

18th SOLO & SMALL FIRM CONFERENCE



E V O L U T I O N



AGENDA





Register at
[store.lso.ca/
18thsolosmall](https://store.lso.ca/18thsolosmall)

AGENDA AT-A-GLANCE

8:00 - 9:00 Breakfast, Exhibitors and The InfoXchange

9:00 - 9:10 Welcome

9:10 - 10:05 Opening Plenary - Burnout: What It Is and What We Can Do About It

10:05 - 10:45 Break, Exhibitors, and The InfoXchange

CONCURRENT BREAKOUT SEMINARS AND WORKSHOPS

Registrants can watch/attend Seminar A & Seminar B. Workshops are in-person only.
All sessions will be available on-demand. Topics subject to change.

	SEMINAR A	SEMINAR B	WORKSHOP
10:45-11:45	Dealing with Sensitive Issues in the Workplace (1 h e)	The Evolution of Law-Niche Practice Areas	Automating Work Processes
11:45-11:50	<i>Session Change</i>		
11:50-12:50	A Focus on Legal Ethics for Solo/Small Firm Practices: Strategies to Manage Challenging Issues	Artificial Intelligence and ChatGPT	Ethical Persuasion: Storytelling and Selling
12:50-1:50	<i>Lunch (In-Person Attendees) Exhibitors and The InfoXchange</i>		
1:50-2:50	Marketing: How to Build Referrals and Your Reputation	Civility in a Time of Change	Do it Yourself- Canva
2:50-3:30	Break, Exhibitors, and The InfoXchange		
3:30-4:30	Closing Plenary - Evolution: What's Next		
4:30	End of Program		
4:30-6:00	Reception		

THANK YOU TO OUR SPONSORS!

PLATINUM

SILVER



e = Session contains EDI content.

Total CPD = 5 h Professionalism **P** + 1 h EDI Professionalism **e**

LSO CPD is an Accredited Provider of Professionalism Content.



Law Society of Ontario CPD

18th SOLO & SMALL FIRM CONFERENCE

EVOLUTION



JUNE 13

9:00 a.m. - 4:30 p.m.

LIVE IN TORONTO, Metro Toronto Convention Centre,
North Building, 255 Front Street West, Toronto
or **LIVE WEBCAST**

CO-CHAIRS



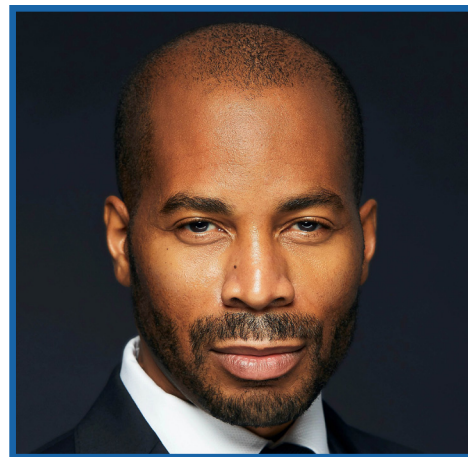
**The Honourable Justice
Kathleen Erin Cullin**
Superior Court of Justice



Barbara Hicks
*Hicks & Hicks
Professional Corporation*



Jennifer Reynolds
Fresh Legal



Andrew Leroy Rudder
Rudder Law Group

AGENDA

8:00 a.m. – 9:00 a.m. Breakfast, Exhibitors, and The InfoXchange (Room 105)

9:00 a.m. – 9:10 a.m. **Welcome** (Room 106)

Barbara Hicks, *Hicks & Hicks Professional Corporation*

Jennifer Reynolds, *Fresh Legal*

Andrew Leroy Rudder, *Rudder Law Group*

Do you have questions for the faculty? Speaking times include 10 minutes for Q & A. To submit questions for the faculty, scan the relevant QR code or use the link below:

Opening/Closing Plenary and Seminar A Questions



<https://bit.ly/4dcxNAO>

Seminar B Questions



<https://bit.ly/3UwIOou>

Workshop Questions



<https://bit.ly/3w9pxzV>

OPENING PLENARY: Room 106

9:10 a.m. – 10:05 a.m.

