

# Practice Management Course

## Sole Practitioner to Small Practice Focus

Monday 18 October - Friday 22 October  
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



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## Day 1 | Monday 18 October

8.30am **Log in**

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.

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

1.15pm **Close | Day 1**

## Day 2 | Tuesday 19 October

8.45am **Log in**

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

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 20 October

8.45am **Log in**

9-10am **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**, Solicitor, Legal Risk, Lexon Insurance

10-10.15am **Break**

10.15-  
11.15am

**Appropriate management systems**



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

Presenter: **Mark Illidge**, Practice Support Solicitor, QLS Ethics and Practice Centre, Queensland Law Society

11.15-  
11.30am

**Break**

11.30am-  
12.30pm

**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 21 October

8.45am **Log in**

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: **Lauren Phelps**, Professional Development Manager, Queensland Law Society

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 22 October

8.45am

## Log in

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: **Kim Wiegand**, Founder, Julip Advisory

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

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

12.45pm

### Close | Day 5

## Key Assessment Dates

Monday 25  
October  
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 25  
October  
2021

### Trust Accounting Exam

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.

7am-2pm

**To be commenced and completed on the LMS at a convenient time for you between 7am – 2pm on Monday 25 October 2021.**

Friday 12  
November  
2021

### Business Plan

Business Plan assessment to be submitted to the LMS by 5pm, **Friday 12 November 2021**.

Friday 12  
November  
2021

### Ethics Scenario

Ethics Scenario assessment to be submitted to the LMS by 5pm, **Friday 12 November 2021**.

Friday 12  
November  
2021

### Risk Audit and Scenario

Risk assessment to be submitted to the LMS by 5pm, **Friday 12 November 2021**.