

**WORKBOOK**

# **PROFESSIONAL PROSPERITY FOR LAWYERS**

**FIND THE PERFECT JOB AND  
CREATE YOUR IDEAL CAREER**

**GREG YATES**

**WORKBOOK**

**PROFESSIONAL PROSPERITY FOR  
LAWYERS**

**Find The Perfect Job And Create Your Ideal  
Career**

**GREG YATES**



# **TABLE OF CONTENTS**

**Preface**

**Chapter 1: Introduction**

**Chapter 2: The Framework**

**Chapter 3: Management in Distressed Business (Purpose, Passions & Vision)**

**Chapter 4: Inventory (Strengths & Interests)**

**Chapter 5: Research And Development (Clarity & Focus)**

**Chapter 6: Strategic Planning And Execution (Priorities & Action)**

**Chapter 7: Marketing And Sales (Personal Branding & Promotion)**

**Chapter 8: Information Technology (Productivity & Reflection)**

**Afterword**

**Appendix**

**Author Bio**

# Chapter 1

## **INTRODUCTION**

In *Professional Prosperity For Lawyers: Find The Perfect Job And Create Your Ideal Career*, I discuss lawyer career revitalization in a broad way to allow every lawyer, from a law school student to an Am Law 100 senior equity partner to use the book. All lawyers will find insights and tips they can use now to address their specific career issues and achieve success, prosperity and personal fulfillment. The key is to not only read the book but to use the information and take action to implement your career revitalization process.

This workbook was created to help you take action and implement your career revitalization process. When reading a book, it is easy to read the questions and exercises, but continue reading without answering the questions or completing the exercises. The questions posed and exercises suggested in the book are presented in this workbook for ease of access. Additional questions and exercises have been added to the workbook to make it even more valuable to you in implementing your career revitalization process.

The workbook is organized in the same modular format as the book to make it user-friendly. You can use the workbook to go through the complete career revitalization process, or use particular sections to address issues you are confronting now. While you can skip around in the workbook, I recommend you answer the questions and complete the exercises in order. To a significant degree, the questions and exercises build on prior questions and exercises. It's most efficient and effective to answer the questions and complete the exercises in order.

I cannot urge you strongly enough to take the time to answer the questions and do the exercises. You will increase the impact this book has on your professional career revitalization by at least ten times, if not a hundred times, by taking the time to answer the questions and complete exercises. The process will help you find your perfect job and create your ideal career. When you finish answering the questions and working through the exercises, you will have your strategic career plan, goal list, and action plan. You will be prepared to take the exact steps you need to find success, prosperity and personal fulfillment in your career.

## **Chapter 2**

# **THE FRAMEWORK**

A brief framework for your career revitalization process follows for those of you who haven't read the book yet, or as a quick refresher of the philosophy and principles of the process.

### **Your Career Revitalization As A Business Turnaround**

I was a corporate turnaround, reorganization, and workout lawyer. My purpose as an attorney was to help distressed companies successfully turnaround and reorganize their businesses. I worked with owners, executives and managers who were overworked, stressed and miserable. A few were just bored, waiting for a pick slip. Most were frightened and had uncertain futures.

I now work with lawyers who have no clear path leading to their perfect job and ideal career. Many are now going through experiences comparable to those of the owners, executives and managers of distressed businesses.

In assisting lawyers without perfect jobs or clear career paths, the similarities between those attorneys and the owners, executives and managers of a distressed company became evident. I realized I could use my knowledge and experience from

the corporate turnaround and restructuring world to assist lawyers who didn't have a perfect job or clear career path. Lawyers with a distressed career.

The chart below shows various functions of distressed businesses that corporate turnaround professionals consider in their work. It also displays the corresponding areas of lawyers' careers and the underlying ideas of the career revitalization process:

<b>DISTRESSED BUSINESS</b>	<b>LAWYERS CAREER</b>	<b>IDEA</b>
Management	Purpose & Vision	Reconsider & Re-Vision
Inventory	Skills & Interests	Resources
Research & Development	Services	Research
Strategic Planning & Implementation	Strategic Plan, Goal List & Action Plan	Revitalize
Marketing & Sales	Personal Branding & Promotion	Relationships
Information Technology	Tools & Reflection	Review

If you manage your career as a distressed business, what can you learn from successful corporate turnaround professionals? Three key overarching concepts stand out:

- Urgency & Focus
- Accurate Data
- Massive Action

To revitalize your career, you must take massive action. However, focused action based on accurate data is necessary to achieve success, prosperity and personal fulfillment.

You must manage your career as a business with the same mindset entrepreneurs have in managing their businesses. The characteristics of an entrepreneurial mindset are:

- Consistent Action
  
- Passion
  
- Vision
  
- Tenacity
  
- Self-Belief
  
- Toleration of Ambiguity
  
- Flexibility

## Principles Of Career Revitalization

Your career revitalization process is based on four principles.

