



# PROGRAM

Sole Practitioner and Small Practice Focus

27, 28 and 29 April 2017 | Law Society House, Brisbane

# Setting you up for success

A complete and comprehensive 3-day course to suit the needs of Queensland practitioners.

Designed by a team of experts, the course offers practical guidance on trust accounts, ethics and risk management. Course graduates further receive exclusive access to continued learning and support from QLS networking opportunities!

**Learn the business of law** – gain access to the experts on trust accounting, ethics and risk management and strengthen your legal and business skills.

**Focus on your priorities** – we encourage you to determine and focus on your practice priorities by guiding you through the steps to developing a business plan you can rely on.

**Superior learning experience** – our workshops are designed by a team of experts and tailored to accommodate varying practice sizes and structures, so you benefit from practical and relevant sessions that will set you up for success.

**Get ready to do business** – receive one-to-one support at Law Society House, over the phone, via Skype or at your practice and establish the structure of your legal business correctly from the start.

**Learn to manage people** – our leadership profiling will give you insight into your leadership style and will equip you with the tools you need to manage people (and clients), so you can build a successful legal practice.

**Ongoing bespoke support and commitment** – QLS is committed to supporting good law and good lawyers. We are dedicated to providing members with ongoing professional support after you graduate including access to our Practice Support Consultancy Service and Trust Account Consultancy.

## Upcoming workshop dates

### Sole practitioner and small practice focus

April 27, 28 and 29

June 1, 2 and 3

August 3, 4 and 5

October 19, 20 and 27

### Medium and large practice focus

July 13, 14 and 21

September 21, 22 and 23

## Location

Law Society House  
Level 2, 179 Ann Street  
Brisbane

## Contact

### Dr Rachel Baird

Manager, Learning and  
Professional Development

Find out more

 [qls.com.au/pmc](https://qls.com.au/pmc)

 [pmc@qls.com.au](mailto:pmc@qls.com.au)

 07 3842 5961

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Practical Legal Ethics 

Practice Management &  
Business Skills 

Professional Skills 



# Course information

## The course consists of:

**11 comprehensive study texts** outlining contemporary principles and best practice in legal practice management. It is recommended you allow 30–35 hours for review of study material before the workshop starts.

**Assessment items** that apply to your practice's day-to-day operations, including a 35 minute closed book trust accounting exam;

a trust accounting workbook; an ethics scenario; a self-audit on risk, compliance and standards; and an integrated high level business plan.

Attendance and active participation in the **three day face-to-face workshop** tailored to sole practitioners and small practice. This provides an opportunity for you to discuss and apply best

practice principles to your individual circumstances.

**Value-added resources**, including a personalised leadership profile report, a copy of *Tomorrow's Lawyers* by Richard Susskind and *The Australian Solicitors Conduct Rules 2012 in Practice: A Commentary for Australian Legal Practitioners*.

### Day one – Strategy

Encouraging you to take a contextual view of your legal practice in the broader Australian marketplace.

Business planning

Practice finance

Costs, billing and profitability

Business development and marketing

Client service

### Day two – Operations

Considering key operational aspects of business management and optimising the performance of your practice.

Risk and compliance

Information technology and knowledge management

Trust accounting

### Day three – Individual

Focusing on you as an individual and the relationship between business skills and your leadership style.

Ethics and responsibility

Leadership

Managing people

Driving practice success

**On successful completion of the course, you will be issued with a PMC Statement. This statement is required when you apply for a Principal Practising Certificate.**

# Day one – Strategy

The first day of QLS's PMC encourages you to take a strategic view of your legal practice in the broader Australian market.

## 8.15am Introduction

- Understand what is required for successful completion of the course.

*Facilitator:* **Dr Rachel Baird**, Manager, Learning and Professional Development, Queensland Law Society

## 8:30am Business planning

- Identify the key choices that principals must make regarding business models, practice structure and business planning.
- Demonstrate capability to apply sound judgment to specific choices.
- Develop a business plan for your practice.

