

14th  
SOLO  
& SMALL  
FIRM CONFERENCE  
STRATEGIC SOLUTIONS



14th  
SOLO  
& SMALL  
FIRM  
CONFERENCE  
AGENDA





**AGENDA-AT-A-GLANCE**

- 8:00 - 9:00** Continental Breakfast sponsored by **LexisNexis®**  
Exhibitors, Ingenious Bar, and Networking

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- 9:00 - 9:05** Welcome and Opening Remarks

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- 9:05 - 10:00** **Opening Plenary**  
The T-Shaped Lawyer: Embracing New Skill-Enhancing Models to Become Tomorrow's Lawyer Today

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- 10:00 - 10:30** Coffee and Networking Break sponsored by **TitlePLUS®**  
Exhibitors, Ingenious Bar, and Networking

**CONCURRENT BREAKOUT SEMINARS**

Registrants attend either Seminar A, B, C, or D at each time. (Seminar D not webcast\*) Live webcast sponsored by **Thomson Reuters®**

	SEMINAR A	SEMINAR B	SEMINAR C	SEMINAR D: Workshops*
<b>10:30-11:20</b>	Developing a Niche Practice Area	New Research Tools for Lawyers and How to Adopt Them	Tips for Maximizing Work/Life Balance	How to Excel When Dealing with Litigation Practice Issues: A View from the Bench
<b>11:20-11:25</b>	<i>Room Change</i>			
<b>11:25-12:15</b>	Don't Fail to Plan or Plan to Fail: Grow Your Law Firm	Cybersecurity: Protect Your Law Firm	How to Run a Home-Based Practice	Winning at Strategic Networking
<b>12:15-1:15</b>	Lunch sponsored by <b>Apogee IT Services Canada</b> Exhibitors, Ingenious Bar, and Networking			
<b>1:15-2:05</b>	Marketing Plan Strategies to Make Your Law Firm Stand Out	Cannabis in the Workplace <b>10 m EDI e</b>	Intake, Contingency, and Fulfillment Systems to Enhance Your Practice	The Power of Vision: Three Keys to Creating the Practice (and Life) You Love
<b>2:05-2:10</b>	<i>Room Change</i>			
<b>2:10-3:00</b>	A Primer on Earning the Business of Large Organizations	Using Business Metrics to Understand and Grow Your Practice	Increasing the Success of Your Firm through Diversity <b>50 m EDI e</b>	The Email Warrior: How to Clear Your Inbox and Keep It That Way!
<b>3:00-3:30</b>	Coffee and Networking Break sponsored by <b>TitlePLUS®</b> Exhibitors, Ingenious Bar, and Networking			
<b>3:30-4:30</b>	<b>Closing Plenary</b> Simple Tech Solutions to Accelerate Your Practice			
<b>4:30-6:00</b>	Cocktail Reception			

\*Workshops are for in-person attendees only and are on a first-come, first-served basis. Space is limited.  
Video recordings will be available post-program.

**e** = Session contains EDI content.

**Total CPD = 5 h Professionalism **P** + 1 h EDI Professionalism **e****

LSO CPD is an Accredited Provider of Professionalism Content.



**in** Law Society of Ontario CPD

**@LSOCPD #14SoloSmall**





JUNE 4

9:00 a.m. - 4:30 p.m.

LIVE IN TORONTO, Metro Toronto Convention Centre,  
North Building, 255 Front Street West, Toronto  
or LIVE WEBCAST

CO-CHAIRS



**Kathleen Erin Cullin, C.S.**  
*Wallbridge, Wallbridge*



**Barbara Hicks**  
*Hicks & Hicks Professional Corporation*

STEERING COMMITTEE



**Monica Goyal**  
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**Aaron Grinhaus**  
*Grinhaus Law Firm*



**Jennifer Reynolds**  
*Fresh Legal*

# AGENDA

**8:00 a.m. – 9:00 a.m.** Continental Breakfast sponsored by **LexisNexis®**  
Exhibitors, Ingenious Bar, and Networking

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**9:00 a.m. – 9:05 a.m.** **Welcome and Opening Remarks (Room 106)**  
**Kathleen Erin Cullin**, C.S., *Wallbridge, Wallbridge*  
**Barbara Hicks**, *Hicks & Hicks Professional Corporation*

