

[your firm learning logo]

In partnership, with



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“Leadership and learning are indispensable to each other.” – John Fitzgerald Kennedy

## In the words of Past Participants

*“The leadership program I completed was a pivotal experience for me; one that opened my eyes to the true themes and currents at play in the legal industry, as well as the essential emotional and intellectual features of lawyers as decision makers and actors in our industry. “*

*“The program was fantastic, both from the point of view of content, and in deepening relationships amongst the program participants. Course readings were thought provoking, and practical “hands on” segments were very effective in developing presentation skills and effectiveness in leading groups and decision making.”*

*“Your challenge was brutally high: to make this program compelling to all attendees. You met the challenge for me: I prepared for and keenly attended every session. Your readings also gave me insight into a new area of study: management. Am now subscribing to the HBR based on the window you provided through many of your recommended readings. “*

## Contents

Purpose of this Program.....	3
Approach .....	3
Audience.....	3
Ideal Group Size .....	3
Timeline .....	3
Methods .....	3
Leveraging previous Investments in Your Firm .....	3
Cost.....	4
Sample Program .....	5
Faculty .....	6
Karen MacKay.....	6
Andy Clark .....	7
Trevor Currie .....	7
To explore this program in your Firm.....	7

## Purpose of this Program

This program, customized to your firm, will help participants to:

- Develop essential skills for potential future leadership at your Firm
- Develop your effectiveness in leading diverse high performing teams
- Understand and develop your authentic executive presence
- Raise self-awareness, identify natural strengths and develop leadership style.
- Develop your own leadership style leveraging your unique strengths
- Develop wellness and resilience strategies essential to leadership success

This program will help your Firm to Build leadership *bench-strength* within the firm of skilled and knowledgeable candidates for succession of leadership roles in the firm.

## Approach

The program requires approximately two hours per month of preparation, and provides five group sessions and five hours of one-on-one coaching for each participant over the duration of the program. **Workshops** are scheduled bi-monthly with **individual coaching** in the alternate months. CPD credit will be earned as applicable. The program is designed with sufficient flexibility to adjust to the unique culture and strategic imperatives of the firm.

## Audience

The program is designed for high potential income and equity partners. Content is designed to meet the needs of partners who are experienced or future leaders and, ideally, currently or planning to be in a leadership role such as group leader or office management partner.

## Ideal Group Size

Ideally 15-18 participants

## Timeline

9 months.

## Methods

Methods are designed to increase retention, skill development and confidence.

- Assessments
- Presentation – introduction of new concepts
- Companion Materials are presented as TED talks, Book Summaries or Books depending on the topic and the depth participants wish to explore
- Facilitated Group Discussion – collaborative learning
- Coaching – one-on-one and in peer teams to meet the unique needs of individual participants

## Leveraging previous Investments in Your Firm

To *leverage previous investments made by your firm* we would work with you to incorporate them into this program as we customize it for you. For example, where your firm has invested in psychometric assessments (Myers Briggs, Hogan, Conflict Styles etc.) we can incorporate them into this program.

## Cost

This program is highly customizable to meet your goals and your budget. We will work with you to design a program and cost-structure as we work with you on design. Typical costs are approximately \$9500 per participant based on fifteen participants.

Costs attract applicable taxes, travel, meals and accommodation, cost of assessments, licensing fees for production of materials, cost of books.

Sample Program

 <b>Sample Program</b>	
Month One	<b>Module One – Building the Foundation</b> <b>Faculty: Karen MacKay, Phoenix Legal, Inc.</b> <ul style="list-style-type: none"> <li>• Leadership in the Law Firm Context</li> <li>• Current legal landscape, trends, realities</li> </ul>
Month Two	<b>Module Two – Raising Self Awareness and Playing to your Strengths</b> <b>Faculty: Karen MacKay</b> Personality, Style and Conflict. The diagnostics in context <ul style="list-style-type: none"> <li>• Identifying and leveraging your unique personality, style and strengths</li> <li>• Developing authenticity and versatility                             <ul style="list-style-type: none"> <li>▪ Earning Trust &amp; Political Capital</li> </ul> </li> </ul>
Month Three	Coaching
Month Four	<b>Module Three – Building Healthy Leaders, Lawyers &amp; Lives</b> <b>Faculty: Andy Clark, Wellness Lawyer &amp; Karen MacKay</b> The ability to manage stress, cope with change and to develop strategies to support resilience is a critical success factor for leadership. Working with faculty member Andy Clark, author of Lawyer Wellness is not an Oxymoron, participants will redesign strategies to support professional success and set an example of wellness and resilience in their groups and in the firm.
Month Five	Coaching
Month Six	<b>Module Four- Communication Skills</b> <b>Faculty: Trevor Currie, Podium Consulting</b> This intensive small group format is focused on developing executive presence through speaking with power, presence and persuasion
Month Seven	Coaching