- Finding a perfect job and achieving an ideal career is a holistic endeavor. When you envision your perfect job and ideal career, you consider all areas of your life, not just your career.
- Your idea of a perfect job and vision of an ideal career will be tempered by your strengths and interests. You may have visions (possibly hallucinogenic) of being a Supreme Court Justice. But, if your strength or interest is not in the detailed intellectual analysis of arcane constitutional issues, reconsider your vision of being addressed as “Justice Big Shot.”
- Collaboration with others is essential. Seeking and accepting help throughout the career revitalization process is crucial. Whether the help is from family, friends, colleagues, mentors, advisers, consultants or coaches. Working collaboratively with others is invaluable in your career transition process.
- You will apply certain economic and business concepts while working through and implementing the career revitalization process. Don't worry; I won't go all mathematical on you like an Econ professor. You will just use concepts that are more common sense than anything. The concepts give you alternative

frameworks and perspectives for considering where to invest your time, effort and money for maximum impact.

- Opportunity Costs
- Law of Diminishing Returns
- Return on Investment or ROI
- Sunk Costs
- Important/Urgent
- 80/20 Rule (Pareto Principle)
- Continual Learning

# **Chapter 3**

## **MANAGEMENT IN DISTRESSED CAREERS**

### **(PURPOSE, PASSIONS & VISION)**

#### **Rediscovering Your Purpose, Passions & Interests**

Review and reconsider your past. It is the best way to rediscover your purpose and passions. In reviewing your past, you will identify your core beliefs, values, and purpose in life. You will also rediscover your passions and interests.

Your ideal career is founded on your purpose, passions, and interests. Many lawyers disengaged from their work and unhappy in their careers lose the connection between the work they do and their purpose and passions. A primary aim of the career revitalization process is reconnecting you with your purpose and passions and helping you align your work and career path with your purpose and passion.

The questions and exercises in the following sections guide you through doing the archeological work on your past. You will rediscover the parts of yourself that make you who you are and prepare you for success, prosperity, and personal fulfillment. This will help you build a solid foundation for your ideal career.

## Life History Exercise

What did you want to be when you grew up? A doctor, lawyer or Indian chief? A rock star, firefighter, video game designer or professional athlete?

Remember what you wanted to be when you were younger. It will give you insight into your ideal career path. Nope, this doesn't mean you should quit your job and pursue a career as a rock star or professional athlete. The real benefit in considering what you wanted to be when you grew up is to identify your purpose in life, your "Why." Not focusing on the "what" you wanted to do when you grew up, but instead focusing on the "why" you wanted to do it.

For some lawyers, they wanted to be a lawyer when they grew up. Why? Because they saw television shows or movies about lawyers and thought lawyer's lives looked fun and exciting. Unfortunately, now you are a lawyer and know the TV and movie versions of lawyers are not reality. Far from it.

Other lawyers wanted to be lawyers when they grew up because their family decided that was the right career for them. Again, this rarely works well since you followed someone else's dream, not your own.

But I guess even those lawyers who always knew they wanted to be lawyers also had periods where they wanted to be something else. If you didn't always want to be a

lawyer, you wanted to be a teacher, rock star, or police officer. Why? You wanted to help other people. You wanted excitement and adventure. You wanted to wear a uniform.

Did you want to be an archeologist or an astronomer? Why? You liked to learn and explore new ideas. You wanted to experiment and discover new things.

Go back to your younger days and remember what you wanted to be when you grew up. You wanted to be different things at different times. Remember them all. Now, think back and identify the reasons you dreamed about those occupations. What were you passionate about? What motivated you?

Was your purpose fame, fortune, adventure, freedom, knowledge, discovery, power or a desire to help others? Or, something else? The key is to remember what turned you on, what you were passionate about, what motivated you.

How did what you wanted to be change over time? Did you have a clear idea from an early age you stayed focused on? Or, did you change your idea of your dream career as you got older and gained more knowledge about yourself and particular occupations? Continue searching for why you changed.

Stop this inquiry into your past when you reach the point where your “why” became “it was practical.” While practical is worth considering in creating your ideal

career path, it's not relevant at this stage of the career revitalization process. We all must have food and shelter. But it's your purpose and passion that lead to a career path where you are energized and motivated. Where you will find success, prosperity, and personal fulfillment.

The whole point of considering what you wanted to be when you grew up is to identify your purpose and passions. The things you get jazzed about. Things that interest and excite you.

Do thoughts about what you wanted to do when you were younger still excite you? Do you think "what if"?

Is so, you have a starting place for building a foundation to revitalize your career path. Perfect jobs and ideal careers incorporate your purpose and passion. Energy and motivation result. Without those elements, your job is just a way to earn a living with the stress, drudgery and desperation that go with that career path.

On the following page, write about what you wanted to be as you were growing up. Try to remember the reasons you wanted to do specific things. Write about your interests. What activities were you involved in? What were your dreams for your future?