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## OPENING PLENARY

**9:05 a.m. – 10:00 a.m.**

### **The T-Shaped Lawyer: Embracing New Skill-Enhancing Models to Become Tomorrow's Lawyer Today (Room 106)**

Nowadays, legal expertise isn't enough. With such rapid changes in the legal profession, lawyers must have abilities in many disciplines coupled with a strategy and vision for the future. This is what it means to be a T-shaped lawyer. It means building on the traditional lawyer skillset with a broad understanding of the technology and finance management that goes into owning and operating a law firm. It means developing strong interpersonal skills, providing cost-effective services, and being responsive to an increasingly demanding client base. Put yourself on the path to success in today's marketplace. Become a T-shaped lawyer today.

**Fernando Garcia**, Vice President, Legal, Compliance and General Counsel, *Cargojet*

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**10:00 a.m. – 10:30 a.m.** Coffee and Networking Break sponsored by **TitlePLUS®**  
Exhibitors, Ingenious Bar, and Networking

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## **COMPLIMENTARY TREASURER'S DINNER**

This always-popular event fills up fast! On Monday, June 3, join your colleagues in the elegant Osgoode Hall Restaurant for delicious food and great company before the big day.

# AGENDA

Please note:

- Registrants attend either Seminar A, B, C or D at each time. Seminar D workshops are not webcast.
- Workshops are for in-person conference attendees only and are a first-come, first served basis. Space is limited.
- Speaking times include 10 minutes for a question and answer session.
- Video recordings of the workshops will be available post-program.
- Live webcast sponsored by **Thomson Reuters®**.

## CONCURRENT BREAKOUT SEMINARS

### BREAKOUT ONE 10:30 a.m. - 11:20 a.m.

#### SEMINAR A: Room 106

##### Developing a Niche Practice Area

So, you want to take your practice to the next level. Have you considered carving out a niche? In this era of specialization, more and more lawyers are researching and developing a niche area of practice based on personal interest and market needs. Our panel has the first-hand experience to provide tips on how to find the ideal niche for you, with advice on promotion and marketing, the economic challenges, and finding a mentor.

Moderator: **Barbara Hicks**, *Hicks & Hicks Professional Corporation*

Panellists: **Erin Lepine**, *Nelligan O'Brien Payne LLP*  
**Allan Oziel**, *Oziel Law*  
**Sean Robichaud, C.S.**, *Robichaud's Barristers & Solicitors*

OR

#### SEMINAR B: Room 107

##### New Research Tools for Lawyers and How to Adopt Them

Your core competencies include conducting legal research, providing legal advice and opinions, and drafting documents. Any help you can get when providing these competencies greatly enhances your value. Our presenters show you how using artificial intelligence, data analysis, and other tools can translate into services with less cost and greater efficacy, as well as better advice to your client. Learn what research tools are available in the market, how they can be integrated into your practice, and how to use your skills as a lawyer to evaluate the data and the results.

**Mona Datt**, *Founder, Loom Analytics*

**Colin Lachance**, *Interim General Manager - North America, vLex.com*

OR

## SEMINAR C: Room 104 A/B/C

### Tips for Maximizing Work/Life Balance

Solo and small firm lawyers face competing priorities every day, and it seems every week brings another round of the same. The stress of this can lower defences and leave you feeling mentally and physically drained. How do you take care of yourself while still taking care of your clients and your practice? How do you avoid the isolation that often goes hand in hand with a solo or small firm? Get tips on how to operationalize a strategy from a clinical and personal perspective to both institute balance in your life and maximize your abilities.

Moderator: **Jennifer Quito**, Counsel and Team Manager, Practice Supports and Resources, *Law Society of Ontario*

Panellists: **Orlando Da Silva**, *Ministry of the Attorney General*  
**Doron Gold**, *Homewood Health*

OR

## SEMINAR D: Room 104 D

Workshops are for in-person attendees only at the conference and are on a first-come, first served basis. Space is limited. Video recordings will be available post-program.