Burnout: What It Is and What We Can Do About It

Navigating the challenges of entrepreneurship as a sole or small law firm practitioner requires a unique set of skills. Our presenters help you identify specific stressors inherent to being a legal professional. Get strategies to minimize those stressors and learn how to use them to your advantage. Hear how to prevent burnout with a practical, science-based checklist that you can use whenever the pressures mount. This session equips you with tools you can implement in real-time to manage immediate stressors, as well as strategies that you can easily integrate into your workday to build resilience and bolster your health and productivity.

Maria Virginia Anzola, LL.M, INHC, RHC™, Consultant and Co-Founder, *The Flipside Plan Inc.*

Rosana Fernandez, MSc, INHC, RHC™, Consultant and Co-Founder, *The Flipside Plan Inc.*

10:05 a.m. – 10:45 a.m. Break, Exhibitors, and The InfoXchange (Room 105)

AGENDA

Please note:

- Registrants can attend or watch either Seminar A, or Seminar B.
- Workshops are in-person only, on a first-come, first-served basis. Space is limited.
- **All sessions and all workshops will be available on-demand post-program.**

CONCURRENT BREAKOUT SEMINARS AND WORKSHOPS

BREAKOUT ONE 10:45 a.m. - 11:45 a.m.

SEMINAR A: Room 106

Dealing with Sensitive Issues in the Workplace (1 h e)

Living in a global, diverse, and multicultural society has many benefits but also comes with its own set of challenges. Differences of opinions, beliefs, and customs can sometimes fuel disputes. Our speakers give you tools and strategies to help reconcile such disputes with sensitivity and tact, so that you can build (or continue to build) an inclusive workplace that empowers and retains diverse and talented staff.

Moderator: **Barbara Hicks**, *Hicks & Hicks Professional Corporation*

Panelists: **Rochele Padiachy**, Manager, Learning and Knowledge Solutions,
Canadian Centre for Diversity and Inclusion

Brittany Taylor, *Rudner Law*

OR

SEMINAR B: Room 107

The Evolution of Law – Niche Practice Areas

As law becomes more specialized, niche practice areas have continued to emerge. How do you identify and get into one of these emerging niche areas of practice? How do you approach these areas of practice if you don't have a mentor to show you the way? Our experienced speakers share their unique journeys into "niche" practices and provide you with their practical insights and tips to identify, begin, or enhance your own niche.

Moderator: **Andrew Leroy Rudder**, *Rudder Law Group*

Panelists: **Emily Lam**, *Emily Lam Law*

Kathryn McCulloch, *Dentons Canada LLP*

Diane Kennedy Squires, *Smith Valeriote Law Firm LLP*

OR

WORKSHOP: Room 1O4BCD (in-person only)

Automating Work Processes

How do you ensure that every potential matter is tracked – from client intake to the resolution of the file – with minimal effort on your part? In this interactive workshop, our speaker helps you uncover the secrets of automating client intake and lead follow-ups. Learn how to set up seamless and consistent client communications as well as personalized interactions so that you can build trust and loyalty while reducing your manual workload.

Michelle Weger, *Venture Creative Collective*

11:45 a.m. – 11:50 a.m. **Session Change**

THANK YOU TO OUR

PLATINUM SPONSOR



Custodius is dedicated to the long-term storage of wills. We partner with lawyers and law firms to offer their clients affordable, secure, and safe long-term storage of their physical original will with a searchable database that ensures the will is never lost.

Learn more at custodius.ca

AGENDA

BREAKOUT TWO 11:50 a.m. - 12:50 p.m.