*Facilitator:* **Dr Peter Lynch**, Founder and Principal, dci lyncon

## 10am Sponsor brief and morning tea

### 10.20am Practice finance

- Understand the planning and budgeting process.
- Prepare budgets for fee income, expenses and cash flow.
- Analyse practice performance using KPIs and benchmarking.
- Identify alternative strategies to manage cash flow and working capital.
- Understand the variables involved in calculating the value of your practice.

*Facilitators:* **Paul Talkington**, Director, Tax and Business, Vincents Chartered Accountants

**Tim Jones**, Director, Tax and Business, Vincents Chartered Accountants

## 11.50am Lunch

### 12.20pm Costs, billing and profitability

- Describe best practice costs and billing arrangements to comply with regulations and ensure client satisfaction.
- Demonstrate knowledge and understanding of these elements and their implementation in a range of scenarios.
- Discuss the potential advantages and disadvantages of alternative fee structures.
- Identify and discuss alternative approaches to improving practice profitability.

*Facilitator:* **Giles Watson**, Director and Consultant, Giles Watson Consulting

## 1.20pm Short break

### 1.30pm Business development and marketing

- Describe alternative approaches to marketing and business development.
- Identify approaches most likely to be effective in your practice and develop a plan for implementation.

*Facilitator:* **Kimberley Wiegand**, Senior Business Development Manager, Norton Rose Fulbright Australia

## 3pm Sponsor brief and afternoon tea

### 3.20pm Client service

- Explain why client service is so important in a legal practice.
- Describe key concepts in relation to value and client service.
- Identify how value can be created and excellent client service can be delivered.
- Describe how to build better, stronger client relationships.
- Explain the risks and benefits of using client service in a practice's marketing.
- Identify how to handle different expressions of client dissatisfaction.

*Facilitator:* **Dr Rachel Baird**, Manager, Learning and Professional Development, Queensland Law Society

## 4.20pm Close

# Day two – Operations

On the second day of QLS's PMC, you will consider key operational aspects of business management and optimising the performance of your practice.

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9am **Risk and compliance – managing and reducing the risk of complaints and action**

- Identify risks specific to practice and apply appropriate approaches to minimise and mitigate risks.
- Identify functions, products and services that may be subject to compliance requirements, and implement practice arrangements.

*Facilitator:* **Robert Mackay**, Solicitor, Legal Risk, Lexon Insurance

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9.45am **Limitation of Liability Scheme**

- Learn about the Scheme, the liability caps and who can participate.

*Facilitator:* **Craig Smiley**, General Manager, Professional Leadership, Queensland Law Society

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10am **Sponsor brief and morning tea**

10.20am **Risk and compliance for business**

- Understand risk management concepts.
- Identify risks specific to practice and apply appropriate approaches to minimise and mitigate risks.

*Facilitator:* **Dr Rachel Baird**, Manager, Learning and Professional Development, Queensland Law Society

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11.20am **Short break**

11.30am **Information technology and knowledge management**

- Discuss the challenges facing legal practices in implementing systems to help manage data and knowledge.
- Describe the optimal selection process for acquisition of practice management IT systems.
- Identify the key components of intellectual capital in legal practice.
- Identify appropriate approaches to the capture, storage and transfer of knowledge in legal practices.

*Facilitator:* **Steven Tyndall**, Managing Director, NextLegal

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12.30pm **Lunch**

1pm **Trust accounting**

- Describe and apply the law and practice of trust accounting to competently handle money received in the course of practice.
- Maintain trust and office account records according to law and professional obligations.
- Ensure compliance with applicable legislation and regulations.

*Facilitator:* **Michael Drinkall**, Team Leader, Trust Account Investigations, Queensland Law Society

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2.45pm **Afternoon tea**

3.20pm **Trust accounting exam**

4pm **Close**

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# Day three – Individual

The third day of QLS's PMC focuses on you as an individual and the relationship between business skills and your leadership style.

