



SOLO & SMALL
FIRM 2018

Solo and Small Firm Conference 2018

The 21st Century Lawyer

THURSDAY, JUNE 7, 2018 9:00 a.m. – 4:30 p.m.

Metro Toronto Convention Centre, South Building, 700 Level, 222 Bremner Blvd.
or LIVE WEBCAST

CHAIRS



Kathleen Erin Cullin, C.S.
Wallbridge, Wallbridge



Barbara Hicks
*Hicks & Hicks Professional
Corporation*



Allan Oziel
Oziel Law

Total CPD = 6 h Professionalism P (including 1 h EDI E)

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Law Society
of Ontario | Barreau
de l'Ontario

 Law Society of Ontario CPD

 @LSOCPD #SoloSmall18



8:00 a.m. – 9:00 a.m. **Continental Breakfast sponsored by MNP**
Exhibitors (Room 716), Ingenious Bar, and Networking

9:00 a.m. – 9:05 a.m. **Welcome and Opening Remarks**
Room 718
Kathleen Erin Cullin, C.S., *Wallbridge, Wallbridge*
Barbara Hicks, *Hicks & Hicks Professional Corporation*
Allan Oziel, *Oziel Law*

OPENING PLENARY

9:05 a.m. – 10:00 a.m.
Question and Answer: 9:50 a.m. – 10:00 a.m.
Room 718

Using Data to Deliver a Better Client Experience

It's the 21st century. Clients communicate differently, behave differently, and have different expectations of their service providers. If you don't embrace that, you'll be left behind. You need to consider how to deliver legal services to fit the changing times. Technology is a big part of that change. In our opening plenary, our speaker provides quantitative data on how consumers find lawyers, including what type of criteria they utilize to make their final selection. Learn how this information can create a better experience for your clients.

Jack Newton, CEO & Founder, *Clio*

10:00 a.m. – 10:30 a.m. **Coffee and Networking Break sponsored by TitlePLUS®**
Exhibitors (Room 716) and Ingenious Bar

EXHIBITORS

Our Exhibitors are happy to show you the products and services that can take your practice to the next level. Make sure you stop by.
(See Exhibitor list on page 9.)

CONCURRENT BREAKOUT SEMINARS

Live Webcast sponsored by LawyerLocate.ca

Registrants attend either Seminar A, B, C, or D at each time. Seminar D workshops are not webcast. Workshops are for in-person attendees only and require preregistration. Audio recordings of the workshops will be released after the program.

BREAKOUT ONE

SEMINAR: 10:30 a.m. – 11:20 a.m.

Question and Answer: 11:10 a.m. – 11:20 a.m.

SEMINAR A – Room 718

Enhancing Profitability while Increasing Access to Justice

Making legal services accessible is as important today as ever. However, the gap has widened between the provision of legal services and the ability to pay for those services. Where are the opportunities to bridge that gap? How can you provide those services and remain profitable? Our speaker has possible answers. Explore various practice models and hear solutions on how to deal with fees by offering service packages and limited scope retainers. Learn strategies to keep costs down by delegating, taking advantage of both human and technological resources that effectively manage the client's expectations and streamline the overall process.

Noel Semple, Assistant Professor, Faculty of Law, *University of Windsor*

OR

SEMINAR B – Room 714

The New Tax Rules and How They Impact You and Your Clients

Not only do the new tax rules affect your clients, they also affect you. As a solo or small firm practitioner, it is critical to understand how. Our speakers go over the recent changes in detail, including the tax on split income, taxation of professional work in progress, and the tax treatment of passive investment income. Learn which of these apply to you or your client and obtain tips on how to resolve any issues that arise.

Jesse Moore, CPA, CA, Tax Partner, *BDO Canada LLP*

Kurt Oelschlagel, FCPA, FCA, TEP, Tax Partner, *BDO Canada LLP*

OR

SEMINAR C – Room 717

A Guide to Working with Other Professionals and Expert Witnesses

You can't do it all yourself. These days, you often need to consult, collaborate, or retain professionals for their expertise on specific matters, regardless of your practice area. How do you optimize the value these professionals provide? You must take steps to define the scope of their instructions and the work they will perform. Hear how to appropriately manage expectations, define the boundaries of the relationship, prepare your expert for hearings, deal with experts of the opposing party, and more.

Corey Bloom, CPA, CA, CA-IFA, CFE, CFF, Partner, Forensics & Disputes – Eastern Canada Lead, *MNP*

Blair Bowen, *Fogler Rubinoff LLP*

Jennifer Hunter, *Lerners LLP*

OR >

SEMINAR D – Room 715B

Workshops are for in-person attendees only and require preregistration.