SEMINAR A: Room 106

A Focus on Legal Ethics for Solo/Small Firm Practices: Strategies to Manage Challenging Issues

All legal professionals have professional and ethical obligations. As a sole or small firm practitioner, you may find yourself handling ethical issues without the benefit of guidance from more experienced colleagues and mentors. Our speakers provide you with a starting point and roadmap to understand common ethical issues that sole and small firm practitioners face. Get tools, tips, and resources to help you navigate those issues properly and grow your professional network of trusted colleagues, mentors, and other supports.

Moderator: **Barbara Hicks**, *Hicks & Hicks Professional Corporation*

Panelists: **Daniel Goldbloom**, *Goldbloom Law*
Ben Kates, *WeirFoulds LLP*
Janani Shanmuganathan, *Shanmuganathan Law*

OR

SEMINAR B: Room 107

Artificial Intelligence and ChatGPT

The future is now – are you ready for it? The evolution of technology and artificial intelligence in the legal profession continues to accelerate and the implications are far reaching. Our speakers provide practical information to help you understand what AI is, and how it can assist you to better leverage your work and serve your clients. They explore how to use these tools to market and brand your practice, assist in document review, and enhance your communications with others. By understanding what products are available, as well as the associated limitations and ethical issues, you leave this session with the skills you need to integrate these technologies into your practice.

Rachelle Laforge, *Things Change Legal Services*
Julie Sobowale, Freelance Journalist, *Canadian Bar Association*

OR

WORKSHOP: Room 104BCD (in-person only)

Ethical Persuasion: Storytelling and Selling

Communicating, negotiating, and persuading others are all critical skills that legal professionals use daily, no matter the practice area. Our speaker helps you to take these skills to the next level, teaching you how to clearly tell a story to ethically persuade your listeners. Learn how to reach consensus and reduce conflict in dealing with others in this interactive and dynamic workshop.

Marsha Shandur, Storytelling and Persuasive Communications Coach and Trainer, *Yes Yes Marsha*

12:50 p.m. – 1:50 p.m. **Lunch, Exhibitors and The InfoXchange (Room 105)**

EXHIBITORS

Everyone could use a helping hand. Stop by our Exhibitors (Room 105) to discover products and services that can take your practice to the next level!



affectit.ca



cosmolex.ca



custodius.ca



dyedurham.ca



e-stateplanner.com



goodfact.co



lawchambers.com



lawyerconveyance.ca



ldd.ca



lexisnexis.ca



lexo.ai



teranet.ca/industries/legal/



thomsonreuters.ca/en.html



titleplus.ca



virtualassociates.ca

BREAKOUT THREE 1:50 p.m. - 2:50 p.m.

SEMINAR A: Room 106

Marketing: How to Build Referrals and Your Reputation

Our speakers show you how to build an online presence by investing just one hour a week of your time. Get practical advice on developing online content, and creating a personal, attention-grabbing brand to make your practice stand out in an increasingly competitive landscape. Learn how to tap into existing networks to grow your referral base and enhance your reputation - all at no extra cost to you!

Tony Albrecht, *CONTENDER*

Andrew Leroy Rudder, *Rudder Law Group*

OR

SEMINAR B: Room 107

Civility in a Time of Change

Civility in the legal profession continues to be a hot topic. Post-pandemic, the ways we communicate have evolved as we increasingly rely on technology. This often leads to quick, “in the moment” responses. How can we safeguard against uncivil, knee-jerk reactions in this (digital) environment? What are the best ways to address issues when communications may cross the line into uncivil terrain? And how can you navigate uncivil communications when on the receiving end of them? Our expert panel explores these issues with an aim to give you practical guidance for your communications and interactions with other practitioners, clients, witnesses, the Court, and others.

The Honourable Justice Sheilagh O’Connell, Senior Advisory Family Justice, *Ontario Court of Justice*

Lisa Freeman, *Liva Freeman Dent LLP*

Elena Roizen, *Adesse Legal Services*

OR

WORKSHOP: Room 104BCD (in-person only)

Do it Yourself – Canva

Learn how to transform your solo or small firm practice by using Canva - a free online graphic design tool. In this hands-on workshop, our speaker provides you with practical tips and best practices on setting up an account and creating customized marketing and branding materials to help make your firm stand out. Don't miss this opportunity to learn how you can do-it-yourself.

