



CBA Solutions Series for Students (Part 1)

Find Clients: Business Development for Lawyers

Lawyers need an entrepreneurial mindset to find clients in today's competitive legal environment, but many lack training in business development. Do you need tips on how to develop or grow your client base and build your practice?

This session will walk you through different strategies and approaches to business development, including how to make foundational decisions about whether you want to attract or pursue clients, and how to develop your profile and your relationships.

Expert speakers will share tips for identifying and capitalizing on opportunities that are unique to your goals and objectives in order to build a successful and sustainable book of business.

Topics will include:

- Attracting new business: setting yourself up so they come to you
- Targeted prospecting: picking, prioritizing, and going to get 'em
- Attracting new business vs targeted prospecting
 - Pros and cons of each approach
 - Marrying the two approaches
- Practical tips, tricks, and how to's

Presenters:

Jane Southren, Principal, Jane Southren Consulting, Toronto

Jodi Kovitz, Director, Client and Business Development, Osler, Hoskin & Harcourt LLP, Toronto

Defend Your Data: Protecting Client Confidentiality in a Digital World

Many law firms have experienced cyberattacks and breaches. They are specifically targeted because they have confidential information, large sums of money in their trust accounts, and a reputation for weaker security of their information systems.

This session will highlight key considerations from the CBA's Legal Ethics in a Digital World technology guidelines and provide practical tips on the information security practices that lawyers should follow to protect their clients, themselves, and their information systems and devices.

The speakers will help you answer the following questions:

- Are your physical, organizational, and technological security measures adequate?
- Do you ensure that your clients are informed of, and accept, the risks associated with communicating by email and using the cloud?
- When is it appropriate to store client or firm data on the cloud, and how do you do it properly to protect client confidentiality?
- Do you know when to consider using encryption?
- Is your staff sufficiently trained to use technology safely?
- Do you have processes and systems in place to prevent or stop bad cheque frauds, phishing, and other online scams?
- Do you take adequate security measures and have a policy regarding the use of portable devices and other technology in your office?
- Have you taken adequate steps to guard against the inadvertent disclosure of metadata?
- Do you take all necessary steps to ensure that former employees can no longer access firm data?
- Is your data backed-up and does your firm have in place an incident response plan?

- When discarding equipment, do you take appropriate measures to guard against unauthorized disclosure of client information?

Presenters:

Dan Pinnington, Vice President, Claims Prevention & Stakeholder Relations, LAWPRO, Toronto

Marie-Claude Rigaud, Assistant Professor & Associate Dean of External Affairs and Communications, Faculty of Law, Université de Montréal

Nicolas Vermeys, Professor & Associate Director of the Cyberjustice Laboratory, Faculty of Law, Université de Montréal

Keep Clients Loyal: Position Yourself as a Trusted Advisor

The success of a law firm depends on a strong base of loyal clients, but many firms miss out on valuable opportunities to understand client needs. Are you looking for tools to improve your client relations and ensure that your best clients remain a source of work, referrals, and stability for your practice?

This session will explore methods for soliciting client feedback and responding with tailored services so you can foster a rewarding long-term relationship that is mutually beneficial.

Topics include:

- Client feedback: face-to-face interviews, client surveys, and focus groups
- The little (big) things: setting expectations, pro-active communication, and follow-through on commitments
- Understanding your client's business and industry
- Succession planning and client transition
- Client relations: stories and solutions from the front line
- Delivering value on and off the clock: value for money, seminars, community engagement, and business introductions

Presenters:

Sandra Goodwin, Managing Director, Client Development and Service, McInnes Cooper, Halifax

Mark Howe, Director of Client Relations, Thompson Dorfman Sweatman LLP, Winnipeg

Communicate with Confidence: Voice and Body Language Techniques for Lawyers

Words are the tools of the legal trade but they account for a very small portion of an overall message. Although the overwhelming percentage of human communication is nonverbal, many lawyers do not receive training in this area. Would you like to hone the effectiveness of your body language, tone of voice, and inflection?

This session will provide tips for improving the vocal and non-verbal aspects of your personal communication style when giving a presentation, negotiating in the boardroom or making your case in court.