Building Your Professional and Personal Brand on LinkedIn

LinkedIn is one of the most popular social networking sites in the world. Most lawyers do not take full advantage of it. Does that include you? Who better to set you on the right track than a LinkedIn representative! Our workshop leader provides tips and offers practical solutions to make sure that you're attracting the right people to your profile. Don't miss this unique opportunity to enhance your brand and expand your connections.

Perry Monaco, Head of Customer Success Canada, *LinkedIn*

(11:20 a.m. – 11:25 a.m. Room Change)

BREAKOUT TWO

SEMINAR: 11:25 a.m. – 12:15 p.m.

Question and Answer: 12:05 p.m. – 12:15 p.m.

SEMINAR A – ROOM 718

Scaling Your Practice: Make More Money with Better Technology and Processes

To make more money, you have to expand your practice; to expand your practice, you have to free up time to develop your client base and work on your clients' files. How? You do more with less. This can mean adopting new technology or optimizing processes. Our speaker is the perfect person to get you started. Over the last few years, she's tested, adopted, and rejected many technology platforms, and she shares her experiences to help you zero in on the most efficient ones for you. She also explains the importance of optimizing processes and some of the tools and tricks to get more out of your solo or small firm practice.

Megan Cornell, *Momentum Business Law Professional Corporation*

OR

SEMINAR B – ROOM 714

A "Small" Model: How to Build a Practice That Fits Your Life

Your job is a big part of who you are. But if you were truly honest with yourself—about the kind of practice you want to build, the clients you enjoy working for, and the life you want to live—would you be prepared for your answers? That level of honesty is just the first step. Explore how this approach can help develop a personal framework for lawyers to find great clients, build a successful referral network, grow and shape a viable practice, and live an enriched life.

Neil Mangan, Founder, *Small Law Corporation*

OR >

SEMINAR C – ROOM 717

Disability and Accommodation Issues in Your Practice (10 m e)

Every employer must ensure that their work environment accommodates people with disabilities. As a lawyer, the *Rules of Professional Conduct* make it clear by defining your ethical obligations. Our presenters make sure you understand how to identify and appropriately deal with clients, staff, and others in accordance with the *Rules* and other legislation. They also give you strategies and review best practices to help you handle a file and manage your workplace, as well as provide insights into disability law as a growing practice area.

Kelley Bryan, *Perez Bryan Procope LLP*

OR

SEMINAR D – Room 715B

Workshops are for in-person attendees only and require preregistration.

Using Storytelling Techniques to Be More Memorable

As a lawyer, it's your job to convey information and facts in a clear and concise manner. But clarity alone doesn't guarantee something will be remembered. How do you frame the facts with a story that's both engaging and memorable? This workshop goes over the simple tools you can use to make your stories come alive and resonate with any audience. Hear how to capture the imagination of your listeners and ensure that your presentations are unforgettable.

Christopher Graham, Founder, *TellPeople*

12:15 p.m. – 1:15 p.m.

Lunch sponsored by Thomson Reuters

Exhibitors (Room 716), Ingenious Bar, and Networking

INGENIOUS BAR

For everything you wanted to know but were afraid to ask, turn to our Ingenious Bar. This year's representatives are from Coach and Advisor Network (CAN), Equity Initiatives, Homewood Health, Lawyers' Professional Indemnity Company (LAWPRO®), Law Society Referral Service, Practice Management Helpline (PMH), Practice Review Department, Law Practice Program (LPP) | Ryerson University, Spot Audit, The Action Group on Access to Justice (TAG) and TitlePLUS®.

BREAKOUT THREE

SEMINAR: 1:15 p.m. – 2:05 p.m.

Question and Answer: 1:55 p.m. – 2:05 p.m.

SEMINAR A – ROOM 718

Running Your Law Practice as a Business

A solo and small firm lawyer is constantly reminded that they're in the business of delivering legal services. You're a lawyer *and* a businessperson. You need to make decisions for your practice that require solid business acumen, and our speakers can help cover any gaps in your skillset. They go over the essential elements of a successfully run business: budgeting within a long-term plan, understanding workflow and resources, and harnessing the power of outsourcing, among others. Also, you learn how to analyze key performance indicators to keep your practice—your business—on track.

Vince Saroli, National Director—Segments, Small Professional Firms and Academic, *Thomson Reuters*

Allan Oziel, *Oziel Law*

OR

SEMINAR B – ROOM 714

Cherry-Picking: Using Client Personas to Target the Right Audience

Effective marketing is built on developing a thorough understanding of your client base's position, goals, and challenges. What firm attributes do your typical clients look for? Where and how are they most likely to connect with you? What website content do they search for, and what calls to action are effective? Learn how to build detailed client personas that will help you create content and identify tactics to encourage engagement with your firm and ultimately produce new files.

