

17th Solo and Small Firm Conference: Secrets for Success



CO-CHAIRS:

The Honourable Justice Kathleen Erin Cullin
Superior Court of Justice

Barbara Hicks
Hicks & Hicks Professional Corporation

Jennifer Reynolds
Fresh Legal

June 8, 2023

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

Total CPD Hours = 4 h 30 m Professionalism  + 1 h 30 m EDI Professionalism 

**Metro Toronto Convention Centre
North Building
255 Front St. W.
Toronto, ON**

Live In-person and Webcast

SKU CLE23-00602

Agenda

8:00 a.m. – 9:00 a.m. Breakfast, Exhibitors and The InfoXchange

9:00 a.m. – 9:05 a.m. Welcome

The Honourable Justice Kathleen Erin Cullin
Superior Court of Justice

Barbara Hicks, *Hicks & Hicks Professional Corporation*

Jennifer Reynolds, *Fresh Legal*

Note: Included as part of each session is 10 minutes for question and answer.

9:05 a.m. – 10:00 a.m. OPENING PLENARY: The Secrets for Success

What does success look like to you? And what does it look like for your team? And your clients? Our distinguished speaker shares his insights on running the *business* of your law practice successfully so that you can meet your goals. He sets the stage for the conference by offering data-based information to help you make the right decisions for you and your firm. Hear how to design a client-centred law firm, improve your time utilization, create an anti-fragile and more resilient business, increase your competitive edge by using technology, and more.

Jack Newton, CEO & Founder, *Clio*

10:00 a.m. – 10:30 a.m. Break, Exhibitors and The InfoXchange

CONCURRENT BREAKOUT SEMINARS AND WORKSHOPS

Registrants attend or watch Seminar A, Seminar B, or a Workshop.
All sessions will be available on-demand post-program.

BREAKOUT ONE

Seminar A

10:30 a.m. – 11:20 a.m. Best Practices for Your Team (10 m )

If there is one consistent theme from the past three years, it is that the workplace has changed significantly, and perhaps forever. What does that mean for you? More than ever, engaging your staff can reap benefits for you as a business leader, through retention, job satisfaction, and a well-managed professional life. Learn about innovative approaches and new models to create a culture that reflects a firm's vision, as well as meeting employees' needs. Hear why it is essential to have clear employment contracts and solid workplace policies in place, understand how to offer benefits, rewards, and compensation structures that resonate with staff, and where work challenges can give you opportunity for reflection and positive change.

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

Panelists: James De Melo, *Construct Legal*

 Jonquille Pak, *JPak Employment Lawyers*

 Jonathan Richardson, *Richardson Hall LLP*

OR

Seminar B

10:30 a.m. – 11:20 a.m. Integrating Alternative Billing into Your Firm

Many of your peers may be shifting away from traditional billing practices- have you thought about it for your firm? Hear how and why you might consider moving from an hourly rate to an alternative billing model. Understand which practice areas alternative billing fits best for, what the process is to implement these systems, how to train and manage your staff, and how to manage your clients and their expectations under these alternative billing arrangements.

 Digby Leigh, *Digby Leigh & Co.*

 Allison Speigel, *Speigel Nichols Fox LLP*

OR

Workshop

10:30 a.m. – 11:20 a.m. The Modern Lawyer's Marketing Blueprint

How do you find your dream clients? Or, perhaps, more importantly, how do they find you? One of the challenges of solo or small firm practice is learning how to create your brand and how to build the relationships that help build your business. Our presenters started their

practices from the ground up and share their secrets on how to leverage technology, how to best invest your time (not just your money) in effective marketing techniques and offer solutions so that you can develop a blueprint for your firm's success.

Romesh Hettiarachchi, *Signal Lawyers / Lawtrepreneur*

Andrew Leroy Rudder, *Rudder Law Group*

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

BREAKOUT TWO

Seminar A

11:25 a.m. – 12:15 p.m. Successfully Implementing Changes in Your Firm

Change is hard. Navigating change when your staff, clients, and your network of related professionals are involved may be even harder. You need to ensure that the right processes are in place to make these transitions successful. Understand how to implement transformations in varied aspects of your practice, including introducing new technologies, onboarding new staff, reducing or altering your team's responsibilities, and more.

Sukhi Dhillon Alberga, *Bridging Legal Solutions Law Professional Corporation*

Amy Grubb, *Grubb Legal Consulting*

OR

Seminar B

11:25 a.m. – 12:15 p.m. Pride and Pronouns: Navigating Diversity (50 m 

How do you create a more inclusive environment for your clients and in your workplace? Our panel helps you to navigate by giving you a better understanding of concepts relating to the 2SLGBTQ+ community. Learn more about gender identity, what it means today, and become more aware of how to use gender neutral language appropriately.

Renée Fuchs, *Legal Aid Ontario*

Milena Soczka, *Legal Aid Ontario Duty Counsel Office*

OR

Workshop

11:25 a.m. – 12:15 p.m. Bring Your Own Device- Learn How to Use Microsoft 365 Tools and Outlook to Your Advantage

You likely already have the tools to make your workflow more efficient, but you might not be using them to their full potential. Bring your own device to this hands-on workshop where you learn how to use Microsoft Office 365, Outlook, and other software more effectively. Discover additional ways to unlock the secrets that will save you (and your team) time and assist you in serving your clients more effectively.