## 8.30am **Ethics and responsibility**

- Anticipate, identify, address and resolve ethical issues as they arise in practice.
- Determine the courses of action most appropriate to serve the best interests of the client, the court, the profession, the employer, society and self.
- Resolve conflicts between the various duties.

*Facilitator: Shane Budden, Solicitor, QLS Ethics Centre, Queensland Law Society*

## 10am **Morning tea**

## 10.20am **Leadership**

- Explain the benefits of leadership.
- Identify key leadership behaviours.
- Explain the importance of flexible approaches to leadership.

*Facilitator: Stacey Leake, Human Resources Manager, Norton Rose Fulbright Australia*

## 11.50am **Lunch**

## 12.25pm **Managing people**

- Describe the elements of managing people, supervision and performance management applicable to a legal practice.
- Apply appropriate skills and systems to managing self and others.

*Facilitator: Melinda Fisher, Consultant, Midja*

## 1.40pm **Short break**

## 1.50pm **Driving practice success**

- Develop insights into the role of law practice principal, and identify tips and traps for new principals.

*Facilitator: Giles Watson, Director and Consultant, Giles Watson Consulting*

## 2.50pm **Close**



# Course faculty

## Dr Rachel Baird



Manager, Learning and Professional Development, Queensland Law Society

Rachel is the main contact for QLS PMC delegates and ensures the smooth operation of the workshops. Rachel has over 25 years legal experience in the military, government, academia and the resources industry. She specialised in environmental law before developing expertise in managing compliance, audit and risk.

Rachel holds Bachelor degrees in Arts and Law, a Masters of Law and obtained her Doctorate from Melbourne University in 2006. She is on the Editorial Board of the Australian Environmental Review (Lexis Nexis), a non-executive director and advisory board member.

## Shane Budden



Solicitor, QLS Ethics Centre Queensland Law Society

Shane was admitted in 1992 and worked as a general practitioner for several years before joining the Ipswich City Council in-house legal team. In 2001 he moved to the Queensland Building Services Authority's in-house legal team, taking over management of the team in 2006. During this time Shane served on, and later chaired, the Queensland Law Society's Government Lawyers Committee. Shane joined QLS in 2014 as a Manager Advocacy and Policy/ Senior Policy Advisor and now works in QLS Ethics Centre as an Ethics Solicitor, providing Bespoke Ethics Sessions and ethics guidance to the profession and publishing articles in Proctor and on the QLS Ethics Centre website.

## Michael Drinkall



Team Leader, Trust Account Investigations, Queensland Law Society

Michael is highly experienced in conducting examinations of solicitors' trust accounts and is recognised as a market leader in providing advice on trust accounting.

Before joining QLS, Michael was a manager at a private accounting firm in the business services and audit sector. Michael has a business degree and is a member of CPA Australia. He regularly lectures at Bond University and QUT on trust accounting.

## Melinda Fisher



Consultant, Midja

Melinda is a facilitator, business coach and mentor, specialising in the areas of company culture, values alignment and authentic principle based leadership.

Melinda started her career as a consultant at Price Waterhouse Coopers. She was appointed partner at Shine Lawyers in 2006. In 2016, prior to leaving Shine Lawyers to pursue her own consultancy business, Melinda worked in a variety of roles, including Legal Manager, Knowledge Manager and National Learning and Development Manager. Melinda completed a Bachelor of Law and Information Technology at QUT. She is a Franklin Covey Accredited Facilitator, an accredited consultant of the Minessence Values Framework and a member of the Australian Lawyers Alliance and the Australian Institute of Training and Development.

## Tim Jones



Director, Tax and Business, Vincents Chartered Accountants

Tim advises legal firms on start-up structuring, restructuring and complying arrangements throughout the many associated stages of ATO intervention. Assisting firms to improve their efficiencies and profitability is a particular interest. Tim is often engaged to assist in dispute resolution with a focus on achieving equitable compliant outcomes.

Tim has a Bachelor of Accounting and applies a sharp commercial approach to problem solving.

