized career guidance through the firm's annual Associate Review Process.

- Practice group leaders, shareholders, and the Director of Professional Development work together for several months to fully review each associate's performance and provide written feedback for the review summary memo.
- The practice group leader and the Director of Professional Development meet with each associate to review the written summary and to discuss the associate's strengths, areas to improve, and recommendations for continued career development.

### ASSOCIATE FEEDBACK (INFORMAL)

Supervising attorneys, mentors, and colleagues give associates significant day-to-day guidance and feedback in their practice. The associates enjoy the benefits of this professional development throughout their careers.

### EXPERIENCE TRACKS

Many of the practice groups have developed experience tracks, a written pathway of development for associates, which detail mile markers at various intervals in an associate's development. These guides trace substantive training, self-development tasks, practice actions, knowledge touchstones, mentoring moments, and more.

### DIRECTOR OF PROFESSIONAL DEVELOPMENT

The firm's Director of Professional Development, a former practicing attorney and Assistant Dean of Career Services, provides individual associate counseling and coaching sessions.



## FEEDBACK, COACHING, AND NETWORKING

**Shareholder/Of Counsel Feedback Process.** Shareholders and Of Counsel attorneys complete a self-evaluation and business development plan annually. The firm's CEO meets with each new shareholder and Of Counsel attorney to discuss issues, growth, and other highlights in the evaluation or plan. Established shareholders and Of Counsel may also request a meeting with the CEO to discuss year-end professional development topics.

### **ONE-ON-ONE "NEXT LEVEL" SHAREHOLDER COACHING PROGRAM**

Selected shareholders pair with outside coaches or the firm's Chief Marketing Officer for one-on-one sessions to develop and effectively implement their customized business development plan. The program has included several group training sessions.

### **PRACTICE GROUP LEADER GUIDANCE**

Practice group leaders have an active role in the professional development of their groups' attorneys. They help steer individual career development plans and strategic placement within bar, professional, and civic organizations.

- Practice group leaders annually self-evaluate on the following criteria: strategic leadership, growing talent, monitoring and maintaining productivity, diversity, and teamwork.
- Members of the practice group also anonymously evaluate their practice group leaders in these same areas.

## FEEDBACK, COACHING, AND NETWORKING

**MINORITY LAWYER NETWORK:** The MLN promotes socialization and the exchange of feedback among the minority lawyers at the firm. The MLN professionally develops minority lawyers through mentoring and educational seminars, and identifies outside organizations that offer career development and networking opportunities.

### RECENT MLN-SPONSORED EVENTS:

- “Capitalizing on Diversity and Relationships to Build Marketing Success” – Consultant-run workshop focused on assisting minority lawyers with business development and growing their practices.
- “The Next Level – Arriving and Thriving” – A best practices discussion at the firm’s Diversity Retreat. A panel of young minority shareholders from other major firms spoke candidly about how they made it to the level of partner or shareholder and what they are doing to continue succeeding.

**COMMUNITY MINORITY MENTORING PROGRAM:** The Diversity Committee matches minority associate attorneys with successful business professionals and community leaders. Community mentors provide their mentees with enhanced visibility and valuable advice on the development of leadership skills. They assist the associates with “plugging in” and involving themselves in the community, while building their network - the foundation of quality business development.



## FEEDBACK, COACHING, AND NETWORKING

**WOMEN'S INITIATIVE NETWORK:** WIN provides a forum for communication among women attorneys and promotes the career advancement of female attorneys through educational and networking events.

### RECENT AND ONGOING WIN-SPONSORED EVENTS:

- Successful female shareholders discuss their career strategies at the "How I Did It – Professional Development and Empowerment Series."
- During the 2008 Retreat, women in-house counsel spoke in a roundtable about client service, worklife balance, and career advancement issues.
- "Writing Effective Self-Evaluations" – Firmwide CLE with a special focus for women associates.
- "A Celebration of Women" – Carlton Fields' female attorneys presented to businesswomen in South Florida as part of a niche marketing initiative.

**GAY AND LESBIAN EQUALITY NETWORK:** GLEN aims to ensure that Carlton Fields is a welcoming and nurturing environment for its gay and lesbian employees. GLEN hosts events for those within the firm who seek to advance gay and lesbian equality, providing networking opportunities and a support structure for the firm's gay and lesbian employees.