### How to Excel When Dealing with Litigation Practice Issues: A View from the Bench

There are many issues that arise again and again in a litigation practice, and likely you've thought that a judicial perspective would shed some light on how to deal with them. This workshop is your chance to hear directly from judges as they share insights on managing your clients through settlement and court proceedings, dealing with self-represented litigants in the litigation process, weighing considerations when bringing conflicts of interest motions, and more. This small group setting is a perfect opportunity to gather strategies on how to be a more effective advocate.

Moderator: **Kathleen Erin Cullin, C.S.**, *Wallbridge, Wallbridge*

Panellists: **The Honourable Lucille Shaw**, *Superior Court of Justice*  
**The Honourable Nyron Dwyer**, *Ontario Court of Justice*

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**11:20 a.m. – 11:25 a.m.** Room Change

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## BREAKOUT TWO 11:25 a.m. - 12:15 p.m.

### SEMINAR A: Room 106

#### Don't Fail to Plan or Plan to Fail: Grow Your Law Firm

Planning to grow your firm can be a daunting task, which is why it's often a neglected one. But a failure to plan is a plan to fail; the effects on the viability of your practice can be adverse and long lasting. To find the right plan, you need to consider a number of factors, including how to determine a realistic budget, whether to contract out or hire employees, and how to attract the right people for your team. Learn to design a plan that fits your firm today, with an eye on future growth and success.

**Andrew Swales**, *Next Generation Legal Accounting*

**Joyce Thomas**, *Thomas Litigation*

**Karissa Ward**, *Wards Lawyers PC*

OR

### SEMINAR B: Room 107

#### Cybersecurity: Protect Your Law Firm

Why is it so important to have a cybersecurity strategy? How do you implement this strategy into your practice? And what steps do you take if a security incident does occur? Our experienced panellists answer these questions and more, along the way offering practical advice that takes into account the particular resources of the solo and small firm lawyer. You learn how to meet your professional responsibility obligations, reduce your risk, and effectively manage your response if an incident occurs.

**Imran Ahmad**, *Blake Cassels & Graydon LLP*

**Kevvie Fowler**, Partner, National Cyber Resilient Leader, *Deloitte*

OR



## EXHIBITORS

Everyone could use a helping hand.  
Stop by our Exhibitor Forum to discover  
products and services that can take your  
practice to the next level!

(See Exhibitor list on page 13)



## SEMINAR C: Room 104 A/B/C

### How to Run a Home-Based Practice

There are a variety of reasons that make operating a home-based practice an ideal solution for many—but there are also particular challenges. Our presenters explain how to carve out appropriate space for a home-based practice, including strategies to focus your time and set boundaries. They also go over the benefits of the various virtual office packages that can help meet your professional obligations when running an office from your home. With careful planning, you too can make this arrangement work for you.

**Phil Brown**, Counsel, Practice Management, Practice Supports and Resources, *Law Society of Ontario*

**Valerie Dye**, Barrister and Solicitor

**Maanit Zemel**, Partner, *Zemel van Kampen LLP, Technology Law | Litigation*

OR

## SEMINAR D: Room 104 D

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### Winning at Strategic Networking

This won't come as news to anyone, but networking is a vital skill. Your contact list needs to be filled with a variety of people: those who can assist you with business development and referrals; those who can give you advice on running your business, or handling ethical dilemmas and substantive questions; those who can help you hone your legal tools when new challenges crop up; and more. Solo and small firm lawyers face unique challenges in building these important relationships. Our workshop leaders explore effective and practical ways for you to make new connections and develop your network to build a more satisfying and successful practice.

**Erin Cowling**, *Cowling Legal/Flex Legal Network*

**Charlene Theodore**, *Ontario English Catholic Teachers' Association*

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**12:15 p.m. – 1:15 p.m.**

Lunch sponsored by **Apogee IT Services Canada**  
Exhibitors, Ingenious Bar, and Networking

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## BREAKOUT THREE 1:15 p.m. - 2:05 p.m.

