

# 15<sup>th</sup> Solo and Small Firm Conference: The Solo/Small Advantage



CO-CHAIRS: **The Honourable Kathleen Erin Cullin**  
*Superior Court of Justice*

**Barbara Hicks**  
*Hicks & Hicks Professional Corporation*

STEERING COMMITTEE: **Monica Goyal**  
*Caravel Law PC*

**Aaron Grinhaus**  
*Grinhaus Law Firm*

**Jennifer Reynolds**  
*Fresh Legal*

**June 10, 2021**  
**Live Webcast**  
**9:00 a.m. to 4:30 p.m.**

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**Networking Event**  
**4:40 p.m. to 6:00 p.m.**

**Law Society of Ontario**  
**SKU CLE21-00602**

## Agenda

**8:00 a.m. – 9:00 a.m.** Exhibitor Halls and The InfoXchange

**9:00 a.m. – 9:05 a.m.** **Welcome and Opening Remarks**

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

Barbara Hicks, *Hicks & Hicks Professional Corporation*

**Note: Included at the end of each session is 10 minutes for question and answer. Speaking time includes the 10 minutes of question and answer.**

**9:05 a.m. – 10:00 a.m.** **OPENING PLENARY: The Solo/Small Advantage**

Just as the world has changed significantly in the last year, so has the practice of law. For some, this transition was challenging – for others, the pandemic provided an opportunity to innovate and transform their practices. Our diverse panel of speakers take you through their own journeys - from starting out as a solo or in a small firm to managing their practice in today's rapidly changing environment. Each will present a unique story of resilience and commitment and how they leveraged their strengths to build a successful practice. From dealing with mental health and wellness issues to managing staff, building a business profile, expanding the firm and the many advantages of being a solo or small firm practitioner – the presenters cover it all. Hear how they have defined success today and how you can leverage their experiences to achieve it yourself in your legal services business.

Moderator: Joel Kadish, Barrister & Solicitor

Panelists: Hamoody Hassan, *Hassan Law*

Kimberly Whaley, C.S., TEP, *WEL Partners*

David Whitten, *Whitten & Lublin Professional Corporation*

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**10:00 a.m. - 10:30 a.m.** Break: Exhibitor Halls and The InfoXchange

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## CONCURRENT BREAKOUT SEMINARS

*Registrants watch either Seminar A or B*

Speaking time includes the 10 minutes of question and answer

### **Breakout One**

#### **Seminar A**

**10:30 a.m. – 11:20 a.m.      Start with the End in Mind: How Innovation Can Guide you to a Better Law Practice**

If you were to take a critical look at your practice, what are the tasks that you dislike the most? Maybe it's billing clients regularly or following up on unpaid accounts. Perhaps you are stuck on getting pertinent information from clients, responding to client requests for file updates, or monitoring staff on their work progress. Possibly, you just don't feel that you can move "ahead" of your to-do list and you are stuck doing the same, repetitive tasks each day. Where can you find solutions to these dilemmas? Our speaker gives you tips on how you can use technology to innovate routine processes and embrace your least-favourite tasks through the power of "habit" to make your practice more efficient.

Megan Cornell, Founder, CEO & Lawyer,  
*Momentum Business Law Professional Corporation*

**OR**

#### **Seminar B**

**10:30 a.m. – 11:20 a.m.      Being a Better Boss Through More Feedback and Effective Communication (Even in a Pandemic)**

Providing constructive feedback to your staff was challenging before the pandemic. Remote or semi-remote work arrangements often mean that now, effective feedback is either minimal or not given at all. Our dynamic panel helps you to understand how to create a workable communication system for all staff and why doing so can lead to better success in your practice. They explain different types of feedback and how best to prepare for and frame the conversation. They also share insight into the psychology of feedback and strategies to deal with defensive reactions. Learn practical tools on crafting effective feedback and using communication models that work for your solo or small firm.

Moderator:                      Monica Goyal, *Caravel Law PC*

Panelists:                        Deborah Glatter, *Deborah Glatter Consulting*

Paulette Nnorom, *Creative Choices for the 21<sup>st</sup> Century Lawyer Inc.*

Alexandra Overchuk, *Alexandra Overchuk Consulting*

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**11:20 a.m. – 11:25 a.m. – Session Change**

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## **Breakout Two**

### **Seminar A**

**11:25 a.m. – 12:15 p.m.      Planning for Absences from Your Practice**

At some point in your legal career, you may want or need to take time away from your practice. Whether for parental or mental health leave, illness or medical leave, or to be a caregiver for others, the need to step away from law can be expected (or unexpected). There are steps that you can – and should - take to prepare for this type of situation. Find out how you can use appropriate systems when the need for a leave arises. Hear about how you can reduce the risk and anxiety that may come with taking an extended leave from practice. Hear what our speakers have done to keep their practices going when they were faced with these challenges themselves.