Marni MacLeod, Vice President, *Skunkworks Creative Group Inc.*

OR

SEMINAR C – ROOM 717

Office Policies for the Modern Work Environment: Strategies and Obligations

No matter what the size of your firm, it is critical to have policies in place to address issues that may arise in your workplace environment—both for today and its evolution in the future. Our speakers go over the range of policies and provide guidance on what is required, what is recommended, and what you should consider when developing policies for your law practice. You also receive tips on how they can be implemented.

Emma Phillips, *Goldblatt Partners LLP*

Stuart Rudner, *Rudner Law*

OR >

SEMINAR D – Room 715B

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Effective Negotiation Principles and Strategies

Lawyers negotiate; it's what they do, regardless of the area of law. The stronger the negotiation skills you have and strategies you know, the more confident you'll be. This interactive workshop teaches you how to negotiate under the dispute resolution paradigm and explores the different components that affect your strategy so you can promote robust solutions that meet your professional and ethical obligations.

Shannon Moldaver, *Shannon Moldaver Dispute Resolution Inc.*

(2:05 p.m. – 2:10 p.m. Room Change)

BREAKOUT FOUR

SEMINAR: 2:10 p.m. – 3:00 p.m.

Question and Answer: 2:50 p.m. – 3:00 p.m.

SEMINAR A – ROOM 718

Bionic Lawyers: The Nuts and Bolts of Digitizing Your Practice

To promptly and seamlessly adopt new technology, you need to have the right culture in place. You need a change-management strategy and a clearly defined budget. Does your firm have these? Can you identify which tasks are good candidates to be eliminated and the added functionality you'll need to replace them? Our speaker gets you started on streamlining your practice. Learn how to research and integrate appropriate and cost-efficient software to bring your practice into the 21st century.

Adrian Camara, Chief Executive Officer, *Athennian*

OR

SEMINAR B – ROOM 714

If It's Broken, Fix It: Alternative Billing Models

The billable hour is synonymous with the legal profession. It won't go away anytime soon. But that doesn't mean you have to use it for everything! Alternate billing models are already commonplace in some practice areas and are a growing trend in others. They have the advantage of providing certainty for both client and firm while streamlining office administration. Our speaker takes you through the steps and provides practical tools for implementing these models into your practice, including how to identify appropriate files, what to consider when determining fees, and how to manage your client's expectations.

Jennifer Reynolds, *Fresh Legal*

OR >

SEMINAR C – ROOM 717

Ten Ethical Issues That Affect Solo and Small Firms and How to Deal with Them

If you're unsure how to identify an ethical issue, or don't have the tools to effectively deal with it, you're playing a risky game. It can only cost you money, time, and stress later on. It's critical to get a jump on any ethical issues. Learn how to identify and effectively manage ten of the most common ones, including those in the area of joint retainers, conflicts of interest, and confidentiality and privilege. Your confidence will increase the more you understand how to successfully handle these challenging situations.

Brooke MacKenzie, *MacKenzie Barristers Professional Corporation*

OR

SEMINAR D – Room 715B

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Growing Your Practice through Equity and Inclusion (50 m)

The principles of equity and inclusion are powerful. By advancing them in your practice, you'll build a solid foundation with ample opportunity for growth. Our workshop leaders emphasize the importance of diversity and how it can enhance your client base, your profile, and increase opportunities in the marketplace.

Rinku Deswal, *RD Law Professional Corporation – Barristers & Solicitors*

Marian MacGregor, Equity Advisor, Equity Initiatives, *Law Society of Ontario*

3:00 p.m. – 3:30 p.m.

Coffee and Networking Break sponsored by TitlePLUS®
Exhibitors (Room 716) and Ingenious Bar

GET A COMPLIMENTARY PROFESSIONAL HEADSHOT!

It's an online world, and everyone needs a good-quality headshot.

We have a professional photographer on-site this year. Give him 10 minutes of your time, and he'll have you looking your best.

Sign-up required, so act fast!
Space is limited.

CLOSING PLENARY

3:30 p.m. – 4:30 p.m.

Question and Answer: 4:20 p.m. – 4:30 p.m.

Room 718

Becoming a Blockchain Lawyer

You've heard of blockchain as the latest technological innovation that could transform the way we conduct our everyday lives. Is it true? Blockchain is a revolutionary technology that encompasses a massive shared network onto which applications can be built and added. What does that mean for solo and small firm lawyers? Efficiency and productivity. From contracts and management of land registry systems to data control and communication, blockchain can make these processes easier. Find out how to utilize the existing efficiencies in your own practice and discover the opportunities available to lawyers who adopt this technology today.

Aaron Grinhaus, Lawyer and Blockchain Consultant, *Grinhaus Law Firm*

Allan Oziel, *Oziel Law*

4:30 p.m.

End of Program

4:30 p.m. – 6:00 p.m.

Cocktail Reception

Foyer

EXHIBITORS



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