

# BUILDING & MANAGING YOUR LEGAL BUSINESS



The legal services sector is becoming ever more competitive as the stakes continue to grow. This forum is geared towards improving realization rates by focusing on core objectives and strategies and how to develop the necessary capabilities to achieve these targets. An enviable roster of speakers will cover the most topical issues for law firms as well as in-house legal departments, including:

- Going global – options and hot spots
- Strategic planning – designing a framework for the future
- Mega firms vs. strategic alliances
- Minimizing costs – building labour efficiencies
- Increasing profitability in a robust environment
- Productivity via technology
- Taking care of number one – your client
- Marketing with new twists
- Addressing generational differences to engage staff
- Bulletproofing your legal talent
- Managing knowledge in daily practice

*and much more...*

Marketing Partners

**LAW TIMES**

**CANADIAN Lawyer**

July 10 – 11, 2007  
St. Andrew's Club and  
Conference Centre  
150 King Street West, Toronto

## PROGRAM CO-CHAIRS

Gavin Birer  
*Founder*  
*Legalwise*

Karen Bell  
*Counsel*  
*Karen Bell LLB*

## KEYNOTE ADDRESSES

Doug Robbins  
*President*  
*Robbinex Inc.*

Matthew G. Shaw  
*Attorney*  
*Neville Peterson LLP, NY USA*

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Dear Colleague:

Today's legal practice climate presents very high stakes where potential strong rewards are paired with unprecedented pressures and risks. In order to gain competitive advantage, law firms and legal departments must reach beyond their traditional boundaries and consider innovative ways in which to better serve their clients, who are increasingly global and sophisticated in scope and aspirations. The pressure to drive down costs while improving profitability has never been more intense. Against this backdrop, lawyers are expected to continually strive for a more client-centric approach with the result being extreme competition for top talent.

This *Insight* conference program is about **BUILDING & MANAGING YOUR LEGAL BUSINESS** better! The conference will bring together forward-looking perspectives from business and legal professionals who have first hand experience in leveraging the opportunities and meeting the challenges lawyers face. The conference topics are of interest to all lawyers – whether in private practice or in-house.

A superb roster of speakers will address the following topics over the course of two value-packed days:

- Setting the strategic framework for the long term
- Controlling spending and costs
- Increasing productivity through a blend of options
- Tending client relations to control risk and build business
- Bullet proofing your legal talent
- Building on generational and cultural diversity
- Improving staff productivity and retention
- Leveraging the knowledge base – mining, retrieving and sharing

Discover alternative approaches to managing old and new issues, and hear about solutions that work. We ask you to join us for what promises to be a very valuable summer program.



Gavin Birer  
Founder  
Legalwise



Karen Bell  
Counsel  
Karen Bell LLB

## WHO SHOULD ATTEND

- Managing Partners
- Firm and Practice Managers
- General/In-house Counsel
- Legal Department Directors and Managers
- Head, Human Resources | Business Development | Law Firm Marketing
- Executive Directors
- CFO's
- COOs

TUESDAY JULY 10 |, 2007

8:15 | 8:50

### Registration and Continental Breakfast

8:50 | 8:55

### Welcoming Remarks from Insight Information

8:55 | 9:00

### Chair's Opening Remarks

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**Gavin Birer**

*Founding Partner  
Legalwise*

9:00 | 9:30

OPENING KEYNOTE ADDRESS

### Global Expansion – Are You Ready?

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**Doug Robbins**

*President  
Robbinex Inc.*

9:30 | 9:45

### Networking Coffee Break

9:45 | 11:00

PANEL DISCUSSION

### Strategic Planning – Framework for the Future

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**Gavin Birer**

*Founding Partner  
Legalwise*

**Richard B. Raymer**

*Managing Partner  
Hodgson Russ LLP*

**Daniel Shap**

*Partner  
Gardiner Roberts LLP*

**Michael P. Whitcombe**

*Senior Partner & Vice-Chair, National Business Law Practice  
McMillan Binch Mendelsohn LLP*

- Trends on the horizon and implications for Canadian legal practices
- Comments on the changing marketplace and sophistication of clients
- What preparation should be done to ride the trends – adopt a framework

11:00 | 11:45

### Controlling the Legal Spend

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#### *Where Can You Find the Margin Without Sacrificing Quality?*

**Michael P. Whitcombe**

*Senior Partner & Vice-Chair, National Business Law Practice  
McMillan Binch Mendelsohn LLP*

- Law Firms as Key Suppliers (perception or reality) - How do legal firms price their services
- Discussing the market for commoditized vs specialized legal services
- The growing US law firm influence on Canadian transactions
- Negotiating special fees arrangements and RFP's
- Integrated project teams and other sectors for cost saving collaboration on major projects
- Retaining firms not lawyers - what law firms can do

11:45 | 12:45

### Networking Luncheon

12:45 | 1:45

CASE STUDIES

### Mega Firms vs. Strategic Alliances

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#### *Where's the Payoff?*

**David Corbett**

*Firm Managing Partner  
Fasken Martineau DuMoulin LLP*

**Richard Wozenilek**

*Partner  
Keel Cottrelle LLP*

**Kenneth Kallish**

*Partner, Minden Gross LLP  
Chairman, Meritas*

- Improve productivity and reach through strategic alliances: UK, US, and multinational
- Implementing convergence programs
- Collaborative sourcing vs. competitive sourcing of client leads
- Examining models that work: foreign offices, affiliations or partnerships

1:45 | 2:30

PANEL DISCUSSION

### Global Challenges:

### Need for Offshoring and Outsourcing

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#### *Minimizing Costs – Building Labour Efficiencies*

