



PROGRAM

Practice Management Course

13, 14 and 21 July 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

August 3, 4 and 5

October 19, 20 and 27

Medium and large practice focus

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

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Sponsored by



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**. 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, and a copy of *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

Leading wellbeing in the workplace

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 Welcome

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

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

8:40am 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: **Karina Collins**, Partner Advisory, BDO

10.10am Morning tea

10.35am Practice finance and profitability

- Understand the planning and budgeting process.
- Analyse practice performance using KPIs and benchmarking.
- Understand the variables involved in calculating the value of your practice.

Facilitators: **Peter Camenzuli**, Partner, Pitcher Partners
Kylie Lamprecht, Partner, Pitcher Partners

12.05pm Lunch

12.45pm Costs and billing

- 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: **Stafford Shepherd**, Director, QLS Ethics Centre, Queensland Law Society

1.50pm Business development and marketing

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

Facilitator: **Renee Bennie**, Head of Client Development, Corrs Chamber Westgarth

3.20pm Afternoon tea

3.40pm 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.
- Identify how to handle different expressions of client dissatisfaction.

Facilitator: **Carl White**, Client and Brand Director, CXINLAW

4.50pm 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.

8.15am **Legal risk – Lexon**

- 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.

Facilitators: **Tracy Skellern**, Deputy Risk Counsel, Lexon Insurance
Emma-Jane McNicol, Legal Risk Solicitor, Lexon Insurance

9am **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

10am **Sponsor brief and morning tea**

10.25am **Information technology and knowledge management**

- Discuss the challenges facing legal practices in implementing systems to help manage data and knowledge.
- Identify the key components of intellectual capital in legal practice.

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

11.25am **Lunch**

12.05pm **Trust accounting (Q&A session included)**

- 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

1.50pm **Afternoon tea**

2.20pm **Trust accounting exam**

2.55pm **Close**

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.

8.15am **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: **David Bowles**, Solicitor, QLS Ethics Centre, Queensland Law Society

9.45am **Morning tea**

10.05am **Leadership**

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

Facilitator: **Rolf Moses**, Director of People and Development, Norton Rose Fulbright Australia

11.35am **Short break**

11.45am **Leading wellbeing in the workplace**

- Learn about the current state of wellbeing in the legal profession.
- Identify why the legal profession is particularly susceptible to mental health issues.
- Develop a workplace framework to create a mentally healthy team.
- Understand when an employee is struggling with a mental health concern, and be able to proactively support and assist them.

Facilitator: **Rolf Moses**, Director of People and Development, Norton Rose Fulbright Australia

12.45pm **Lunch**

1.15pm **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

2.50pm **Driving practice success**

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

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

3.50pm **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.

Renee Bennie

Head of Client Development, Corrs Chamber Westgarth



Renee has built her career with domestic and international law firms. Renee has experience across all aspects of marketing and business development including business planning, pitching, sales coaching and client account management.

Renee has developed great insight into the challenges faced by practitioners and brings a client centric approach to business development. Renee has a Bachelor of Business in Management and Public Relations and often contemplates finishing her law degree.

David Bowles

Solicitor, QLS Ethics Centre, Queensland Law Society



David is responsible for providing ethical guidance to Queensland legal practitioners.

David was admitted as a solicitor in 1996 and worked in private practice before joining QLS in 2012. His experience includes crime, property, litigation and estate planning. David has a Bachelor of Arts and Law. He is a trusted ethical advisor and regularly delivers relevant leadership initiatives to the legal profession.

Peter Camenzuli

Partner, Pitcher Partners



Peter Camenzuli is a partner at Pitcher Partners, Brisbane. Peter has over 25 years' experience and became a partner of the firm in 2002.

Peter heads up the firm's Business Advisory Services Division where he works closely with a variety of small to medium sized businesses. Peter's client base includes a number of Professional Services firms where he provides advice on both the financial aspects of the firm and the individual partner.

Karina Collins

Partner Advisory, BDO



Karina is the national leader for BDO's consultancy division. She works with client to develop strategies and solutions for complex business challenges and has a background in innovation, technology and transformation. Most recently Karina has worked in the area of ICT Procurement and Transformation, Digital Transformation, Data Analytics & Insights. Karina also sits on multiple boards in the Professional Services, Health, Not for Profit and Social Sectors.

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.

Kylie Lamprecht



Partner, Pitcher Partners

Kylie takes care of many of the difficult financial tasks clients face and provides a full service to them, focusing on the business, family group structure, asset protection and structuring. Kylie also understands the impact of regulations and statutory obligations on her clients, and helps them implement solutions to ensure business and financial processes are well managed.

Kylie's strength is her focus on client relationships and service. The 'bigger picture' is always in the front of her mind. Kylie is regarded as a trusted advisor and is regularly involved in ongoing planning by liaising with key stakeholders to ensure an informed outcome is achieved for each of her clients.

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.

Emma-Jane McNicol



Legal Risk Solicitor, Lexon Insurance

Emma-Jane plays an active role in the effective management of risk services offered to the legal profession in Queensland. Emma-Jane visits insured practices throughout Queensland in order to run Lexon's system testing program focused on the areas where there have been high-value claims for practitioners. The strength of the program conducted by Emma-Jane is the focus on processes and file management Emma-Jane works with the insureds to achieve optimal results for the client and the firm. Emma-Jane also provides risk management advice and assistance in relation to other matters for all Lexon insureds.

Emma-Jane was admitted to practice in 1998 and holds a Bachelor of Law and Arts. She has worked in both private practice and in-house for major financial institutions. Her focus in work has always been to minimise risk for her clients within the required legal and regulatory framework.

Course faculty

Rolf Moses



Director of People and Development, Norton Rose Fulbright Australia

Rolf has over 20 years' human resources and management experience gained in large retail and international legal firms. He specialises in the development and execution of human resources and organisational development strategies focused on the attraction, retention, development and accredited mediator, counsellor and accredited coach of the Hogan Leadership Psychometric Inventories. He also has a Bachelor of Commerce.

Tracy Skellern



Deputy Risk Counsel, Lexon Insurance

Tracy has been extensively involved in creating and updating legal risk tools provided for the Queensland legal profession. Prior to Lexon Insurance, Tracy worked in various positions in the legal industry including private practice, as a consultant for legal practice management software, as a precedent lawyer and as general manager of a specialist law firm.

Tracy has conducted over 1000 risk management workshops for Queensland firms and holds a Bachelor of Laws.

Stafford Shepherd



Director, QLS Ethics Centre, Queensland Law Society

Stafford is a recognised expert in law practice ethics. Before joining QLS in 2008, Stafford practised as a solicitor in conveyancing, leasing, will and estate administration, and equitable doctrines.

Stafford's team provides support and ethical guidance to Queensland legal practitioners, and is heavily involved in thought leadership and continuing legal education. Stafford holds a Bachelor and Masters of Laws. He has a postgraduate certificate in Arbitration and Mediation and is a Graded Arbitrator.

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.

Carl White



Client and Brand Director, CXINLAW

Carl's principal focus is working strategically with firms to define service objectives, deliver client insight and improve performance against the indicators of client experience excellence. He is passionate about the impact of client experience in professional services.

Carl entered the legal sector with Ashurst in 2002. He co-authored the highly-regarded 'Customer Experience in Law' report in 2012 and led the market-leading Australian research in 2015, which was supported by ALPMA.

Location

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Find out more

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