### SEMINAR A: Room 106

#### Marketing Plan Strategies to Make Your Law Firm Stand Out

A successful business requires a business plan, and a successful business plan includes a comprehensive marketing strategy. Unsure where to begin? Our presenter can help. She provides you with tips and tools to develop a plan that adapts as your practice grows, illustrating why it's critical to have a career-long strategy. You learn how to build and expand a website and how to sustain a social media presence, plus explore a variety of other marketing tools you can use to promote your skills and content and—ultimately—make your law firm stand out.

**Sandra Bekhor**, *Bekhor Management*

OR

### SEMINAR B: Room 107

#### Cannabis in the Workplace (10 m EDI )

Since the recent decriminalization, the signs of cannabis use are more commonplace. What do you do when you spot them at work? Large firms or corporations have HR departments to draw up policies, but as an employer in a solo or small firm, the responsibility falls squarely on you. How should you deal with employees who use cannabis for medicinal purposes? What steps do you take when an employee uses cannabis during lunch and returns to the office? Our presenters take you through the framework of the legislation and go over your legal obligations concerning accommodation, health and safety, and terms of employment. You leave with the guidance you need to create and enforce policies for your workplace.

**Sean Bawden**, Director, Legal (Employment and Litigation), *Canopy Growth Corporation*  
**Jonquille Pak**, *Whitten & Lublin Professional Corporation*

OR



Have a question in mind? Look to the people at our Ingenious Bar for the answer! This year's representatives are from *Coach and Advisor Network (CAN)*, *Homewood Health*, *Lawyers' Professional Indemnity Company (LAWPRO®)*, *Law Society Referral Service*, *Practice Management Helpline (PMH)*, *Practice Review Department*, *Law Practice Program (LPP)* | *Ryerson University*, *Spot Audit*, and *TitlePLUS®*.

## SEMINAR C: Room 104 A/B/C

### **Intake, Contingency, and Fulfillment Systems to Enhance Your Practice**

Do you have the proper systems in place for client intake? Once you are retained, what steps do you follow to ensure you're protecting your client's interests and satisfying their legal needs, up to and including the matter's conclusion? Our presenters can show you how to effectively manage these critical processes. First, they go over online intake forms, as well as client identification, engagement, and non-engagement letters. Next, they provide contingency planning strategies, from powers of attorney to file organization for a seamless transition in case of an unforeseen event. Finally, they detail procedures that help you to close a client's file successfully—a necessary step to a happy client and future referrals.

**Lee Akazaki**, *Gilbertson Davis LLP*

**Bobby Brykman**, *Brykman Lefler Lawyers, Practicing in Association*

**Kevin Cheung**, *Fleck Law*

OR

## SEMINAR D: Room 104 D

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### **The Power of Vision: Three Keys to Creating the Practice (and Life) You Love**

Everyone wants a career they love. Many of us start out with goals and dreams only to find ourselves running up against facts and circumstances in the “real world.” But the real world can be more forgiving than one realizes! Join our workshop leader in this dynamic session and learn the essential keys to tune into your vision, which will give you the ability to design the law practice, career, and life you love. Learn strategies and skills to use when encountering doubt, fear, or worry, and a technique to turn around self-sabotaging thoughts. The career you have always dreamed of is within reach!

**Eve Wahn**, *Barrister & Solicitor*

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**2:05 p.m. – 2:10 p.m.**    *Room Change*

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## BREAKOUT FOUR 2:10 p.m. - 3:00 p.m.

### SEMINAR A: Room 106

#### **A Primer on Earning the Business of Large Organizations**

Large organizations, when they're in search of legal services, present a great opportunity for your practice. But how do you tailor your business pitch to attract these clients? The right strategy can open doors for solo and small firms in a variety of practice areas, and our presenters provide you with the framework to get started. Learn how to develop your marketing strategy, target the type of client you want, and manage the sales pitch and sales cycle. By leveraging the advantages of a small firm's responsiveness, you can successfully work with a large organization and continue to meet its needs, which will put your practice in a position to earn the next contract.