**Gavin Birer**

*Founding Partner  
Legalwise*

**Sergio R. Karas**

*Founding Partner  
Karas & Associates; Member – Visalaw International*

**Stephen Taran**

*President  
Taran Virtual Associates Inc.*

- Types of competition vying for client market share in the legal world
- Views from afar – what is happening globally? Countering the India/China tiger
- Strategies to plan for and contain costs in an ever demanding marketplace
- Options for quality control – an HR requirement
- Global mobility and risk factors

2:30 | 2:45

### Networking Refreshment Break

2:45 | 3:30

### Increasing Profitability in a Robust Environment

**Richard G. Stock**

*Partner  
Catalyst Consulting*

- Setting targets – lifestyle vs. workstyle
- Increasing productivity – criteria to adjust hourly rates
- What clients dislike about hourly rates
- How to accommodate clients in an increasing cost environment
- Re-building leverage in the aging firm
- Reducing overhead costs by 50%

3:30 | 4:30

### Technology to Increase Productivity

#### *Is it a Panacea or Pandora's Box?*

**Andrew Dawson**

*Senior Director Product Marketing & Alliances  
Aderant*

- Overview of key functionality and enhancements to productivity
- Are you using technology to its fullest extent?
- Leveraging technology to decrease costs and increase productivity
- Utilizing scheduling, on billable platform
- Key information to utilize to increase efficiency now
- Leveraging junior staff's time to increase billable hours

4:45

### Conference Adjourns for the Day

## WEDNESDAY JULY 11, 2007

8:15 | 8:55

### Continental Breakfast

8:55 | 9:00

### Co-Chairs' Opening Remarks

**Karen Bell**

*Counsel  
Karen Bell LLB*

**Gavin Birer**

*Founding Partner  
Legalwise*

9:00 | 9:45

*KEYNOTE SPEAKER*

### Latest Legal Trends in the U.S.A.

**Matthew G. Shaw**

*Attorney  
Neville Peterson LLP, NY USA*

9:45 | 10:00

### Networking Coffee Break

10:00 | 11:00

### Tending Client Relations

#### *A Priority in Your Risk Management Strategy*

**Murray Aust**

*Senior Counsel  
Royal Bank of Canada*

**Karen Bell**

*Counsel  
Karen Bell LLB*

- Identifying the types of risks involved – how to see them coming and how to keep them at bay
- Embracing a 'Know Your Client' ethic – answering the 'who', 'what' and 'how' questions
- Understanding your role as advisor – what are the unusual risks to watch out for?
- Managing and exceeding client expectations – the required skills and the secrets to success
- Implementing the commitment to client service – a foundational element in your risk management strategy

11:00 | 12:30

*PANEL DISCUSSION*

### It's Not Rocket Science

#### *New Twists on Legal Marketing Basics*

**Suzanne Godbehre**

*Director of Marketing  
Cassels Brock & Blackwell LLP*

**Kelli Wight**

*National Director of Marketing  
Miller Thomson LLP*

**Stuart Wood**

*Director, Marketing & Business Development  
Torys LLP*

- Defining and providing value – what do clients really want? How do you know you are hitting the mark?
- Planning, monitoring and measuring – why these three critical steps trip everyone up. What can you do to get and stay on track?
- Finding the right marketing mix – successfully and cost-effectively combining established practices and new trends for optimal results

12:30 | 1:30

**Networking Luncheon**

1:30 | 2:15

**Embracing Generational Differences*****Avoiding the High Cost of Staff Disengagement*****Adwoa K. Buahene**

*Managing Partner  
n-gen People Performance Inc.*

**Giselle Kovary**

*Managing Partner  
n-gen People Performance Inc.*

With four generations in the workplace – Traditionalists, Baby Boomers, Gen Xers and Gen Ys – there are four different sets of expectations, motivations and approaches to work.

- Explore generational motivations
- Tips and techniques to engage and retain Gen X and Gen Y associates

2:15 | 3:00

**Squeezing Water from a Stone, or Should We Say From Staff?****George J. Eydt**

*Partner  
Hodgson Russ LLP*

**Anita Lerek**

*President, General Counsel  
Advocate Placement Limited*

- Trends in hiring practices – maximizing efficiencies
- Determining types of staff for optimal value
- Ten principles of profitable fit
- Maximizing quality talent retention
- Perspectives on staffing from the USA

3:00 | 3:15

**Networking Refreshment Break**

3:15 | 4:00

**Avoiding and Dealing with Claims – Bulletproofing your Legal Talent****Donald J. Ross**

*Partner  
Gowlings Lafleur Henderson LLP*

- Identifying different protective insurance coverages
- Reputational risk – protecting your goodwill
- Balancing conflicting interests

4:00 | 4:45

**Managing Knowledge is the Pot of Gold*****Utilizing the Think Tank*****John Loosemore**

*Knowledge Management Consultant  
Blake, Cassels & Graydon LLP*

- Why Knowledge Management (KM) can increase time efficiencies
- Tips on centralizing and managing knowledge in a multi-office, multi-practice environment
  - creating and selecting materials
  - using existing resources
- Capitalizing on synergies between different practice areas and knowledge flows
- Encouraging collaboration internally and externally for retention of knowledge
- How to integrate and maintain KM momentum with designated KM leaders and compelling incentives

4:45

**Co-Chairs' Closing Remarks and Conference Concludes**

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Area of practice:

Company:

Business Address:

City: Province: Postal Code:

Telephone: [ ] Fax: [ ]

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Type of Business: #of Employees:

Registrant's Signature Required:

Signature

Date

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Regular Conference Price: \$1,695.00 + GST (\$101.70) = \$1,796.70

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