After you have finished writing about your dreams and interest while growing up, these exercises may help you tease out your purpose, passions and interests.

### **Favorite Stories Exercise**

Write about some of your favorite stories you were from your younger days. Write about your memories of at least ten events in your life you remember vividly. These stories should be about times when you were happy and engaged. Where you were enjoying what you were doing.

When you have finished writing, review what you have written. See if there are any common themes. People, places, activities or other elements that form a pattern. Look for commonalities related to why these events and stories that resonate with you more deeply. Examine them to discover any purpose, passions or interests that surface.



## **Hobbies/Interests**

What are your hobbies and interests outside of work? What were your hobbies and interests when you were younger? List your hobbies and interests, both now and in the past. Do you see any patterns? Why these hobbies and interests and not others? Do any of the hobbies or interests suggest a purpose, passion, or interest you have forgotten?

## **People/Ideas Attracted To**

Another way to flesh out your purpose and passion is to consider the people and ideas that interest you.

Who are your ten favorite lawyers, friends, and public figures? Why? Look at your favorite people and see if there are things they have in common. That can give you clues about yourself. Are these people in particular industries? Do they do similar work? Are their interests similar?

If you find yourself attracted to people with a common interests or personalities, you may discover insights into your purpose, passions or interests.

## **Interests**

Make a list of all your interests. Brainstorm and jot down any interests you have now or have had in the past.

What interests you about the jobs you've had?

What did you like to do in your jobs?

What were you doing when you had those periods when you were in the flow and lost track of time?

Don't limit this exercise to your legal jobs. Examine your non-legal jobs. Look back at your interests in your life.

What subjects interested you in school?

Once you get a comprehensive list of your interests, see if there is any pattern to them. Do some fit well within a broader group? Are certain skills used to engage with those interests? Do your interests come and go, or remained consistent?

Rank your interests according to what is most interesting to you now. If you had done this exercise five years ago would it the list be similar? Or, is your pattern to continually develop interests where you are fixated for a while and then move on to other areas of interest? If your interests are stable and constant, you will likely be fulfilled in a job that allows you to work in those areas of interest. If your interests are evolving, you need to find jobs that allow for that evolution. Or, realize that you may be someone who will change jobs on a more regular basis than the average lawyer.

If you are still having trouble rediscovering you purpose, passions, and interests or just want to consider them in a different way, ask yourself these questions:

Why?

Why did you become a lawyer?

What is your why now?

Why do you get up in the morning?

Why do you go to work?

Why do you have your current job and career path?

What is your definition of success?

Your answer to these questions will help you clarify your purpose, passions and interests. It will help you identify the reasons for your current dissatisfaction. The answers will give you clues about jobs and career paths that will allow you to achieve success, prosperity and personal fulfillment.

Take some uninterrupted time over the next few days to think about these questions. Do it while you are in the shower or taking a walk. Jot down the answers. Your thoughts are valuable and will slip away if you don't write about them.

Unless you know what is important to you on a deep level, your purpose, passions and interests, your "why," you will continue to be dissatisfied with your job and career path.

## **Practical Passion**

Practical passion is found where the activities you enjoy and the skills you excel at intersect with what other people want and will pay you to provide. Two elements are necessary for practical passion. Skills you excel at and activities you enjoy doing, and someone who will pay you to provide a service where you use those skills and activities.

To discover your practical passion, identify the skills you both excel at and enjoy doing. The Inventory chapter includes questions and exercises to help you identify the skills you excel at. Use your knowledge and creativity to brainstorm ways you can use those skills and activities to offer services that other people want and will pay you to provide. This exercise is more powerful when done in collaboration with others – including mentors, advisers, consultants, or coaches – than when trying to do it in isolation.

## **Re-Visioning Your Career**

Vision is related to your purpose and passions. Your vision is a distinct picture of how your purpose and passions will manifest themselves in your career. Your vision is a detailed picture of your career and life and incorporates your purpose and passions.

### **Your Vision**

What is your vision of your future?

If your first answer to the question is to be rich or powerful, you need to dig deeper. While money and power may be goals, most people lose whatever passion they have if there's no purpose behind making the money or having the power. Lawyers whose vision of the future is focused only on money or power are usually empty and miserable even if they have large incomes or exercise great power.

Successful, prosperous and personally fulfilled lawyers have a vision of the future. It is based on their purpose and passions in life. These lawyers think about the big picture. Not only about their next client or deal.

Vision is a long-term concept. A successful lawyer envisions the future vividly and with great specificity. Every action they take and every goal they set is focused on this vision, and what they can do to move closer to their ideal career path. By envisioning your perfect job and ideal career within the context of your desired lifestyle, you bring your purpose and passions to life.

What is your vision of a perfect job and ideal career?

This is a crucial question to answer in your career revitalization process. There are few "musts" within the career revitalization process, but this is one. The rest of the career revitalization process hinges on having a detailed vision of the perfect job and ideal career you can train you focus on.

