

Practice Management Course: Sole practitioner to small practice focus

Monday 13 – Friday 17 May
2024/2025 CPD year | Online

Overview

The QLS Practice Management Course (PMC) is an investment in your future. It is designed for aspiring Principals of small legal practices or sole practitioners. This online course gives you the essential skills and expert knowledge needed to manage a legal practice. You will learn the art of attracting and retaining clients, managing people, appropriate and effective ways to bill clients and manage their expectations, business planning and development, managing practice finances and trust accounts, identifying and managing professional risks and your professional ethical obligations. As a PMC alumni, you will have access to ongoing bespoke support from experts in trust accounting, ethics and risk management. You will also have access to ongoing support from the QLS Practice Support and Trust Accounting consultancies.

10 CPD Points



Day 1 | Monday 13 May

8.45am **Log in**

9am **Welcome remarks**

Presenter: **Mark Magner**, Manager, Education, Queensland Law Society

9.15am **Break**

9.30am **Business planning**



This unit explores the process of business planning and determining a business model and strategy with practice goals and objectives in mind.

Presenter: **Giles Watson**, Legal Practice Management Consultant

11am **Break**

11.15am **Practice finance**



Effective finance management requires planning, monitoring, control and discipline. This unit provides a framework for the development of practice budgets and discussion of Key Performance Indicators and the importance of managing practice cash flow.

Presenter: **Tim Jones**, Director, Business Advisory, Vincents Chartered Accountants

1.15pm **Close | Day 1**

Day 2 Presented by SCLQ | Tuesday 14 May

8.45am **Log in**

9am **Supreme Court Library Queensland Presentation**

9.15am **Business development and client service**



Legal practice marketing and business development is becoming increasingly more ambitious, competitive and sophisticated. Understand how marketing and business development can support legal practices, and common marketing activities and selling techniques that are used.

Client perceptions of the quality of client service have a dramatic impact on client retention, referrals, justifying fee levels, fee recovery, cash flow and profitability. Learn the skills to deliver excellent client service in terms of personal skills, practice systems and culture.

Presenter: **Katherine Gilbey**, Katherine Gilbey Consulting – Law Firm Marketing and BD Consultant Speaker; Author Coach: and Member, QLS Practice Management Course Committee

10.45am **Break**

11am

Trust accounting

This unit provides a framework for the competent management of trust and office account records involving basic bookkeeping procedures and the responsibility of solicitors to account for money received on behalf of others.

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

1.15pm

Close | Day 2**Day 3 | Wednesday 15 May**

8.45am

Log in

9am

Lexon Insurance

Learn how to implement systems and procedures to ensure critical issues and processes are implemented to protect your legal practice.

Presenters: **Emma-Jane McNicol**, Senior Risk Solicitor, Lexon Insurance

10am

Break

10.15am

Appropriate management systems

Understand professional risk management concepts and identify risks specific to practice and apply appropriate approaches to minimise and mitigate risks.

Presenter: **David Bowles**, Special Counsel, QLS Ethics and Practice Centre, Queensland Law Society

11.15am

Break

11.30am

Ethics

Solicitors must have the knowledge and skills to act ethically and to display professional responsibility and courtesy in all dealings. Reflect on wider issues facing the legal profession and review the knowledge of the formal rules of conduct.

Presenter: **Shane Budden**, Special Counsel, QLS Ethics and Practice Centre, Queensland Law Society

12.30pm

Close | Day 3

Day 4 | Thursday 16 May

8.45am **Log in**

9am **Costs & billing**



The effective management of costs and billing is critical to ensuring client satisfaction and practice profitability. Looking at costs as a compliance issue, and focus on best practice approaches to communication, management, and administration.

Presenter: **Adam Bloom**, Principal, Bloom Costs: Costs Lawyer and Court Appointed Costs Assessor

10.30am **Break**

10.45am **Leading wellbeing in the legal profession**



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 and be equipped with the skillset to proactively support and assist it.

Presenter: **Stephanie Cowie**, Legal Workplace and Culture Consultant, Queensland Law Society

12pm **Break**

12.15pm **Demystifying information technology**



Explore the relationship between performance, productivity, and competitive advantage in legal practice and how use of effective technology and knowledge can be combined and applied.

Presenter: **Ben Lowry**, Director of Legal Strategy & Solutions, Tickbox

1.45pm **Close | Day 4**

Day 5 | Friday 17 May

8.45am **Log in**

9am



Leading yourself: Understanding your leadership strengths and style

Self-leadership is the cornerstone of all leadership, and self-awareness is a critical link to understanding how your leadership styles can enhance your own leadership potential and also how others perceive your leadership capabilities based on your personality traits. This session will discuss the latest research on emotional intelligence and self-leadership, provide context to the concepts of “leadership” and “management”, and suggest approaches and behaviours that can help you effectively manage a legal practice by understanding the impacts of your own unique results on the Hogan Personality Inventory (HPI). The presenter is a Certified Hogan’s Assessor and conducts a group debrief of the seven HPI scales.

Presenter: **Rebecca Niebler**, Mindset and performance coach & owner, Mind Cultivation

10.15am **Break**

10.30am



Leading others: Essential skills for inspiring leadership

The presenter is a former Partner in a large national law firm and a currently a leadership coach, providing coaching and leadership expertise to the legal profession. In this session, you will learn more about a leader’s mindset, how to manage uncomfortable conversations and deal with performance management issues, and learning about key principles of coaching others to perform at their best and build team resilience – all with a view to ultimately developing critical skills and abilities for effective management in a legal practice.

Presenter: **Midja Fisher**, Corporate Facilitator; Speaker; Author; Coach; and Member, QLS Practice Management Course Committee

12pm **Break**

12.05pm **Assessment recap**

Presenter: **Mark Magner**, Manager, Education, Queensland Law Society

12.20pm **Close**

Key Assessment Dates

5pm Monday
20 May 2024

Trust Accounting Workbook

Although this workbook is not graded, it is mandatory for you to complete it as part of the Substantial Participation requirement under rule 37(1) of the Queensland Law Society Administration Rule 2005.

Monday 20
May 2024

Trust Accounting Exam

Multiple choice online exam with 45 questions and a duration 60 minutes, testing your understanding and application of trust accounting and costs disclosure concepts and regulations.

Available
7am - 2pm

To be commenced and completed on the LMS at a convenient time for you between 7am – 2pm on Monday 20 May 2024.

5pm Friday 14
June 2024

Business Plan

Business Plan assessment to be submitted to the LMS by **Friday 14 June 2024**.

5pm Friday 14
June 2024

Ethics Scenario

Ethics Scenario assessment to be submitted to the LMS by **Friday 14 June 2024**.

5pm Friday 14
June 2024

Self-Audit of Business Risk

Ethics Scenario assessment to be submitted to the LMS by **Friday 14 June 2024**.