

Practice Supports: Coach and Advisor Network

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Outline

Overview of the Coach and Advisor Network

Statistics - Who's Accessing and Why

Feedback

What We Need

Call to Action

CAN – What is its purpose?



Increasing Competence and Confidence through Connection

CAN – What sets it apart?



Launched in November 2016



Serves as a volunteer network of lawyers and paralegals supporting other licensees through short-term engagements that focus on client work or developing best practices



Licensees can request to be matched with a coach or advisor when they need it

CAN's key focus?

CAN focuses on:

- Shorter-term engagements
- That are outcome-oriented
- Practice focused
- High impact



The Right Support: Two Distinct CAN Options

Coaching

Do you want to develop a specific skill or tackle a practice management best practice over the next few months?

A Coach can help. You will begin with a 1.5-hour session with a Coach followed by a series of five 30-minute sessions set on alternating weeks, resulting in approximately a 3-month commitment.

[Request Time with a Coach](#)

Advising

Do you have a question about a client file that would benefit from a phone call with a seasoned practitioner?

An Advisor can help. An Advisor will provide you with up to 30 minutes of guidance on a substantive or procedural issue on a client file.

[Request Time with an Advisor](#)

Advising

- 30 minutes
- By phone
- Substantive or procedural issue on a client file
- Guidance from an experienced licensee to help resolve the issue
- Practice area specific



Practice Areas

- Administrative Law
- ADR/Mediation
- Bankruptcy & Insolvency
- Civil Litigation
- Commercial
- Commercial Contracts
- Construction
- Corporate
- Criminal
- Employment
- Environmental
- Estates
- Family
- Health
- Immigration
- Indigenous Matters
- Intellectual Property
- Municipal
- Privacy
- Real Estate
- Tax
- Workplace Safety
- Workplace Safety & Insurance Appeals Tribunal

Advising Requests

My client is ready to make a settlement offer. How should I proceed?

This is my first time filing a motion for summary judgment. What is my next step?

How do I resolve this custody dispute?

How do I protect the interests of my corporate client in this asset sale?

What form do I use for this *Provincial Offences Act* matter?

Should I close this real estate deal?

Advisors Offer...



At least 5 years of **practice or provision of legal services**



A fresh **perspective**



Safe space to ask a “silly question”



Experience to find a starting point or avoid “reinventing the wheel”



Suggestions for next steps on issues that move client matters forward

The Advisor is **modelling** problem solving and increasing the Participant's competence and confidence.

Coaching

- 4 hours over 3 months
- Typically, 1.5 hour initial meeting, and five 30-minute meetings on alternating weeks
- By phone/video conference
- Practice management best practices or transitions



Coaching Topics

- Advocacy
- Career Development
- Communication Skills
- Contingency Planning
- Delegation and Supervision
- Entrepreneurial Approaches
- File Management
- Financial Management
- Firm Management
- Hearing Prep
- Interview Techniques
- Opening your own practice
- Paperless systems
- People Management
- Precedent Development
- Project Management
- Relational Competence (EDI)
- Succession Planning
- Technology Management
- Time Management
- Transactional Work
- Transitioning to Practice following a leave of absence
- Winding up your practice
- Work-life Balance Strategies

Coaching Requests

How can I better manage client expectations?

What steps should I take to grow my practice?

How can I find more hours in the day?

How should I develop a client intake precedent?

How can I get my invoices paid faster?

Am I ready to open my own practice?

Coaches Bring ...



Curiosity and interest in giving back



A willingness to engage with the Participant's experience



An ability to **let go of assumptions** about what might be the problem or solution



A process to support **goal setting, action planning** and **accountability**

The Coach is **building problem-solving and decision-making capacity** in the Participant.

Who is CAN?

1,147 engagements (**35%** increase) – **824** Advising, **288** Coaching

Participants

- **89%** are sole practitioners or work in small firms
- **90%** are lawyers, **10%** are paralegals
- Median year of licensure is **2018**

Volunteers

- **458** active on roster
- **87%** are lawyers, **13%** are paralegals
- **72%** are sole practitioners or work in small firms
- Median year of licensure is **2003**

2022 Top Requests for Time

3 top requests for Coaches

- Opening Own Practice (37%)
- Career Development (36%)
- File Management (27%)

3 top requests for Advisors

- Civil Litigation (18%)
- Real Estate (18%)
- Estates (17%)

Feedback Stats

- **90%** of coaching Participants were satisfied with the engagement and indicated they made progress towards their goal
- **94%** of advising Participants were satisfied with the engagement and indicated they received assistance with the issue presented, and
- **95%** of Participants indicated they are likely to recommend CAN



Feedback from Coaching Participants

“My Coach was a great teacher. She motivated me with great knowledge from her own experience. She went above and beyond to advocate for me. She continues to be a guiding hand.”

“My Coach went above and beyond my expectations of the program. It was an educational and valuable experience.”

“[My Coach] was incredibly insightful and supportive. An excellent mentor.”

“[My Coach] opened my eyes to working towards a succession (and disaster) plan for my practice. I now feel empowered and excited about the future of my practice. Simply put, [My Coach] has changed my life.”

“I got more from my Coach than I anticipated or was looking for; it was very positive and informative experience overall.”

Feedback from Advising Participants

“[My Advisor] was very kind and knowledgeable on the issue I was having. He provided a high degree of information and was thorough in his responses. I use this service every time I feel I need guidance.”

“[My Advisor] was extremely knowledgeable, effective, and kind. Thank you.”

“[My Advisor] was down to earth and encouraging. I often feel intimidated by senior counsel, but she was so kind and helpful and generous with her time.”

“My Advisor was excellent. He was thorough and got back to me very quickly.”

“[My Advisor] was very knowledgeable, friendly and empathetic. This is the best mix of traits to have as an advisor. I greatly benefited from our meeting, and I trust that many other lawyers will do too.”

Matching stats tell the story

Advising
Requests:
89%

Coaching
Requests:
51%

How do I become a volunteer?

Apply

Complete an online application and answer a few questions about your experience

Intake Call

Have an intake call with a member of the PSR team to understand the process and answer any questions

Ready!

Once approved, you're on the roster and ready to be matched with a licensee who needs you!

Call to Action

- CAN is actively seeking new volunteers ... Help us grow our roster!
- Promote CAN and help us raise awareness
- Provide opportunities for us to connect with your members



Questions?

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