**Imdad Ali**, *Bank of Montreal*

**Peter Carayiannis**, *Conduit Law*

**Sanjay Kutty**, *Spark LLP*

OR

### SEMINAR B: Room 107

#### **Using Business Metrics to Understand and Grow Your Practice**

Metrics are a quantitative way to measure how your business is performing. But too few legal professionals take advantage of them. Solo and small firms should be tracking many indicators—such as financial, productivity, client, and marketing—to determine how to make processes and systems more efficient, how to be more responsive to the client base and potential clients, and how to allot time and financial resources. Our presenters provide you with insights on the analysis and utilization of quantitative data so that you can make sound business decisions that move your practice forward.

**Chuck Gastle**, *Bennett Gastle Professional Corporation*

**Stephen Mabey**, *Managing Director, Applied Strategies Inc.*

OR

## SEMINAR C: Room 104 A/B/C

### Increasing the Success of Your Firm through Diversity (50 m EDI e)

A diverse and inclusive workplace can help your law firm achieve a number of goals. When you draw on diverse backgrounds, your talent pool is bigger and you have a better chance to attract and employ the right clients and staff. In turn, this creates a more innovative, creative atmosphere and enhances your firm's reputation, which leads to a more successful and profitable firm as well as higher client and staff satisfaction. Hear about ways to increase diversity in your workplace, starting with the resources and supports that are available to better understand these issues and workplace initiatives that you can implement to help achieve a more diverse firm.

Moderator: **Marian MacGregor**, Executive Director of the Centre for Human Rights and Equity and Inclusion, *York University*

Panellists: **Omar Ha-Redeye**, *Fleet Street Law*  
**Laleh Moshiri**, *Borden Ladner Gervais LLP*

OR

## SEMINAR D: Room 104 D

Workshops are for in-person attendees only at the conference and are on a first-come, first served basis. Space is limited. Video recordings will be available post-program.

### The E-mail Warrior: How to Clear Your Inbox and Keep It That Way!

It doesn't take long for an inbox to go from full to overwhelmingly full. Are you looking for techniques to take back control? You're not alone. Our workshop leader goes over proven strategies that will enable you to handle your incoming emails and process them more efficiently. Find out how to implement a daily plan to streamline your tasks and reduce stress, while also freeing up time to focus on other important aspects of your practice.

**Frances Biernacki**, *Clear Concept Inc.*

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**3:00 p.m. – 3:30 p.m.** Coffee and Networking Break sponsored by **TitlePLUS®**  
Exhibitors, Ingenious Bar, and Networking

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## CLOSING PLENARY

**3:30 p.m. – 4:30 p.m.**

### **Simple Tech Solutions to Accelerate Your Practice (Room 106)**

Technology now exists to help you at every stage in the life cycle of a client file, right from the moment you open it. As you organize the file, prepare documents, and manage communications with your client and others, you can choose to use a tool for each task. Billing? Yes, there's a tool for that too, and one for when you close the file. How do you decide which tech tools will work for your practice? Our presenters share with you straightforward, achievable ways to utilize the latest in technology with one goal in mind—to simplify your tasks and make your practice run more efficiently and effectively.

**Jennifer Reynolds**, *Fresh Legal*

**Natalie Worsfold**, *Counter Tax Lawyers Professional Corporation*

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**4:30 p.m.** End of Program

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**4:30 p.m. – 6:00 p.m.** Cocktail Reception

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### **COMPLIMENTARY PROFESSIONAL HEADSHOTS**

Make sure your first impression is a great one! Visit our on-site photographer to get your professional headshot today.

First come, first served on program day. Sign-up begins at 7:30 a.m. Arrive early to reserve your spot.

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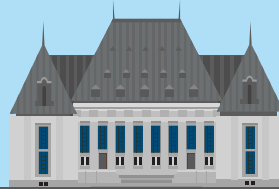
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