Caitlin Spearing, Founder and Social Media Marketer, *OMG Social Media Agency*

AGENDA

2:50 p.m. – 3:30 p.m. Break, Exhibitors, and the InfoXchange (Room 105)



COMPLIMENTARY PROFESSIONAL HEADSHOTS

Make sure your first impression is a great one! Visit our on-site photographer to get your professional headshot today.

Registrants will receive an email to book an appointment, on a first-come, first-served basis. Didn't get an appointment? Visit the photographer's booth on program day for availability.



THE INFOXCHANGE

Have a question in mind? Look to the people at The InfoXchange for the answer! (Room 105)



CAN

Coach and Advisor Network

REP

Réseau d'encadrement de la pratique



**Homewood
Health**

LAWPRO[®]



LSO-Spot Audit



LSO-Practice Review



**Law Society
of Ontario**

**Barreau
de l'Ontario**

Great Library



**PRACTICE
MANAGEMENT
Helpline**

**Ligne d'aide
À LA GESTION
DE LA PRATIQUE**

CLOSING PLENARY: Room 106

3:30 p.m. – 4:30 p.m.

Evolution – What's Next

Discourse about the future of the legal profession has revolved around AI, remote work, virtual courts, and cyber security. But what does this look like in reality and in practice? Many legal professionals already have lived experiences relating to these topics. Three of them convene to share their experiences at this year's closing plenary. They provide you with real-world examples of how to (successfully) respond to a cyber security breach, embrace new and innovative technologies in their practice, and adopt a flexible remote work routine that allows safe work in other provinces and countries. Join us as we hear their stories and weave together the threads that will shape your future as a legal professional.

Moderator: **Barbara Hicks**, *Hicks & Hicks Professional Corporation*

Panelists: **Lisa Barazzutti**, *Barazzutti Strybos*
Yonida Koukio, *Oziel Law*
Andrew Leroy Rudder, *Rudder Law Group*

4:30 p.m. **End of Program**

4:30 p.m. – 6:00 p.m. **Reception** (pre-function space outside of 105/106)

Remarks:
Neha Chugh, *Bencher, Law Society of Ontario,*
Chugh Law Professional Corporation



SPONSORS

THANK YOU TO OUR PLATINUM SPONSOR!



Custodius is dedicated to the long-term storage of wills. We partner with lawyers and law firms to offer their clients affordable, secure, and safe long-term storage of their physical original will with a searchable database that ensures the will is never lost.

custodius.ca

THANK YOU TO OUR SILVER SPONSORS!



CosmoLex is the only fully integrated practice management solution built with the needs of modern small and mid-sized law firms in mind and is the exclusive legal practice management software for the Canadian Bar Association. Experience compliant and secure practice management, business and trust accounting, timekeeping, invoicing, payment processing, and legal CRM – accessible anytime, anywhere. Try CosmoLex for free at www.cosmolex.ca.

