

Practice Management Course: Sole Practitioner to small practice focus

Monday 23 – Friday 27 September | 9-1pm | Online



Program

Day 1 | Monday 23 September

8.45am Logon

9am **Welcome remarks**

Presenter: **Sandra Pepper**, General Manager and Solicitor, Queensland Law Society

9.15am **Break**

9.30am **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



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: **Sam Heaney**, Business Advisory, Vincents Chartered Accountants



1.15pm **Day 1 concludes**

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Day 2 Presented by SCLQ | Tuesday 24 September

8.45am Logon

9am Supreme Court Library Queensland Presentation



9.15am **Costs & Billing**

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

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



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**, Manager, Trust Account Investigations, Queensland Law Society



1.15pm Day 2 concludes

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Day 3 | Wednesday 25 September

8.45am Logon

9am **Lexon Insurance**

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

Presenter: **Emma-Jane McNicol**, Legal Risk Solicitor, Lexon Insurance



10am Break

10.15am **Appropriate management systems**

Understand professional management concepts and identify risks specific to practice and apply appropriate approaches to minimise and migrate 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: **David Bowles**, Special Counsel, Ethics, Queensland Law Society



12.30pm Day 3 concludes

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Day 4 | Thursday 22 August

8.45am Logon

9am 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



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 Day 4 concludes

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Day 5 Presented by Clarence Workspaces for Lawyers | Friday 23 August

8.45am Logon

9am Clarence Presentation

CLARENCE
WORKSPACES FOR LAWYERS

9.15am **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



11.45pm **Assessment recap**

Presenter: **Sandra Pepper**, General Manager and Solicitor, Queensland Law Society

12.pm Day 5 concludes

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Assessment due dates

5pm Monday
30 September
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.

5pm Monday
30 September
2024

Trust Accounting Exam

Available
7am - 2pm

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.

To be commenced and completed on the LMS at a convenient time for you between **7am – 2pm on Monday 30 September 2024.**

5pm Friday
25 October
2024

Business Plan

Business Plan assessment to be submitted to the LMS by **Friday 25 October 2024.**

5pm Friday
25 October
2024

Ethics Scenario

Ethics Scenario assessment to be submitted to the LMS by **Friday 25 October 2024.**

5pm Friday
25 October
2024

Self-Audit of Business Risk

Risk Self-Audit assessment to be submitted to the LMS by **Friday 25 October 2024.**

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Presenters



Adam Bloom

Principal, Bloom Costs: Costs Lawyer and Court Appointed Costs Assessor

Originally admitted in NSW in 1987, Adam practised in a range of commercial litigation firms in NSW until 1999, when he changed career direction and moved into legal costs consulting.

For the last twenty years, Adam has practised and specialised exclusively in all aspects of legal costs law, ranging from assessment of costs in all Queensland and Federal courts, to advice on costs agreements and law firm costs management, to becoming a court appointed Costs Assessor in 2008.

Adam regularly presents costs seminars for various professional bodies and in-house at law firms, and has established himself as one of the pre-eminent costing specialists in Brisbane and Queensland generally.



David Bowles

Special Counsel, QLS Ethics and Practice Centre, Queensland Law Society

David was admitted as a solicitor in 1996 and was in private practice from that time until joining Queensland Law Society's QLS Ethics and Practice Centre in November 2012.

David's experience, initially as an employee and then as a sole practitioner includes crime, property, litigation and estate planning. As an ethics solicitor he is responsible for providing ethical guidance to members, and continuing legal education.

He holds postgraduate certificates in Artificial Intelligence from the Said Business School at Oxford University, in Cybersecurity from Harvard University Extension School, in Project Management from the University of Adelaide EdX program and is a director of the Australasian Computer Law Institute.

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Stephanie Cowie

Legal Workplace and Culture Consultant, Queensland Law Society

Stephanie has over ten years' experience working as a lawyer in-house and in private practice in Australia and the UK. She has also worked in education for five years following the completion of a Masters of Education (Work and Learning Studies) and a Graduate Diploma of Secondary Teaching.

Stephanie has specifically worked with learners to manage well-being and mental health, and to build cultures of inclusion. She has experience researching, designing curricula, and teaching and engaging with a range of audiences via blended/hybrid learning formats.

Stephanie is an Accredited Mental Health First Aid Instructor and is passionate about wellbeing, developing lawyers, legal education and promoting positive workplace cultures.



Michael Drinkall

Manager, Trust Account Investigations, Queensland Law Society

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 provides presentations and training sessions on trust accounting to the profession and universities.

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

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Midja Fisher

Corporate Facilitator, Speaker, Author, Coach; Member of QLS PMC Committee

Midja is a leadership expert who delivers high-energy keynote presentations and corporate workshops that inspire audiences to live and lead with passion and purpose. Through her work with individuals and organisations, Midja creates confident, authentic leaders who love what they do.