## INTEGRATION PROGRAM

Carlton Fields work culture is renowned for its collegiality and friendliness. Through integration the firm quickly brings attorneys into an enjoyable supportive atmosphere.

### CF INTEGRATION

Integration Liaisons, firm administration, staff, and colleagues introduce new attorneys into the firm's culture, conscience, and community.

### TAKE A NEW HIRE TO LUNCH

Firm attorneys take the new attorney out for meals, happy hours, and events - periodically checking in with the new lawyer. The Integration Liaison in each office oversees the process.

### SPECIAL FOCUS

Carlton Fields has an Integration subcommittee. Shareholders, associates, and Of Counsel serve on the subcommittee, and meet throughout the year to confirm that integration is operating successfully and make suggestions to improve.

### THERE IS "I" IN TEAM

The "I" stands for Integration, and the entire Carlton Fields team pitches in to make attorneys feel welcome and assimilate into their practice, office, firm, and community. With initial Recruiting contact, other departments - Professional Development, Human Resources, Information Services, Finance, etc. and attorney groups (Practice Groups, Committees, Networks, etc.) work hard to make the transition seamless.

## 2008 - 2009 (TO DATE) COURSE OFFERINGS

- Choice of Entity and The Electronic Recording Act
- Appellate Procedural & Ethical Issues
- Fiduciary Law – Good Process, Bad Process, or No Process?
- Commercial Real Estate Industry – Pain After the Passion
- An Insider's View of Effective Mediation
- The Best Kept Litigation Secret in Town- Bankruptcy Court
- Anti-Counterfeiting: Trademarks, Remedies, and Penalties
- Federal Sentencing Guidelines
- The Science and Policy of Climate Change
- Appellate Process from Post Trial Motions to Final Disposition
- It's All About the Appeal: Roundtable Discussion
- Advice of Counsel – Defense to Insurance Bad Faith Litigation
- Mergers and Acquisitions 2008 Market Overview & Outlook
- Analysis of Budget Requirements for Condos and Timeshares
- Recent Developments in Delaware Corporate Law
- Grandparent/Caregiver Project Training
- The 2008 Supreme Court Term
- Delivering Real Value for Clients: Florida's Business Incentives
- Best Practices and Strategies for Written Discovery
- Deposing an Expert Witness: Strategy and Preparation
- Data Security & Privacy: What Your Clients Need to Know

## PRACTICE AREA SUBSTANTIVE LAW TRAINING

This training establishes and hones the raw tools and understanding of practice areas and niches that help attorneys create their unique abilities and skills.

### FIRMWIDE IN-HOUSE SUBSTANTIVE LAW PROGRAMS

Program attendees gather in each of our offices to participate in these sessions live or via our videoconference system. Through presentation, discussion, and engagement our attorneys learn the latest developments in their areas of practice and enhance skills they need to serve our clients capably and efficiently and to develop their own careers.

### EXTERNAL SUBSTANTIVE LAW PROGRAMS

Attorneys can attend national and local CLE seminars - examples include NITA's trial skills workshops, ABA section-specific hot-topic seminars, and local bar luncheons. Practice group leaders facilitate attendance and budgets for these events with an eye for upgrading the groups' overall knowledge and the ancillary networking, business development opportunities that occur.

### OTHER DEVELOPMENT OFFERED THROUGH PRACTICE GROUPS

- Practice Group Meetings. Practice group members meet regularly and the sessions are an important educational tool, which often include formal presentations and discussions on legal issues, topics affecting the practice area.
- Practice Group Retreat. Practice group leaders periodically hold retreats to facilitate in-depth group strategic planning and team bonding.
- Biennial Retreats. Every other year, firm attorneys attend an offsite retreat that includes marketing and business development programming by outside presenters.

### PROGRAMS ON AUDIO/VIDEO DISKS

The Professional Development Department provides general and practice-group-specific audio and video CDs to meet training and MCLE compliance needs.



## PRACTICE SKILLS DEVELOPMENT

Practice skills are important to all attorneys' development and help separate great attorneys from good attorneys. The firm gives everyone the tools to become great attorneys.