Topics include:

- "Performance skills" of advocacy that make you an engaging speaker, including strategies for:
 - dealing with stage fright and boosting confidence;
 - harnessing your vocal power;
 - creating empowered and relaxed body language; and
 - keeping your audience engaged.
- "Rules" of improvisation for more effective communication, including strategies for:
 - thinking on your feet in the courtroom;
 - switching tracks in a client meeting; and
 - maintaining poise in difficult situations and presentations.

Presenters:

Katrina Dunn, Artistic Director, Touchstone Theatre and Touchstone Training, Vancouver

Bob Mann, Manager, Discipline and Appeals, Dalhousie University, Halifax

Boost Your Productivity I: Mastering Your Time

Technology is turning the legal marketplace into a 24/7 operation, and lawyers are increasingly faced with conflicting priorities and pressing deadlines. Given this reality, all lawyers could benefit from strategies to gain more control over their day.

This fast-paced session will provide you with a wealth of practical tips for maximizing your productivity in order to make an immediate and positive impact on your practice.

Topics include:

- How to deal with interruptions stemming from email, phone calls, etc. while remaining responsive and protecting critical focus time
- How to manage competing priorities and deadlines while maintaining a manageable pace of work
- How to handle a large volume of email, keep your inbox clear, and protect time for other top priorities
- How to manage the subtle pull of procrastination

Presenters:

Ann Gomez, Productivity Consultant and President, Clear Concepts Inc., Toronto

Paul Smith, Partner, Stewart McKelvey, Saint John

Boost Your Productivity II: Working Effectively with Support Staff

Effective delegation can help lawyers to maximize their productivity and get the most done each day, but many lawyers stand by the statement that “If I do it myself, it will get done right”. This approach is not sustainable in the long run and raises ethical concerns about charging lawyer rates for work that could be done by support staff.

Successful lawyers know that their productivity depends on leveraging the strengths of their full team of support staff. This session will provide tips on how you can most effectively work with administrative assistants, law clerks and other staff (including students and junior lawyers). The topics are informed by a survey of support staff at various law firms.

Topics will include:

- How to establish a daily planning and collaborative workshop relationship with your assistant
- How to address the most common delegating challenges
- Working as a team to prioritize and allocate work
- Building systems around focused work, deadlines, and organization
- Tales from the other side: what your support staff want you to know

Presenters:

Ann Gomez, Productivity Consultant and President, Clear Concept Inc., Toronto

Laura Williams, Founder and Principal, Williams HR Law Professional Corporation, Markham

Dealing with Difficult Clients: Practical Advice and Solutions

One of the key ingredients of a satisfying legal practice is the ability to deal with difficult clients, which requires both careful attention and proper planning. Do you have a challenging client and could benefit from advice on how to better manage the lawyer-client relationship?

This session will offer practical and proven strategies for managing your interactions with various types of difficult clients. Experienced practitioners will offer specific guidance for meeting various challenges that can arise during the course of the lawyer-client relationship.

Topics include:

- Negotiating the terms of the retainer
- Recognizing specific types of difficult clients and strategies for dealing with them
- Creating and maintaining proper boundaries in the lawyer-client relationship
- The deleterious effects of the difficult client on the lawyer
- When and how to end the relationship with a difficult client

Presenters:

Brian J. Burke, Epstein Cole LLP, Toronto

Breese Davies, Breese Davies Law, Toronto

Getting Paid: Effective Billing and Fee Collection Strategies

Timely fee collection is key to a law firm's financial performance, but many firms have not implemented effective billing practices. Do you need tips on how to manage collection issues before they become major problems for you and your firm?

This session will walk you through key strategies for getting paid throughout the lawyer-client relationship and the legal remedies that are at your disposal in the event of non-payment.

Topics include:

- Ethical considerations relating to fees, billing, and collections
- Effective billing practices – retainer agreements, managing expectations, and creating bills that clients want to pay
- How to talk to your clients about fees
- Creating effective systems and procedures for collecting outstanding accounts
- Overlooked remedies that may assist you in obtaining payment without litigation
- The nuts and bolts of obtaining and enforcing judgment for your proper charges

Presenters:

Bjorn Christianson, Managing Partner, Thompson Dorfman Sweatman LLP, Portage la Prairie

Greg T. Palm, Partner, Hamilton Duncan Armstrong + Stewart Law Corporation, Surrey