Moderator:                      The Honourable Kathleen Erin Cullin,  
*Superior Court of Justice*

Panelists:                        Jennifer Mathers McHenry, *Mathers McHenry & Co.*  
  
   Kadey Schultz, *Schultz Frost LLP*

**OR**

### **Seminar B**

**11:25 a.m. – 12:15 p.m.      Tech Solutions and Challenges for Solo and Small Firms**

The increasing reliance on technology for all aspects of running your law practice has provided both opportunities and challenges for solo and small firm practitioners. Hear how to deal with threats, phishing scams, and the actions you need to take if you get hacked. Our speakers also cover topics you need to be aware of when working remotely, using the cloud, and navigating the new rules on dealing with documents. Learn what you should consider about the economies of implementing AI into your legal services, so that you can determine if it is relevant for your practice.

Mouna Hanna, *Dolden Wallace Folick LLP*

Phil Brown, Counsel, Practice Management,  
Practice Supports and Resources, *Law Society of Ontario*

Noah Waisberg, CEO and Co-Founder, *Kira Systems*

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**12:15 p.m. – 1:15 p.m.**

Lunch: Exhibitor Halls and The InfoXchange

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### **Breakout Three**

#### **Seminar A**

**1:15 p.m. – 2:05 p.m.**

**Generational Diversity at Work: What Does 2021 Look Like?**

**IMPORTANT NOTICE: Our permission to include this presentation and materials has expired and all related items have been removed.**

For the first time ever, there are four (soon to be five) generations working side by side in the legal field, each with their own perspectives, experiences, and attitudes. Working effectively across generations can be frustrating or exhilarating (or both). Building on the latest behavioural science, you learn how to leverage generational diversity in your workplace to enhance performance, increase productivity and maximize efficiency and promote greater understanding between you and your colleagues.

Nora Spinks, CEO, *The Vanier Institute of the Family*

**OR**

#### **Seminar B**

**1:15 p.m. – 2:05 p.m.**

**Time Management Hacks for the Busy Practitioner:  
Practical Tips to Get Stuff Done**

Do you find yourself at the end of the day wondering where your time has gone? Are you now working remotely at home where there are constant distractions or interruptions? Or, are you so busy you can't keep up, so you procrastinate about starting or completing tasks? You are not alone. In our new normal, the boundaries between your home and office have blurred and many lawyers find getting things done to be more difficult and stressful than ever. Get tips on how to manage your time so that you can meet your commitments.

Juda Strawczynski, Director, practicePRO,  
*Lawyers' Professional Indemnity Company (LawPRO®)*

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2:05 p.m. – 2:10 p.m. – Session Change

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## Breakout Four

### Seminar A

2:10 p.m. - 3:00 p.m.

### Preparing for a Law Society Audit

What can you do to prepare for a Law Society audit? We have the answers for you. The first thing to remember is “don’t panic”. Our presenters are an accountant experienced in advising legal practices and LSO auditors who give you the straight information - a full rundown on how to make sure that you are prepared and can learn from the experience. LSO spot auditors explain the audit process clearly, including *By-law 9* considerations, and how practice expectations have changed since COVID-19 began. Hear about common issues that arise and how to address them to ensure your next spot audit will go smoothly.

Moderator: Aaron Grinhaus, *Grinhaus Law Firm*

Panelists: Mayur Gadhia, CPA, CA, Founder  
*CloudAct CPA Professional Corporation*

Charley Kozdas, CPA, CGA, CFF, CFE, BAccS,  
Auditor, Spot Audit, *Law Society of Ontario*

Lisa Roper, CPA, CGA, Auditor, Spot Audit, *Law Society of Ontario*

OR

### Seminar B



Superior client service can be a key advantage in attracting and maintaining clients to your solo or small firm practice. How you interact with clients can help determine how successful your practice will be. Our presenter provides you with an understanding of approaches you can take to learn about the impact of culture on legal interactions, take steps to remove barriers and create trust, and to recognize that the learning process is ongoing for you and your staff.

Cynthia Pay, *Immigration and Refugee Board,*  
*Refugee Appeal Division*

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**3:00 p.m. – 3:30 p.m.**                      Break: Exhibitor Halls and The InfoXchange

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**3:30 p.m. – 4:30 p.m.**                      **CLOSING PLENARY: Where Do We Go from Here?  
Thriving Within a Rapidly Changing Legal Market**

Marketing and business development for lawyers has never been more important than it is now. While the legal market has evolved at an accelerated pace in recent years, the response to the pandemic showed us that change can happen quickly when circumstances require it. Solo and small firms have the advantage of being responsive, agile, and quick to adapt when their leaders – that’s you – know how to make that happen. Our presenter offers practical strategies and helpful tactics for you to define your market niche, distinguish your strengths from other firms, and develop a unique brand, all while keeping to a sensible budget. You can develop a flexible and doable marketing and business development plan to serve you and your targeted clientele well, for now and in the future.

Heather Suttie, Legal Marketing & Business Development  
Consultant, *HEATHER SUTTIE & ASSOCIATES*

**4:30 p.m.**    **End of Program**

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**4:30 p.m. – 4:40 p.m.**                      **Break**

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**4:40 p.m. – 6:00 p.m.**                      **Networking Event**

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