### DEPOSITION TRAINING PROGRAM

Intensive three-day program. Participants engage in a series of simulated deposition situations followed by a constructive critique. The faculty strives to enhance the participants' level of experience, comfort, and skill in taking and defending depositions.

### ETHICS AND PROFESSIONALISM TRAINING PROGRAMS

The firm regularly conducts ethics and professionalism programs as sessions within larger career development programs and as stand-alone programs. Recently an Attorneys' Liability Assurance Society instructor presented programs on litigation and transaction loss prevention.

### TIME KEEPING TRAINING PROGRAM

Shareholder-taught best practices seminar - offers practical tips for recording billable time and for drafting time entries that demonstrate real value to the client. With associates and paralegals in attendance, participating shareholders in multiple offices reinforce and add commentary during the presentation.

### BAR AND ORGANIZATIONAL INVOLVEMENT

The firm's involvement with bar and other professional organizations give significant development opportunities to our attorneys. Practice group leaders, shareholder mentors, and firm management encourage and support associate participation and often assist in organizational placement and leadership development.

## PRACTICE SKILLS DEVELOPMENT

### WRITING PROGRAM RESOURCES – ALL ASSOCIATES

- **Workbooks:** Carlton Fields gives all new associates a copy of Bryan Garner's *Legal Writing in Plain English* and Strunk & White's *The Elements of Style*.
- **Writing Tips DL Group:** The firm's best writers contribute writing tips to the monthly DL Writing Tips listserve.

### TRANSACTIONAL WRITING PROGRAM

- **Workbooks:** *Working with Contracts: What Law School Doesn't Teach You*.
- **A Manual of Style for Contract Drafting:** This manual, available in all offices, focuses on how to express contract provisions in prose that is free of the problems that often afflict contracts.
- Practice Group Leaders periodically send associates to targeted external writing workshops. These typically are half to full-day programs.
- **Coming soon:** The firm's transactional writing experts are working on practical drafting programs focusing on 'the basics', advanced hands-on enhancement of skills, opinion writing, and more. Stay tuned for announcements of these and other written guides and resources available in the future.

### LITIGATION WRITING PROGRAM

- **Workbooks:** *Trial Lawyer's Manual* - The firm's top litigation writers developed this practical manual. They update periodically and give to every incoming litigator.
- **Basic Writing Brown Bag Lunch Series:** Sylvia Walbolt, one of the firm's top writers, will conduct this series and provide practical writing advice.
- **Advanced Writing Program:** Participating associates complete a writing assignment and receive personalized one-on-one comments from several of the firm's top writers. Attendance is limited to just a few participants to ensure personalized feedback.
- **Writing Mentors:** Litigation associates who need extra-focus on their advocacy writing skills and techniques can request writing mentors. Mentors periodically review writing and give comments, suggestions, and direction on improvement.



## MARKETING AND BUSINESS DEVELOPMENT TRAINING

The business aspect of a legal career is more important than ever. The firm weaves education on client development, networking, client service, and other marketing related topics at multiple intervals and in various stages in an attorneys' development.

### CARLTON FIELDS FORUMS

The firm invites clients and industry leaders to share insights on their business and their industry, as well as provide best practices on client service and value. Recent forum topics include "Diversity in the Legal Profession" and "Value Added Services for Our Clients."

### BUSINESS DEVELOPMENT SKILLS TRAINING PROGRAMS

The firm periodically hosts presentations on business and professional development topics, including networking and community involvement.

### CLIENT SERVICE

Select senior shareholders participated in a program to institutionalize client service standards and train attendees on adding and enhancing value in the client relationship. A firmwide version of the program is launching soon.

### MANAGEMENT TRAINING

The firm's CEO, leadership, and external consultants periodically train senior management in areas of client service standards, strategic planning, and practice management.

### PUBLISHING

The Marketing Department locates publishing opportunities for attorneys. It seeks to raise an attorney's profile and help improve substantive knowledge, both vital to long-term business development.





## DIVERSITY AWARENESS TRAINING

Carlton Fields regularly receives recognition for its extremely diverse attorney and employee population. The firm also walks the walk and teaches inclusion in business and community involvement.