Envisioning your ideal career is not a one-time exercise. You will revisit this process regularly throughout your career. As you progress on your career path, your purpose, passions and interests may evolve, and your experiences may lead to revisions in your envisioned perfect job and ideal career. While it's crucial to have a vision of your future to aim your focus, it's also crucial to periodically examine your vision and make adjustments as necessary.

### **Career Visioning Exercise**

Imagine your best job and life at three points; say 5 years, 15 years and 30 years from today. This is the time to be open, creative and non-judgmental. Let the ideas and images flow without censoring whether you think they are realistic.

What do you see? Be specific.



Why are you doing what you envision?

What are you doing in your job and life?

Where are you doing it?

What gives you pleasure and how do you measure success?

Who are the people you are closest to in your family, local community, professional community, and life? What do you do for fun?

Describe a typical day.

The more you can get into the picture of your life the better. Envision seeing yourself, hearing people around you talking, and the feel, smell and touch your surroundings. This vision will have a significant impact on your career and life.

Write about your vision. Use stream of consciousness as your guide. Avoid using an eraser or editing your writing. Let it all out. Get it all down on paper.

The clearer your career vision is, the more useful it will be in your career transition process. Envision your career. The more specific, the better. Every sensory perception you envision is vital.

This step is important for you to get everything in your ideal career clearly specified. Don't filter yourself now. In later steps, you will prioritize and consider these items through a more realistic lens. Not now. Let your imagination run wild.

Write about you vision. These questions may help you get started.

What do you do during the day?

Who are your clients?

Who are your colleagues?

Where are you during the day?

What are you wearing?

What are your client's problems?

What skills do you use to help solve your client's problems?

Do you sense any smells?

What are your clients wearing?

What do you see when you look around?

How do you communicate with your clients?

How much money do you make?

What services or products do you offer?

How do your clients find you?

How are you compensated?

What sounds do you hear?

What do you do in the evenings?

What do you do on the weekends?

What tastes do you sense?

Where do you live?

What are your hobbies?

What recreational activities do you participate in?

What does your family look like?

Who are your friends?

What are your interests?

How are your physical condition, nutrition, and sleep?

What is most important to you?

What items are close to you when you work?

What items are essential to your work?

Spend time with your vision of an ideal career sharply in focus and write about everything that comes into your mind. Don't censor yourself. Just write.

Use the questions above to spark more thoughts.

Write about them.

This is an important step. Take it seriously.



These three questions are interrelated, but consider them separately to help clarify what you will consider during the process of envisioning your perfect job and ideal career.

Like all visioning exercises, you begin with a picture of the future in a perfect world with no limits or consideration of practicalities. Examination of those potential constraints will come later.

### **Who Are Your Ideal Clients?**

You want to envision what an ideal client looks like in great detail. Who are the clients you serve in your career? What group of people do you want to help?

All lawyers serve other people. It doesn't matter whether you call these people your clients, customers or employers. Lawyers who work within a firm, at a company or in government have two sets of clients they serve. They serve their employers and their employer's clients. If you work within an organization, there are two questions to answer when envisioning your clients. You must not only envision your ideal clients, but you must also envision the perfect organization to work in serving those clients.

Imagine your perfect job. Who would you be working with every day? Will your clients be retaining you for personal or business issues? Will your clients be individuals

or representatives of an organization? If the ideal clients are organizations, what level within the organization are the people you deal with regularly?

In doing this exercise, remember the people you like to be around in both work and play. Consider the character traits of your ideal clients. Are your clients easy-going, driven, smart, empathetic, compassionate, young or old? What motivates your ideal clients? Money, power, prestige, justice, or social responsibility.

If you are in the earlier stages of your career, you may not know people who you believe will be your ideal clients. Find out as much as you can about the people you envision being your ideal clients. Talk to professionals who work with these clients. Use your personal network to arrange meetings with people you envision as ideal clients.

What services will you offer your ideal clients? Once you envision your ideal client, you need to envision what will you be doing for them? What problems will you be helping them solve? What services or products will you be providing to these clients?

Write your thoughts about your perfect clients below.



If you will serve your clients while working for an organization, what type organizations are ideal?

If so, you also need to consider the culture of and people working within the organization. The culture and people who work within investment banks differ significantly from the culture and people who work with non-profits or government.

Your goal is to be detailed and concrete when you envision your ideal organization you envision working in to serve your ideal clients.

# Chapter 4

## INVENTORY

### (STRENGTHS & INTERESTS)

In revitalizing your distressed career, you need to conduct a thorough inventory of your life, skills, experience, and personality. When you appreciate your strengths and weakness, you can create a strategic plan to get you perfect job and create your ideal career.

#### **Employment Status**

What Is Your employment status?

Do you want to be on your current career path in the first place?

