UPLEVEL CPD

MONEY MINDSET FOR WOMEN LAWYERS

Presented by Paula J. Price, LL.B./B.C.L., CEC on behalf of
UPLEVEL CONTINUING PROFESSIONAL DEVELOPMENT CORPORATION

COURSE DESCRIPTION

FORMAT

The course, *Money Mindset for Women Lawyers*, is a pre-recorded course that is available for purchase on-line to be viewed at the participant's convenience. The course consists of an introduction video and five learning modules. Each module is made up of a video lesson with corresponding exercises in a companion workbook. Each lesson is a narrated slide presentation lasting between about 17 and 25 minutes. Along with the introduction, the total duration of the video lessons is about 110 minutes. Course participants will be provided with access to pdf copies of the slide presentation for each module, a reference sheet containing hyperlinks to resources referred to in the slides and a coaching workbook. The workbook contains exercises corresponding to the lessons in each module. Those exercises are designed to have participants articulate for themselves what they are learning, what they hope to accomplish and how they can apply the learning and tools contained in the lessons in their own legal practice.

COURSE CONTENT

Introduction (7 minutes)
The introduction summarizes the course objectives, describes each module and explains how to approach the course to obtain the best results.

Module 1: Introduction to Money Mindset (20 minutes)
Module 1 discusses the disparity in pay between women lawyers and men lawyers in Canada, referring to recent data. It also highlights a number of local and national initiatives undertaken to promote women lawyers in practice and the findings made about challenges faced by women lawyers, including access to high level work, mentorship opportunities and opportunities for professional and business development. The lesson focuses on the particular challenges that women lawyers face in relation to money, including the effect of societal influences on their thinking about money, and suggests that a shift in mindset along with individual initiatives complement existing institutional initiatives designed to promote and advance women. The workbook exercises focus on the participant's views about money and what she seeks to achieve from the course.

Module 2: Pain Points in Practice (17 minutes)
Module 2 discusses the connection between thoughts and outcomes and, in particular, how undermining thoughts and assumptions about money can materialize as challenges relating to money in a legal practice ("pain points"). Those pain points include challenges relating to billing practices (for example, chronically writing off or writing down time spent working on a file, failure to adequately communicate with clients about fees, failing to

invoice in a timely way) and challenges relating to professional development (for example, taking on a disproportionate share of non-billable assignments, failing to seek advancement opportunities or opportunities for further work). The workbook exercises focus on identifying challenges that take place in the participant's practice that relate to money as well as the undermining thoughts that underlie those challenges.

Module 3: Professional and Ethical Obligations (20 minutes)

Module 3 contains a high level review of a BC lawyer's professional and ethical obligations as they relate to money with reference to the Code of Professional Conduct, the Legal Profession Act and the Law Society Rules. The lesson refers in particular to the obligations set out in the Code that relate to reasonable compensation, integrity, self-respect and competence. The module reviews a number of initiatives that lawyers can take to be proactive in their professional development (eg. creating a plan for skills development and supporting that plan by taking courses, joining sections and seeking learning opportunities) and offers practice suggestions around money (eg. keeping meticulous time records, discussing fees early and openly with clients and regular billing practices). The workbook exercises ask participants to identify skills that they would like to develop and activities that support the development of those skills.

Module 4: Measured Shifts in Thinking (25 minutes)

Module 4 sets the groundwork for Module 5, which focuses on protocols to be employed in challenging situations. Starting with the premise of neuroplasticity - that the brain can be 'rewired' with intentionality of thought - the participant is requested to create a set of productive thoughts from which she will be positioned to more confidently establish more pro-active and effective protocols in her practice as they relate to challenges concerning money (identified in Module 2). The workbook exercises ask participants to rewrite negative thoughts about money and themselves and create new ones that are factually objective and empowering.

Module 5: Protocol, Implementation and Accountability (25 minutes)

Module 5 revisits challenges relating to money that participants face in their practice and offers suggestions for protocols and scripts that participants can create and use in their own practice. Protocols may, for example, include practices and scripts for setting clear expectations around fees, having transparent and regular communication with clients about fees and setting boundaries. Module 5 also offers suggestions on how to implement protocols and develop a strategy for accountability. The workbook invites the participant to create protocols and scripts that are responsive to the challenges she has in her own practice, as identified in Module 2. The workbook also contains a final exercise that anchors the participant's learning and encourages her to commit to a course of action.

PROGRAM FORMAT/ ACCESS TO THE COURSE PROVIDER

The program format is an Interactive Online Course. The participant can email or telephone the presenter, Paula J. Price, with questions and receive a timely reply. There are questions posed in the companion workbook which are designed to have participants apply the concepts and learning to their practice.

Participants are invited, at the end of each video, to contact the presenter with any questions, comments or feedback.

QUESTIONS

Please contact Paula J. Price with any questions about the course at pprice@uplevellawyercoaching.com or 778-228-0730.

ABOUT THE PRESENTER

Paula J. Price is a lawyer licensed to practice law in the province of British Columbia and certified executive coach. She practised for over a decade as a commercial litigator at a national law firm in Vancouver. She recently transitioned to focus more on lawyer coaching so that she can support lawyers and help them thrive in practice. She continues to do legal research for sole practitioners and lawyers at small firms. Paula founded Uplevel Continuing Professional Development Corporation so that she could create and deliver interactive, practical and impactful continuing professional development courses for lawyers that integrate learning about legal practice with executive coaching principles.