# Course faculty

## Stacey Leake

Human Resources Manager,  
Norton Rose  
Fulbright Australia



Stacey Leake is an accomplished HR practitioner with 10 years' experience in generalist human resources gained within the legal industry. She holds a Bachelor of Business, HR from Queensland University of Technology, an Associate Degree in Law from Southern Cross University and is a member of the Australian Human Resources Institute.

As the Human Resources Manager at Norton Rose Fulbright Australia, Stacey is responsible for the delivery of a broad range of human resource strategies and initiatives that enable Norton Rose Fulbright Australia to recruit, develop and retain a high performing workforce.

## Dr Peter Lynch

Founder and Principal,  
dci lyncon



Peter's boutique consultancy specialises in practice improvement for professional service firms and guidance for individual professionals. Consultancy is offered on structure, governance, partner behaviour, pricing, productivity, processes and client connection. Peter helps his clients find an appropriate harmony between their professional, financial and personal objectives. Peter has a Bachelor of Commerce, Master of Business Administration and a Doctorate of Philosophy. He is a member of ALPMA and regularly publishes in QLS's Proctor publication.

## Robert Mackay

Solicitor, Legal Risk,  
Lexon Insurance



Robert plays an active role in the development of risk management tools and is heavily involved in the effective management of services offered to the legal profession. Robert has helped develop and runs a system testing program focused on high-value claim areas, and has run hundreds of these workshop programs at legal practices across Queensland.

Robert was admitted as a solicitor in 2005 and has worked in both private practice and in-house. He has a Bachelor of Law and Arts and is often asked to present to Queensland practices and other organisations on legal risk management.

## Craig Smiley

General Manager,  
Professional Leadership,  
Queensland Law Society



Craig is the General Manager of Professional Leadership at Queensland Law Society. He is responsible for almost all of the Society's regulatory functions. He has in past lives been a solicitor and barrister in private practice as well as a government lawyer.

## Paul Talkington

Director, Tax and Business,  
Vincents Chartered  
Accountants



Paul is involved in business restructuring, cash flow management, finance applications and due diligence. Before joining Vincents in 2008, Paul worked in various roles, including middle-market advisory at Deloitte, CFO of a national logistics group and GM Commercial for a mining supplies business. Paul is interested in practical solutions to improve business gross margins and cash flows. He has a Bachelor of Arts in accountancy and is a member of the Institute of Chartered Accountants.

# Course faculty

## Steven Tyndall



Managing Director,  
NextLegal

Steven formed NextLegal in 2014 to provide legal firms with IT solutions that improve efficiencies, reduce risk and enhance their ability to both service and attract clients.

Prior to NextLegal, Steven led the internal IT function for Lander and Rogers and McCullough Robertson. He has a Professional Certificate in Business Information Systems and is accredited in Prince2 Project Management. Steven has a number of Microsoft and Citrix certifications and is currently undertaking a Master in Business Information Systems.

## Giles Watson



Director and Consultant,  
Giles Watson Consulting

As a consultant, Giles aims to assist law firms in realising their potential. Prior to establishing his consultancy in 2015, Giles managed the QLS PMC, was responsible for a range of practice support resources and advised small practice principals on practice management issues. Giles has worked as a business development manager in London and was the manager of Lexcel, the Law Society of England and Wales' legal practice management quality mark. He has a Master in Marketing, an MBA and lectures at QUT on legal cost communication.

## Kimberley Wiegand



Senior Business  
Development Manager,  
Norton Rose Fulbright  
Australia

Kim has extensive experience advising on the full scope of marketing and business development within law firms. She has developed keen insight into the skills required by modern lawyers through several senior marketing and business development roles in both global top tier and national firms across Australia and the UK.

Backed by over 15 years of industry experience, Kim brings a practical approach to coaching and guiding lawyers through an often challenging landscape. Kim has a Bachelor of Business in Marketing.

## Contact

### Dr Rachel Baird

Manager, Learning and  
Professional Development

Find out more

 [qls.com.au/pmc](https://qls.com.au/pmc)

 [pmc@qls.com.au](mailto:pmc@qls.com.au)

 07 3842 5961

## Location

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