## **Pressing Critical Challenges**

Is a relationship with a spouse, child or other family member causing you pain and capturing your attention and focus? Is your job search and career revitalization efforts an attempt to help resolve those issues? Or, is a relationship with your spouse or partner broken and irreparable to where a separation or divorce is unavoidable?

## **360-Degree Evaluation**

You need an unbiased evaluation of your current career. Total objectivity. No holding back.

The best way to evaluate your career is to ask for honest feedback from people you work with every day. People above and below you. Your clients. Even close professional acquaintances at other firms or employers.

Lawyers are resistant to evaluations, most people are. We are risk adverse and don't want to hear negative feedback. We don't like to ask questions we don't already know the answer to (remnants of Moot Court or Trail Advocacy), are pessimistic, and

expect the worst. And, what if the evaluation is none too complimentary? We need to hear that in the worst way.

My experience, both personal and with many other people going through an evaluation process, is that we don't see ourselves as well as we think. Some of us overstate our positive qualities and strengths and understate our negative qualities and weaknesses. Some of us are just the opposite. We don't believe in our strengths and think we are weak in many areas. Whichever camp you fall into, your evaluation is likely not to match the evaluator's judgments in many respects.

If you're lucky, you've been through a recent comprehensive evaluation process. Go back and reconsider the feedback and comments with an open mind. Try to learn, not defend or rationalize.

Whether you had been through a recent evaluation or not, ask partners and senior associates you work with to give you a quick evaluation. Ask support staff. Ask your clients. The following is a short list of open-ended questions you can ask.

- What is your general impression of me?
- What do you believe my strengths are?

- What do you believe I could do better?
- What are my best character traits?
- What are the character traits I could work on?

## **Health**

Health issues compromise your ability, energy, and motivation to take charge of your career and rejuvenate your life.

How is your health?

How are you managing stress?

Is your job causing health problems? I suspect you are not getting enough sleep, and possibly not keeping physically fit or maintaining healthy eating habits.

A comprehensive physical exam must gauge your health. If you haven't had an exam in the past year, schedule one today.

Evaluate your mental, emotional, and spiritual health for a complete picture. Be honest with yourself and solicit feedback from close family members and friends.

## **Relationships**

Your relationships will provide much-needed support for your efforts to revitalize your career. But, relationship issues can torpedo your efforts to get your perfect job and create your ideal career. After our health, our relationships are the most important factor in a satisfying and well-lived life.

Do you have a life partner?

Are they supportive?

What are their views on your current job and possible career paths?

Can you count on family and friends to support you emotionally?

How is your relationship with your spouse or partner?

If there are chronic unresolved issues with family members, the emotional stress around these matters can hinder or derail progress in other areas of your life. I am not a therapist but from personal experience I appreciate that using the services of a skilled therapist can be useful in coping with the situation.

## **Personal And Professional Networks**

Answering these questions. It will help you better appreciate your networking connections.

How broad are your personal and professional networks?

How strong are the relationships?

Has it been a while (or ages) since you connected with them?

## **Finances**

Answering these questions. It will help you better appreciate your financial situation.

### *Income*

Can you sustain your current lifestyle on your present income?

What income do you need to support your current lifestyle?

What income do you need to support your desired future lifestyle?

How stable is your income?

Does your spouse produce an income?

*Expenses*

Do you have a budget?

What are your fixed expenses?

How long can you cover the expenses of your current lifestyle with no income?

Is it possible to cut some of your discretionary expenses?

How much are you saving for your children's educational expenses and your retirement?

*Debts & Assets*

How much is your school, mortgage, auto and credit card debt?

What is the minimum monthly amount to service the debt?

Have you explored alternative debt repayment scenarios?

Do you have any savings or investments?

Do you have assets you can sell to get cash?

If you have a partner, do they have debts or assets?

Your current and desired future lifestyle is an important factor to consider in envisioning your ideal career. Financial matters may limit you, but might not be as constraining as you fear.

### **Strengths**

It is critical to highlight your strengths and activities that interest you. Recognize those strengths and activities will be the foundation of the action you take to express your practical passion to get your perfect job and create your ideal career.

What are your strengths?



Your evaluation might be skewed or inaccurate. The evaluations you received in doing the work in the previous section gave you a good place to start your analysis. If you haven't gone through the full evaluation exercises, ask a few colleagues, friends and family members to give you their opinion on your strengths.

Your strengths include your knowledge, skills, interests and personality. Look at all your strengths, not just your technical and practice skills. Personal qualities including social and emotional intelligence are important. How do you rate? Knowledge about particular industries or technologies and skills outside the law are also significant strengths.

Your legal knowledge is what you learned in law school and your experience practicing law. It includes your general legal knowledge and your specialty practice knowledge. Knowledge gained about particular industries or types of clients while practicing law may also be valuable.

Your non-legal knowledge acquired during other phases of your formal education, in non-legal jobs and volunteer experiences, and through hobbies and other interests you developed over your life. You might even have valuable knowledge to use in revitalizing your career you picked up in high school.