cosmolex.ca



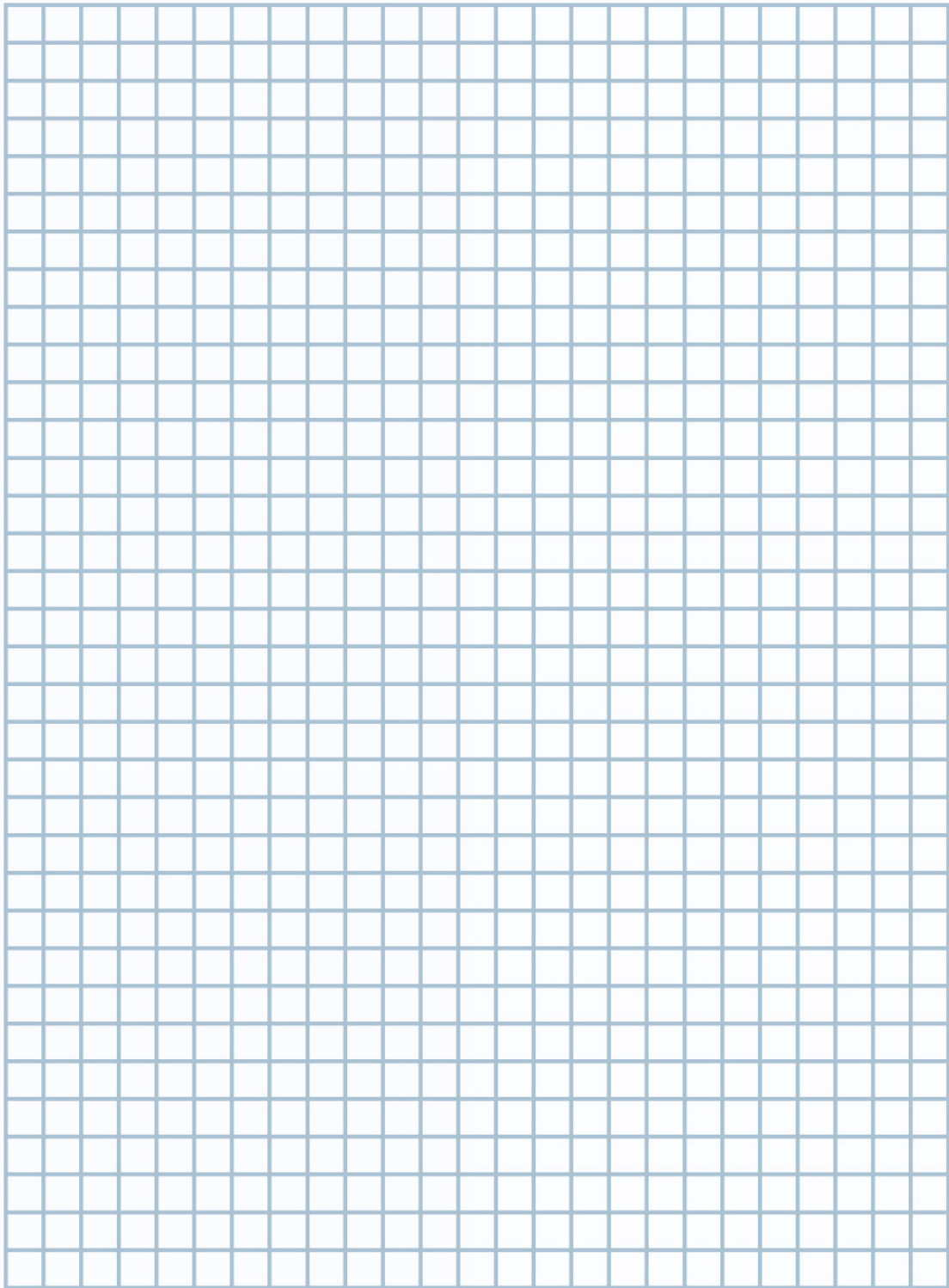
eState Planner, an award-winning software used by 1,000+ Canadian lawyers, streamlines the estate planning and will drafting process for lawyers and their clients. This cloud-based program helps lawyers save time on client intake, create detailed estate plans, enhance client's experience, and generate wills, powers of attorney, and other legal documents.