Paul Unger, Affinity Consulting Group

**12:15 p.m. – 1:15 p.m. Lunch (In-Person Attendees)
Exhibitors and The InfoXchange**

BREAKOUT THREE

Seminar A

1:15 p.m. – 2:05 p.m. The Four Day Work Week

For lawyers, a four-day work week may seem like an unattainable goal. How can you work four days and still be able to service your clients while succeeding financially? Hear how our speakers have taken steps to make this approach work well in their firms. They offer practical tips on the processes you need, the technology they rely on, and the efficiencies they have pursued to make this dream a reality.

Leena Yousefi, YLAW

OR

Seminar B

1:15 p.m. – 2:05 p.m. Yes, You Really do Belong- Managing the Imposter Syndrome in Your Life and Practice (30 m )

Do you ever feel that you are in over your head? Or fear that someone will find out that you are a fraud, and that you have no idea what to do next? In a profession that prizes perfection,

competitiveness, and reputation, many lawyers experience feelings of self-doubt throughout their careers, despite their accomplishments. Without the skills to cope, lawyers can experience mental health issues, burnout, or paralyzing anxiety. Our speakers share their personal stories on how to identify “imposter syndrome” and offer strategies to overcome these feelings.

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

Panelists: The Honourable Justice Lucille Shaw, *Superior Court of Justice*

Neha Chugh, *Chugh Law Professional Corporation*

Doron Gold, *Doron J. Gold, Psychotherapy and Wellness Education*

OR

Workshop

1:15 p.m. – 2:05 p.m.

Succession Planning for All Stages of Your Career

They say that failing to plan means planning to fail. This holds true for succession planning no matter what stage you are at in your career. If you don't have a proper plan for your practice for unexpected illness, accident, incapacity, or death it can mean negative consequences for your clients, your employees, and even your family. Our panel gives you tips to ensure you are prepared with the steps to take and the documentation you need. They cover how the LSO's Trustee Services get involved when a succession or contingency plan is not in place. Setting up your plan *now* helps safeguard your practice in the future.

Jordan Atin, C.S., TEP, *Atin Professional Corporation*

Kim Mackay, Trustee Services, *Law Society of Ontario*

Colleen Peffers, *PefferLaw*

Session Change
2:05 p.m. – 2:10 p.m.

BREAKOUT FOUR

Seminar A

2:10 p.m. – 3:00 p.m.

The Solo/Small Firm During Challenging Times

Solo and small firms are uniquely positioned to rapidly adapt to the changing landscape because they can quickly pivot when faced with external challenges and are always able to evolve in creative ways. Hear how our panel of speakers handle the stress of change in career path, the economic challenges of the pandemic, mental health obstacles, and the need for resilience to build a strong foundation for their firm.

Katharine Brack, Osprey Law LLP

Selwyn Hicks, Hicks & Hicks Professional Corporation

Jodie Primeau, Primeau Law Professional Corporation

OR

Seminar B

2:10 p.m. – 3:00 p.m.

Technology Update

The rapid changes in technology are daunting for anyone operating a solo or small firm. Understanding available technology and how - and when - to implement these new tools is critical to your firm to make you competitive. Hear about the risks and opportunities in using AI in your practice, learn about the importance of knowledge management tools, and be aware of the steps you can take to protect from cyber attacks.

Catherine Sanders Reach, Director, Center for Practice Management, North Carolina Bar Association

Paul Unger, Affinity Consulting Group

OR

Workshop

2:10 p.m. – 3:00 p.m.

Rebooting Your Client Intake Process

Onboarding new clients is an essential step in your firm's operations. You want to meet your professional obligations and mitigate risk while ensuring you have a process that works for your clients. In this workshop, our speakers provide valuable tips so you can build (or tweak) that process to identify gaps, introduce automation, and create a well-designed intake process that will serve you better.

Lisa Feldstein, *Lisa Feldstein Law Office Professional Corporation*

Jennifer Reynolds, *Fresh Legal*

3:00 p.m. – 3:30 p.m. **Break, Exhibitors and The InfoXchange**

3:30 p.m. – 4:30 p.m. **CLOSING PLENARY: Growth Stories of Successful Law Firms**

What does it mean to *grow your firm*? It might be adding staff or perhaps it is increasing the services you provide. Or maybe it's updating processes through tech or expanding the territory you cover. Hear tips and practical insights from speakers who have managed these changes, to see how you can grow your firm in the ways that work for you.

Moderator: Jennifer Reynolds, *Fresh Legal*

Panelists: Jennifer Gold, *Wood Gold LLP*

Cheryl Siran, *Hook Seller Lundin LLP*

Jacqueline Swaisland, *Landings LLP*

Darlene Tonelli, *Inter Alia Law*

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

4:30 p.m. – 6:00 p.m. **Reception and Treasurer's Remarks**

Jacqueline Horvat, Treasurer
Law Society of Ontario