

May 9, 2022

16th Solo and Small Firm Conference - The Future of Solo/Small Firm Law: Resiliency in a Time of Change



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

Barbara Hicks
Hicks & Hicks Professional Corporation

Jennifer Reynolds
Fresh Legal

June 23, 2022

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

Total CPD Hours = 6 h Professionalism ^P

Law Society of Ontario

Webcast Only

SKU CLE22-00606

Agenda

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 Future of Law: Resilience and Change - Where Do We Go from Here?

The past two years have been challenging for the legal professions as the pandemic set in motion sweeping changes to the legal landscape. You faced significant decisions affecting your personal and professional lives that required agility and resilience to quickly adapt. So, what is next for you and your practice? Our panel of speakers address the lessons learned and what the future holds for solo and small firms as everyone transitions to a post-pandemic world.

Moderator:

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

Panelists:

David Corbett, Deputy Attorney General,
Ministry of the Attorney General

Teresa Donnelly, Treasurer, *Law Society of Ontario*

William Woodward, Past President, *Federation of Ontario Law Associations (FOLA), Dyer Brown LLP*

10:00 a.m. – 10:15 a.m.

Break

CONCURRENT BREAKOUT SEMINARS

Registrants watch either Seminar A or B

All sessions will be available on-demand post-program

Speaking time includes the 10 minutes of question and answer

Breakout One

Seminar A

10:15 a.m. – 11:10 a.m.

**Launching Your Practice: Creating the Firm You Want
(from the Ground Up)**

You may be thinking that this is the time to strike out on your own. Or perhaps you are already in practice and you want to ensure that your goals become the reality of your professional life. In this session, our experienced speakers provide the information you need to successfully create the practice you want. Find out what factors you should consider before opening your practice; learn how to identify the areas that need your time and attention, how to generate more revenue opportunities and discover how to expand your client base.

Neha Chugh, Chugh Law Professional Corporation

Erin Durant, Durant Barristers

OR

Seminar B

10:15 a.m. – 11:10 a.m.

**Relaunching Your Practice: Transforming the Firm You
Have into the Firm You Want**

One of the (only) upsides of a worldwide event is that gives each of us a unique opportunity to consider or reconsider our professional future. Is change something that you want (or need) to accomplish for your work? Some of these changes may address your practice area focus, business structure, location, technology, or marketing. Our speakers have been through this journey in their professional lives and offer key insights and valuable strategies on how to successfully relaunch your practice.

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

Panelists: *Michele Allinotte, Journey Law Professional Corporation*

Carina Lentsch, ACL LAW

Session Change
11:10 a.m. – 11:20 a.m.

Breakout Two

Seminar A

11:20 a.m. – 12:15 p.m. Taking on a Practice: Deciding What is Right for You

How do you know when the potential firm that you want to buy may (or may not) be the right fit for you? If you are considering whether you should buy an existing practice, then this session is for you. Learn what information and records to review when you buy a practice, how to manage during the transition period, and get insights on dealing with differences in firm culture when you merge firms. Learn from our speakers who have successfully navigated the purchase of an existing practice and integrated it with their own firm.

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

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

 Martha Sullivan, *Sullivan Law Professional Corporation*

OR

Seminar B

11:20 a.m. – 12:15 p.m. Planning for Your Firm’s Future and Your Own: Transitioning or Selling

What can you do when you decide that your law practice is not for you anymore? Or when you want to wind down your practice but are unsure how to plan an exit. What are your next steps? Whether you contemplate a mid career change or decide to retire and want a succession plan that reflects that your vision for the future, do not miss this session. Hear what you should consider and who you should talk to when you want to merge or sell your solo/small firm practice and achieve your goals.

Moderator: Jennifer Reynolds, *Fresh Legal*

Panelists: Megan Cornell, *Gowling WLG (Canada) LLP*

Kathleen Geiger, *Geiger Legal Recruitment and Practice Sales*

David Goldberg, *Goldberg, Lamba & Ghannoum LLP*

12:15 p.m. – 1:15 p.m. Lunch

Breakout Three

Seminar A

1:15 p.m. – 2:10 p.m. How to Do the Right Thing: Ethics for Solo/Small Firms

A solo or small firm practitioner can confront ethical questions in any area of practice. Do you know how to handle these challenges smartly and quickly, so they do not escalate? Hear about the risks for anti-money laundering and fraud, learn effective lawyering techniques when there are both ethical and legal risks present in a file, and understand how to apply these strategies in your everyday practice.

Amee Sandhu, CEO | Founder, *Lex Integra Professional Corporation*

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

OR

Seminar B

1:15 p.m. – 2:10 p.m. Delegate Effectively Without a Big Team (or Budget)

Much of your workday is probably spent on non-billable work. Studies on sole/small practitioners bear out this trend. Some tasks can be done by others but how do you delegate without a large support team or excess funds to outsource work? Our speaker provides a framework to make those changes, helping you identify and allocate tasks you cannot bill for and utilize delegation tools you likely already have available in your practice. Learn how you can use process improvements so you can focus on issues that need legal your expertise while being able to serve your clients efficiently and effectively.

Karen Dunn Skinner, CEO, *Gimbal Canada Inc.*

Session Change
2:10 p.m. – 2:20 p.m.

Breakout Four

Seminar A

2:20 p.m. – 3:15 p.m.

Setting and Reaching Marketing Goals

Who needs a marketing plan, right? You. You need one. Without a realistic plan as a guide for key marketing steps, you can spend a lot of your time and money on marketing that does not get your practice where you want it to be. Hear valuable insights and tips on how to deal with the new realities of the legal market (including the ability of clients to retain a lawyer from anywhere in Ontario), how to be effective in your marketing, how to choose from the number of marketing tools and options, and when to take next steps to advance your professional presence online and in social media.

Elizabeth Kabesh, *Danielson Kabesh Law Professional Corporation*

Lara Wellman, Business Coach and Founder, *The Biz Studio*

OR

Seminar B

2:20 p.m. – 3:15 p.m.

Technology and Innovation: Challenges and Opportunities

In today's legal marketplace, how do you leverage your advantage as a solo or small firm to quickly modify your practice or adopt new technologies while still ensuring compliance with the *Rules of Professional Conduct*? As more solo and small firms are embracing portable practices and new systems, protecting, and securing data is critical. Hear about the enormous opportunities that are available to implement cutting-edge and innovative technologies to help you achieve a more manageable and efficient practice as well as what you need to do to ensure that you are keeping your practice property and client information safe and secure.

Chris Bentley, Managing Director, Legal Innovation Zone and Law Practice Program (LPP), *Toronto Metropolitan University*

Joel Brenner, *Brenner Law Professional Corporation*

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

3:15 p.m. – 3:30 p.m. **Break**

3:30 p.m. – 4:30 p.m. **CLOSING PLENARY: 11 Habits of Highly Successful
Solo/Small Firms**

What are the keys to being a successful solo or small law firm? Identifying and implementing certain behaviours in your everyday practice can lead to a more satisfying and productive work life. Our speakers take you through the information offered throughout the day and provide the how to; the actions you can take, the tools you need, and the strategies to apply to build and maintain a thriving practice. From exceptional client service, to getting paid for the work you do, to ensuring that you and your staff have processes that are compliant with the *Rules*, you can build a practice that meets your goals and brings you the professional career you are looking for.

Ramsey Cabbani, Vice-President Sales: Head of Sales LEAP
Canada: *LEAP Legal Software*

Misti Holmes, General Manager – Canada, *PCLaw/Time
Matters*

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