What's unique about Midja is her infectious energy, coupled with her extensive business and leadership knowledge, as a former lawyer and partner of a national law firm and learning and development specialist.

Her company specialises in leadership training and coaching for lawyers. Midja is also the author of three books – Unshakeable Confidence, Great Lawyer to Great Leader and Take Off The Cape.

When not working with clients, Midja can be found soaking up the sun on the GC beaches and sipping champagne whilst sharing worst-date stories with her girlfriends.

Find out more about Midja at www.midja.com.au



Katherine Gilbey

Marketing & Business Development Consultant at KG Consulting CO

Katherine Gilbey is an experienced Marketing & Business Development Consultant who has specialised in law firm marketing for more than a decade.

Working exclusively in law her entire career - Katherine has worked in or with more than 20 different firms – including top tier and global firms in Australia and the United Kingdom.

Before starting her consultancy in 2022, Katherine held the role of Head of Marketing & Business Development at Mullins Lawyers for eight years. A former ALPMA Queensland Committee member, Katherine is well connected within the legal industry and has presented at legal industry specific conferences – including the ALPMA Summit in 2022.

As the Director of KG Consulting Co, Katherine now helps law firms, legal service providers and technical professionals win, grow and retain work with existing and target clients. She does this by first helping firms identify and articulate their unique value proposition, and then helping them to create habits, assets, and processes to efficiently manage those valued relationships.

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Sam Heaney

Business Advisory, Vincents Chartered Accounts

Sam specialises in advising small to medium business clients engaged in activities across a variety of industries including professional services, building and construction, e-commerce and retail operations.

This regularly involves assistance with the business owner's personal affairs as well as business operations.

Sam enjoys working with motivated business owners looking to grow and develop long term relationships.

Sam joined Vincents in 2017 as an accountant and worked through to his appointment as Director of the firm in July 2023.

Prior to working with Vincents Sam worked as a financial controller to a number of business' before joining a small accounting firm for a number of years.



Ben Lowry

Director of Legal Strategy & Solutions, Tickbox

Ben has been working exclusively with small and boutique law firms, as part of a legal vertical within Tickbox—a local, comprehensive IT outsourcing organisation. During his four years, Ben has grown the legal client base consistently year on year, by enabling clients to gain access to big law technology service and support, through a cost effective and scalable model.

Prior to this, Ben spent over 15 years working for local, national and international law firms, in senior in-house technology roles. During this period, Ben gained an immense amount of experience in assessing and deploying technology which aligned with organisational requirements, to deliver successful project outcomes.

As part of his work within the industry, Ben regularly engages with vendors, membership organisations, and other value-add third parties to ensure his clients receive an independent and qualified view of the legal technology landscape.

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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 she works with the insureds to achieve optimal results for the client and the practice. 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.



Rebecca Niebler

Mindset and leadership coach / Owner, Mind Cultivation

Rebecca is a mindset and performance coach and trainer working with legal professionals, leaders, teams and organisations.

Prior to setting up her own business, Mind Cultivation, Rebecca was the Organisational Culture and Support Officer at the Queensland Law Society where she developed and facilitated QLS resources and materials in the resilience, wellbeing, leadership development and workplace culture space. She was also the Secretary of the QLS Wellbeing Working Group and the Equity and Diversity Committee.

Over the course of her career, Rebecca has worked across a range of industries in Australia and has more than 10 years of diverse experience in organisational learning & development roles as well as facilitating cultural change programs. In addition to her psychology degree, she is accredited in the Hogan assessment tool and holds a Certificate IV in Training and Assessment.

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Sandra Pepper

General Manager, Education and Solicitor, Queensland Law Society

Sandra is a senior lawyer with over 25 years' experience in the legal industry. Sandra practised in property and finance law in private practice in England and Australia before moving into the legal knowledge management and learning and development sectors. Her experience spans all stages of adult learning and development such as needs analysis, strategy development, content creation, course delivery and evaluation.

Sandra is passionate about enabling lawyers, through continued education, to develop strong and profitable business practices while maintaining a positive and inclusive cultural environment.



Giles Watson

Legal Practice Management Consultant

Giles helps law practices realise their potential through coaching, consultancy and tailored professional development. He specialises in client-facing challenges such as positioning, strategy, pricing, marketing, business development, customer experience and client service.

Prior to setting up his own consultancy in 2015, he managed the Practice Management Course at Queensland Law Society, ran a practice management quality mark scheme for the Law Society of England and Wales, and was a business development manager for three London law firms.

Giles has a degree in politics, a Masters in marketing and an MBA. He lectures on costs communication for QUT's Diploma of Legal Practice, and on 'Dynamic strategy and disruptive innovation' for Kaplan Business school's MBA course.