

Practice Management Course

Medium to large practice focus

Monday 22–Friday 26 March 2021

Online

Overview

The QLS Practice Management Course (PMC) is an investment in your future. It is designed for aspiring Principals of medium to large firms. 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.

10 CPD Points



Day 1 | Monday 22 March

8.45-9.15am

Welcome remarks

Presenter: **Marko Novakov**, Manager, Professional Advancement, Queensland Law Society

9.15-9.30am

Break

9.30-11am

Business planning



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

There is an assessment item associated with this session. See the final page of the program for details.

Presenters:

Mylton Burns, Principal, Commercial Litigation and Insurance, McInnes Wilson Lawyers

Giles Watson, Legal Practice Management Consultant

11-11.15am

Break

11.15am-
1.15pm

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: **Jeremy Jones**, Partner - Private Business and Family Advisory, Pitcher Partners

1.15pm

Close | Day 1

Day 2 | Tuesday 23 March

9-10.30am

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: **Tony Deane**, Special Counsel, Clayton Utz

10.30-
10.45am

Break

10.45am-
1pm

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

1pm

Close | Day 2

Day 3 | Wednesday 24 March

9-10am

Lexon Insurance



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

Presenters: **Leyton Cronk**, Legal Risk Solicitor, Lexon Insurance and **Uditi Desai**, Legal Risk Solicitor, Lexon Insurance

10-10.15am

Break

10.15-
11.45am

Appropriate management systems



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

Presenter: **Randal Dennings**, Lawyer and Member, Queensland Law Society Banking and Financial Services Law Committee

11.45-12pm

Break

12-1pm

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, QLS Ethics and Practice Centre, Queensland Law Society

1pm

Close | Day 3

Day 4 | Thursday 25 March

9-10.15am

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

10.15-
10.30am

Break

10.30-
11.45am

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. The presenter is a Certified Hogan's Assessor and will draw upon how effective leadership styles can have a positive influence on workplace culture.

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

11.45am-
12pm

Break

12-1.15pm



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

1.15pm

Close | Day 4

Day 5 | Friday 26 March

9-10.30am



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: **Renee Bidwell**, Head of Client Development, Corrs Chambers Westgarth

10.30-
10.45am

Break

10.45am-
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**, Strategy & Solutions Specialist, Tickbox

12.15-
12.30pm

Break

12.30-
12.45pm

Assessment recap

Presenter: **Marko Novakov**, Manager, Professional Advancement, Queensland Law Society

12.45pm

Close | Day 5

Key Assessment Dates

Monday 29
March 2021

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 29
March 2021

Trust Accounting Exam

7am-2pm

Multiple choice online exam with 45 questions and a duration 45 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 29 March 2021.

Friday 16
April 2021

Business Plan

Business Plan assessment to be submitted to the LMS by **Friday 16 April 2021**.

Friday 16
April 2021

Ethics Scenario

Ethics Scenario assessment to be submitted to the LMS by **Friday 16 April 2021**.

Friday 16
April 2021

Risk Audit and Scenario

Risk assessment to be submitted to the LMS by **Friday 16 April 2021**.