The last area to consider in inventorying your strengths is your personality. In many respects, personality skills or traits where you are strong is one of the most important things to consider in getting your perfect job and creating your ideal career.

### **Knowledge**

What knowledge do you have? Categorize your knowledge. List areas where you are knowledgeable.

In what areas do you have the most knowledge relating to your career?

What areas of legal practice do you specialize in?

What industries or type clients do you know well?

What specific knowledge did you gain during your formal education?

What knowledge did you acquire outside your formal education or career related to your interests, hobbies or life?

The previous questions should stimulate thought. They will allow you to inventory all of your knowledge, including some you may have forgotten about or don't consider relevant to your career at this stage. Don't censor yourself or be modest in this exercise. This is about gathering information. You will put it all together and see how it applies to creating and building your ideal career later in the career revitalization process.

## **Skills**

Your strengths also include your skills. Now you have a list of all the areas where you are knowledgeable; it's time to focus on the skills you possess. Skills are the practical application of knowledge. You might be knowledgeable about civil procedure, but do you know how to draft a Motion to Dismiss? Knowledge is knowing, skills are doing. Skills are applied knowledge.

While being knowledgeable about something is great and can be its own reward, employers are interested in your skills. They want to know if you can do something, not

just talk about it in a knowing way. This is the major disconnect between graduating law students and their first employer. While the students have knowledge in many areas of the law, more in some areas than senior partners, many have few legal skills. And it's the skills that employers and the ultimate client desire and pay you to provide.

Review your list of knowledge. Do this for both legal areas and non-legal areas.

Then consider whether you have skills that may be outside your areas of knowledge. You may not consider yourself knowledgeable about negotiation, but you can negotiate a real estate deal. You may not consider yourself knowledgeable about cooking, but you can host a cookout for 50 people.

Be thorough in this exercise. You may uncover long-forgotten skills that might be significant in creating and building your ideal career.

Make a list of all the professional skills where you have above-average skills. From taking depositions to drafting a motion for change of venue to getting a zoning variance. List specific skills in the different areas where you are knowledgeable.

Add to your list by including non-legal skills like working with pivot tables in Excel, constructing a WordPress site or writing in Markdown language.

Include non-work skills you learned in other occupations. Even include current or former hobby such as catching fish, hosting a dinner party for 30 people or climbing tall mountain peaks.

Then rank your skills on two scales. First rate your skills by how highly you excel in performing the skill. Then rank your skills by your interest in using the skills. Compare the two lists to find where your strengths and interests coincide. Make a third list with your top ten skills on a combined strength/interest scale.



## **Personality Traits**

What are the strongest areas of your personality?

What areas of your personality are the weakest?

## **Chapter 5**

# **RESEARCH AND DEVELOPMENT**

### **(CLARITY & FOCUS)**

In this section, you will consider the specifics and details about what you are going to do, in what environment, where, and for whom? This is the time in your career revitalization process where the preparatory work leads to the discovery of actual types of jobs, environments, locations and employers. You are looking for the best fit with your priorities.

#### **Functions & Skills**

What will you be doing for the rest of your career?

What functions will you be performing?

What skills will you be using?

### **Target Markets**

Which industry or industries are you going to serve?

Which industries do you have the most knowledge of and experience in?

Which industries have problems you can solve?

What's your target market? A target market is a group of employers or clients where you focus your time and energy.

## **Location**

How well do your current office and home location match your priorities?

How easy is it for you to get to your office?

How much time does it take?

Does it make sense for to consider a more drastic geographic relocation to another city or region of the country or even the world?

Will relocating help you get your perfect job and create your ideal career? Will you be able to go from your current job to the end of your ideal career in present location?

Does your current location give you the best opportunity to follow your ideal career, or would your opportunities be better elsewhere?

## **Organizations**

You want to elicit the following information about potential employers:

- What's it like to work there?
- What's the culture?
- What is rewarded?
- What are the cardinal sins?
- What problems are they facing?
- What problems are their clients facing?
- What is the biggest advantage of working there?
- What is the greatest headache in working there?
- Who are the power brokers?
- Who are the power brokers in the area you are interested in working?
- Are they growing, declining or staying about the same size.

# Chapter 6

## STRATEGIC PLANNING AND EXECUTION

### (PRIORITIES & ACTION)

Unless you have done the work in the earlier chapters, you will likely fall short of getting your perfect job and having your ideal career. But, if you have done the preparatory work required, formulating a strategic plan and implementing that plan will lead to success, prosperity and personal fulfillment in your career and life.

### **Identify & Marshall Resources**

#### **Time**

How much time do you have to work on your career revitalization? Silly question, right? If you are working, you don't believe you have any time. If you are not working, you may feel you have unlimited time. Both beliefs are wrong.

Realistically how much time will you devote to your career revitalization? On what days and at what times?