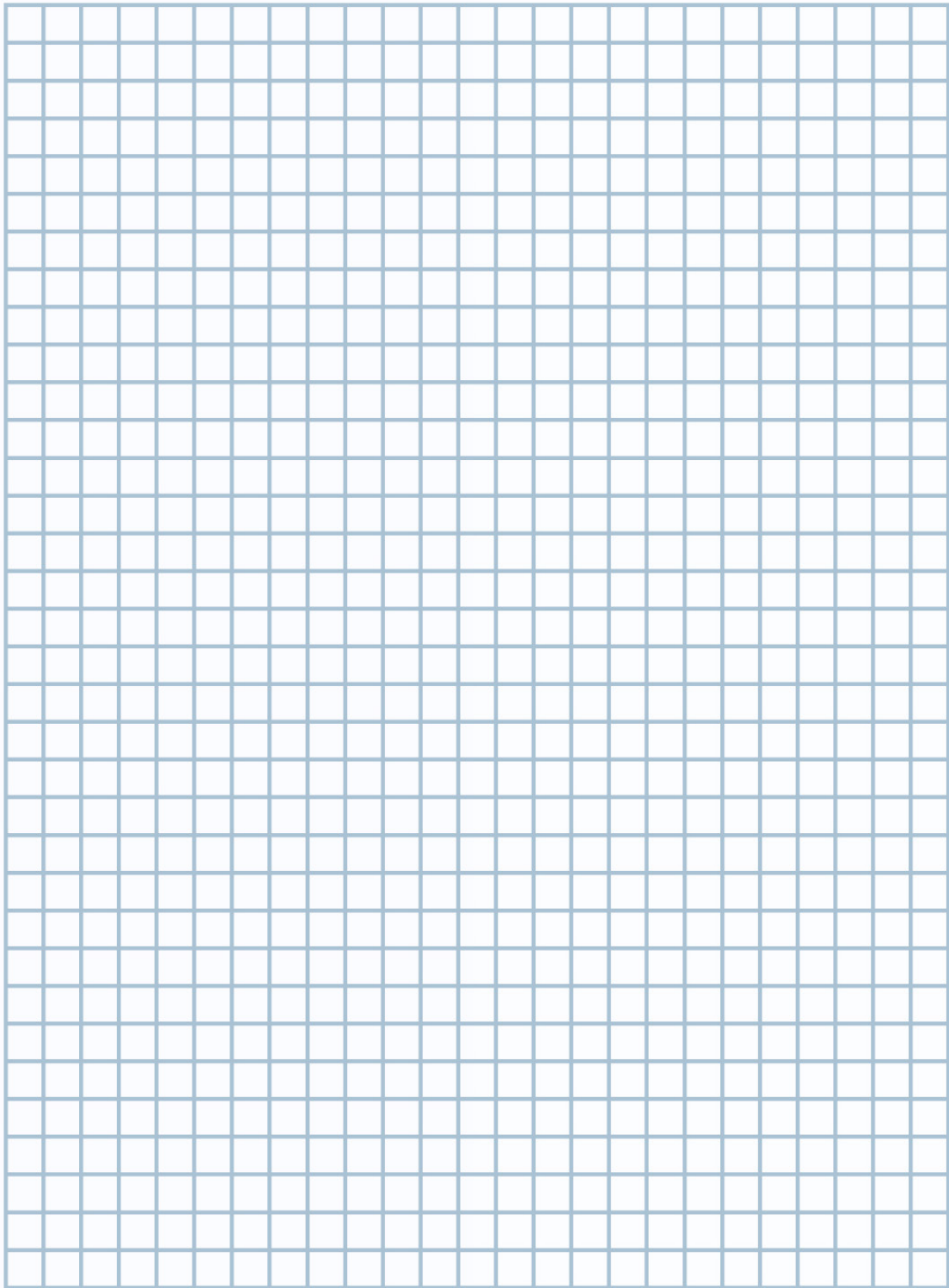
e-stateplanner.com



Talk2Me Technology Inc. is pleased to present, Philips SpeechLive, the simple and effective all in one dictation & speech recognition platform enabling law firms of all sizes to increase productivity through speech technology. Try SpeechLive for free at www.talk2me.com/contact-us

talk2me.com





Fall
2024

COMING
JULY 2024!

Your CPD.



From your legal community.