**Sample Program**

<p>Month Eight</p>	<p><b>Module Five – Leading Diverse &amp; High Performing Teams</b>  <b>Faculty: Karen MacKay</b></p> <ul style="list-style-type: none"> <li>• Facilitation Skills</li> <li>• Gender Science &amp; Communications</li> <li>• Constellations of Influence</li> <li>• Dealing with Difficult Situations</li> </ul>
<p>Month Nine</p>	<p><b>Module Six – Applying the Learning</b>  <b>Faculty: Karen MacKay &amp; Trevor Currie</b></p> <p>The final module provides participants with the opportunity to apply the concepts, knowledge and experience to real situations in the Firm. Working in a short timeline the teams analyze and develop solutions, present to members of the Firm’s Leadership and handle Q &amp; A.</p> <p><b>Final Coaching Session</b></p>

**Faculty**

This program brings together a Faculty that is highly regarded throughout Canada and the United States. Together they bring training and coaching modules and techniques that have been successful in law firms for over a decade. Designed in collaboration with [your firm’s ] leadership, *this* is comprehensive, innovative and focused on the development and success of our Firm’s Future Leaders.

**Karen MacKay**

Karen MacKay is the program leader and executive coach for the participants. Karen has more than 25 years of professional services experience, an MBA from the Rotman School of



Management at the University of Toronto and is licensed in several tools and assessments. Today, she has a number of loyal and longstanding clients who have come to count on her for her law firm knowledge and integrity, as well as for her sensitivity and flexibility in the face of their ever-changing business priorities. In 2009, Karen was elected to become a fellow in the College of Law Practice Management.

With excellent communication, presentation, facilitation and coaching skills, Karen has a practice focused on professional service firms and the professional talent within them: leadership and strategy, governance and management through to succession planning and exit strategies.

Karen has published in legal publications in Canada, the United States, the United Kingdom, Europe and Australia. She is a member of the Practice Management section of the American Bar Association and is the author of “Taking the Lead,” a regular column in *Law Practice Magazine*, an ABA publication. Karen designed and delivered “Leaders’ Boot Camp,” which has been hosted in Canada, USA and Mexico.

#### Andy Clark



Andy Clark is the founder and CEO of Wellness Lawyer Inc., an organization that helps busy lawyers build legal careers that enhance, rather than erode, their overall quality of life and that of their loved ones. Andy believes passionately that lawyers can be healthy, happy and have successful practices but only if they learn to create a balanced, wellness lifestyle.

Before starting Wellness Lawyer in 2012, Andy practised law with Stewart McKelvey for 7 years. He also spent 4 years as vice-president, legal affairs at Canadian International Capital Inc. Andy was educated at Mount Allison University and the University of British Columbia. He is the author of the book, *Lawyer Wellness is NOT an Oxymoron*.

#### Trevor Currie

Trevor Currie is the founder of Podium Consulting. He has worked with CEOs, board chairs and business leaders to help them become extraordinary communicators and deliver memorable presentations—from the TED stage to the boardroom.



Trevor is the creator of The Podium Method™, a process that helps professionals prepare, frame, and deliver powerful presentations. He has coached renowned trial lawyers and executives around the globe, he speaks on the topic of communication at conferences (Professionally Speaking: Maximize Your Power and Minimize Resistance When

Speaking, Standing Out from the Crowd: Presenting to Impress, and Slides that Stick) and he’s been a regular guest on the Business News Network.

With his extensive professional experience, Trevor helps clients develop powerful, practical solutions to the communications challenges they face. He has worked with leaders across a wide variety of industries including financial services, management consulting, law, IT and advertising.

Trevor is a graduate of Western’s Ivey Business School.

To explore this program in your Firm

Please contact Karen MacKay at [kmackay@phoenix-legal.com](mailto:kmackay@phoenix-legal.com) or by calling 416.657.2997.