## **Financial**

What are your financial resources? If you are not working, how long until you need an income-producing job? How much can you spend on career-related information and professional help?

## **Family, Friends, And Colleagues**

Do you have family, friends, or colleagues who can help with your career revitalization? These are people who can help in ways beyond networking. Who are these people and what can they help you with in your career revitalization?

## **Set Priorities**

### **Financial Requirements**

There is a minimum level of income which we all need to survive and live a reasonable lifestyle. There are many variables in ascertaining the amount necessary for each of us. Factors such as our spouse's income, our wealth, our debts, our lifestyle, the number of children we have, and where we live all affect the income necessary to meet our needs.

Schedule a time on your calendar to consider your finances and sketch out a rough budget at your current income level. How do you allocate your funds? What are your basic needs? What are your most desired wants?

A simple budget form is included on the next page.



## **Work Environment**

What kind of organization do you want to work in?

Will your answer be different depending on the time frame?

## **Size Of Organization**

What size organization do you want to work in? Do you want to be a solo practitioner or entrepreneur, or work in a global Am Law 100 firm or Fortune 100 company?

Do you want more freedom and flexibility, as found in a smaller organization, or more resources and varied opportunities that might be found in larger organizations?

Would the local office of the organization be the home office or a satellite office?  
Would it be a small office within a large organization, or a larger office within a smaller organization?

### **Working Conditions And Amenities**

What working conditions and amenities in the workplace are important to you?

## **Colleagues**

What type of colleagues do you want to work with?

Do you want to work alone? Do you crave friendly colleagues who relate to each other in a loose manner? Or, do you prefer to work with the top experts in your field no matter what their personalities or the nature of the working relationship?

## **Your Role**

Do you want to work alone or as part of a team?

Do you want responsibilities outside of your core job functions?

Do you want to be involved with the administration or management of the employer?

### **Geographic Location**

Where do you want to work?

Will you need the flexibility to move to a different area in the future?

What are your spouse's thoughts about geographic location, now and in the future?

Do you want to work in the central business district or in the suburbs? Do you want to live in the central business district or in the suburbs?

## **Decision Time**

Okay, time to decide. It's nice to have plenty of options, but a strategic plan must be detailed and focused on one option in each area. It's fine to have alternative strategies and back-up plans, but that is for when you reach insurmountable roadblocks in implementing your strategic plan. For now, only one choice in each area is allowed.

Once you have researched different jobs and careers, considered your options and priorities, it is time to decide. Make a decision for each category and rank the categories against each other according to your priorities.

**This exercise gives you an outline for your strategic plan to find the perfect job, create your ideal career, and achieve success, prosperity, and personal fulfillment.**

- **Type** - Firm, In-House, Government, Non-Legal, or Entrepreneurial
- **Size** - Big Law, Regional, Specialty, Local, or Boutique
- **Working Conditions And Amenities** - Specify
- **Colleagues** - Specify
- **Role** - Specify
- **Location** – Specify



The next step is to go back over your strategic plan and set goals related to your top priorities.

## **Goals**

### **SMART Goals**

The best goal setting process I have found requires you to decide on specific, measurable, attainable, and relevant goals you can achieve within a set time. This process is the SMART Goal setting process. **It's an excellent framework in goal setting work.**

## **Action Plan**

We now turn our attention to executing on your strategic plan. Your plan to identify and find the perfect job and create your ideal career. You've formulated your strategic plan with your priorities incorporated and set your short-term, intermediate-term, and long-term goals. You know where you want to go. Now, how do you get there?

You implement your strategic plan and achieve the associated goals by creating an action plan. An action plan includes all activities required for you to attain your goals. It is like a comprehensive to-do list. But what sets the career revitalization action plan apart from traditional to-do lists is that all action plan tasks must be scheduled on your calendar.

Your do-list gets those action items out of your head to free up your brain circuits for more important work than using them as a file cabinet. But, until the tasks are on your calendar, they don't lead to action. To-do lists can give rise to the opposite of action, procrastination, and overwhelm you when you see how many tasks you want to accomplish.

You use your worksheets from the goal setting section to specify tasks to put on your action list. Take every short-term goal on the goal list and write every step you must take to accomplish that goal. Make a notation of whether you can take the action immediately, or whether that action depends on you having taken prior action.

Consider all the action items you can act on now. It is best to write them on a separate sheet of paper. Examine those action items and determine which of them is most important for you to accomplish today, this week, and this month. Estimate the time it will take to complete each task. You will underestimate the time a task will take, sometimes by as much as half. Be realistic and give yourself a cushion in making estimates of the time required to complete each task. When you put the action items on

your calendar, it is much better to finish early than to not be able to finish. If you don't complete a task in the allotted time, it will create stress. Stress caused by not finishing the task, or because it compromises your time on some other matter on your schedule.