**HISTORICAL.** In 2005, Carlton Fields conducted Diversity Training for every employee in the firm. Professional diversity trainers facilitated two-hour sessions designed to educate attorneys and staff on the concept, issues, and benefits of diversity, inclusion, and cultural sensitivity at Carlton Fields.

**UPCOMING.** The 2009 firmwide diversity program consists of small, facilitated discussion sessions - live in all offices - with vignettes outlining diversity issues.

## ONLINE TRAINING

Carlton Fields continues to innovate and collaborate in this area to assure its attorneys are on the cutting edge of on-demand training. Attorneys craft learning on their schedule with access to on-demand training, allowing for a more client-responsive and personalized development.

**CF UNIVERSITY ONLINE** The firm is building 'CF University Online' so attorneys can self-access internal programs 24-7. As it expands, CFU Online will eventually host videos from all firm programming, practice group experience tracks, MCLE tracking, live-course schedules and registration, as well as be a resource area for materials.

**WEST LEGALEDCENTER** West LegalEdcenter (WLEc) is an internet service available for all Carlton Fields attorneys and paralegals. It has a current and comprehensive library of online CLE programs (nearly 8,000) in every practice area, including programs from over 200 of the nation's most respected local, state, and national bar associations and distinguished CLE providers. WLEc offers previously recorded programs, which users can take anytime, as well as live webcast programs.



## DEVELOPMENT THROUGH COMMITTEE INVOLVEMENT

Using the 'learn by doing' philosophy, the firm encourages all its attorneys and employees to get involved with the firm through volunteering and committee work. Attorneys build leadership, networking, and teamwork skills quickly and comfortably in this setting.

- **Professional Development Committee** – Steers attorney training, mentoring, and integration programs.
- **Associate Relations Committee** – Ongoing forum for associates to communicate ideas, insights, and issues to leadership.
- **Retention Committee** – Builds loyalty between lawyers and the firm; helps create and maintain environment that fosters long-term retention of all lawyers.
- **Diversity Committee** – Implements the firm's commitment to an inclusive workplace. The Committee develops initiatives and identifies best practices that promote diversity and the recruiting, retention, and professional development of diverse attorneys.
- **Associate Compensation Review Committee** – Oversees the associate review and compensation process. Chaired by shareholders, the committee includes two associate attorney members to engage all perspectives in the process.
- **Best Workplace Taskforce** – All levels of firm employees (attorneys, paralegals, LAAs, and support department staff) brainstorm ideas to keep the firm a vibrant, exciting go-to destination for workers.
- **Practice Support Committee** – Monitors, maintains, and integrates all firm-wide systems supporting our attorneys in the practice of law, including information services and other technology, the library, and all paralegal, secretarial, and other support staff functions.

## EXTRAS

The firm is constantly assessing the needs of its attorneys and regularly adds new professional development opportunities to help individuals, groups, and the overall firm. All departments at Carlton Fields contribute to the growth of our attorneys: Professional Development, Marketing and Client Development, Recruiting, Human Resources, Conflicts, Finance, and others.

### **INDIVIDUAL FINANCIAL PLANNING**

Shareholders are entitled to a financial planning consultation with a planner of their choice after completing two years of employment with the firm and reaching age fifty.

### **TASK FORCES**

Groups of attorneys that focus discussion and updates on important, cutting-edge legal issues and offer billable services to others across the firm. Current groups include E-discovery, expert witnesses, and class actions.

### **APPLICATION AND COMPUTER TRAINING**

Carlton Fields has a cutting edge vision on technology. The firm consistently migrates to the newest and most efficient software and hardware to make our attorneys more nimble and effective. Our professional support at every level (finance, information services, conflicts, etc.) work extremely hard through training initiatives to assure attorney understanding and functionality of the newest programs and devices. Recent additions include: iPhones, MetaStorm, and Paperless Proforma.



“The end is in the beginning and lies far ahead.” - Ralph Ellison

Professional Development at Carlton Fields is a dynamic collaboration between the attorney and the firm. We look forward to providing outstanding service and tools in your professional and career development at the firm.

**PROFESSIONAL DEVELOPMENT DEPARTMENT**

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