You are ready to take your action list and schedule the tasks on your calendar. Start with a calendar that has all of your pre-existing commitments. Schedule any other work or family time you need. "Okay", I can hear you screaming, "I don't have time for my existing commitments, much less any new career revitalization tasks." Agreed, you don't have the time if you want to continue to be disengaged from your work and dissatisfied with your life. Go ahead and say you don't have time. I stayed in jobs that were not perfect, and on career paths that were not ideal, for years. No, decades. What an unnecessary waste. Your career and life will not get better until you take the time to do the tasks required to find the perfect job and create your ideal career.

You need to find the time. You need to cut back on non-essential items. No more Facebook or Twitter. No more television. Shorter lunches and dinners. Less time with colleagues and friends unless you can accomplish one of your career revitalization tasks while you are with them. Don't cut back on your sleep or fitness activities. Try to increase both if you've been neglecting them. Sleep and fitness will give you more energy to work effectively and efficiently.



## Chapter 7

### MARKETING AND SALES

#### (PERSONAL BRANDING & PROMOTION)

##### Why People Buy What You're Selling

Why do employers or clients “buy” the services you are selling?

Why do employers hire you or client retain you?

Those questions are the crux of your career transition efforts. Those questions are at the root of any businesses' success and even underlie most personal relationships.

## **Developing A Personal Brand**

A good way to develop your personal brand is to study other people at a higher level who already have a similar brand. What was their career history? What skills are most important for their brand? What character traits are they known for? What organizations do you belong to? What ideas or causes do they support? How do they dress? Where do they live? Find out as much as you can about these people with a similar personal brand to the one you would like. This research will tell you two things. First, what actions you can take to build a similar personal brand. Second, confirm your choice of brands, or send you back to the drawing board before you have developed a brand you don't want to be known for in your career.



## **AFTERWORD**

Your career is a business. The methods, techniques, tools and strategies used by corporate turnaround professionals to revitalize distressed business apply to your job and career. This is true whether your vision of your perfect job and ideal career path is in the law or whether it is to leave the law.

The most important thing to remember is that information and knowledge are not enough. You will only revitalize your distressed legal career if you take action, consistently focused action! My wish for you is to take action now to revitalize your distressed legal career.

Lawyer career revitalization never ends. There may be quiet periods where you are focused on your work and personal life, have your perfect job, and believe you are on your ideal career path. However, it is best not to totally neglect your career revitalization strategic plan, goal list, and action plan.

Even if your career and life are great, you still must devote time to activities focused on your personal brand and self-promotion strategies. The old saying “dig the well before you need the water” is applicable. To achieve your ideal career, you want to continually increase the number of people that know, like and trust you. You want to develop relationships with people through your networking, direct contact and referral strategies.

Also, review the work you did on your purpose, passions, strengths and vision periodically. The world changes, you change. Over time, you may need to revise your thinking and worksheets as you evolve. If there are revisions, you may also need to consider revising your strategic plan, goal list, and action plan. You will not likely need to go through this process often, but schedule the time to do it.

If you have a significant life event such as getting married, having children, moving, or a major illness of yourself or close family member, that may be a good time for a comprehensive review and update of your career revitalization process and plans. You may also want to do this full review if there is a significant event with your employer, the industry, or in your practice area. Your employer's financial troubles and disruptions and increased competition in your industry should trigger a comprehensive review. I hope you can better sense these major events before they occur. Then, you can revise your career revitalization strategic plan, goal list, and action plan before your next career transition.

As you go through your career on your ideal career path, taking the steps suggested by the career revitalization process laid out in this book should become second nature. You will develop habits that lead to actions designed to keep you on your ideal career path. You will have devised systems to boost your effectiveness, efficiency, and productivity to stay on top of your game and headed toward achieving your ideal career.

Just like a shark in the water (insert your own lawyer joke here), once you stop moving forward you are dead. You only want that to occur after achieving your ideal career and living a long and happy life with much success, prosperity, and personal fulfillment.

Happy trails. And, don't forget to write.

## **Greg Yates**

Greg Yates is a speaker, author, adviser, consultant, and coach working with high-level lawyers and other professionals. He assists those professionals in revitalizing their careers. His work ranges from minor career tweaks and adjustments to major career transitions.

Previously, Greg was an equity partner at two of the largest law firms in the country. He opened the New York office for one of those firms.

In his legal career, Greg built a practice of over \$3.5 million a year. He represented several of the largest international banks and a diverse variety of other clients. His practice centered on corporate restructurings, turnarounds, and workouts.

In 2011, the Turnaround Management Association presented Greg with its annual award for the Large Company Turnaround of the Year.

Earlier in his legal career, Greg was in-house counsel for a publicly traded investment firm, a lawyer at a boutique law firm representing the legendary New York real estate investor Harry Helmsley, and a law clerk for two federal judges.

Greg also worked in a non-legal management position at a Fortune 100 company and several small businesses.

Greg has four graduate degrees.