

## Legal Practice Management 2018 conference

### 09.00 Registration and coffee

#### 09.30 Welcome and opening address

*Simon Slater, chief executive officer, Pemberton Greenish*

#### 09.35 How can SME firms recruit and retain the best people?

- Competing with other firms and legal-resourcing businesses that offer higher salaries, more flexibility and better career opportunities
- How can you make your firm more enticing than any other?
- Engaging with the right people at the right level
- The challenges of recruiting for specific work types when the supply is low
- How might changes to the qualification route affect how people recruit into law firms?

*Brian Cullen, group chief executive officer, Jackson Lees*

#### 10.10 (Panel) Examining the best ways to resource SME firms to ensure future law firm sustainability

- The pressures the traditional law firm partnership model is facing and why it's not fit for purpose
- Which models will ensure future law firm sustainability?
- How do other firms structure their practice groups and allocate resources appropriately?
- What's the right balance of qualified and non-qualified staff?
- How much will resourcing be driven by paralegals or people from other qualification routes?
- How do we provide the best admin support for lawyers in our firm – technology or people or both?
- How can firms adapt the partnership model, structures and services with workforces that can be resistant to change?

*Chair: Simon Slater, chief executive officer, Pemberton Greenish*

*Edward O'Rourke, chief executive officer and partner, Ashtons Legal*

*Mary Bonsor, co-founder, F-LEX*

*Simon Goldhill, founder and director of strategy, Metamorph Law*

*Nikki Leatherland, head of HR, Peters & Peters*

#### 10.55 Slido session

### 11.05 Coffee break and elevator pitches from our suppliers and service providers

#### 11.35 Stream sessions

*Delegates may choose to attend one of the following two streams:*

##### **STREAM ONE**

**Law firm succession planning and the millennial generation**

- How much involvement do younger generations want in the operation, structure and growth of a law firm? How much motivation do they have for running a business?
- Encouraging them to get involved in planning and growing businesses
- Preparing young directors or partners for succession – what are the options or routes?
- What if your trainees don't want ownership or to be made equity partners? What's going to happen to the next generation? How is the top generation going to get out?
- How can you tie people in for peace of mind?
- How do you manage that cycle of development and plan for succession?

*Sara Duxbury, business psychologist, Carter Corson*

## **STREAM TWO**

### **Retaining your clients through delivering excellence in client service**

- Serving your clients at their convenience and not at the convenience of the provider
- Who are your clients? Do you really know who they are and what they want to buy?
- Building better relationships and exceeding expectations
- Building the right level of service around your products
- Demonstrating and measuring quality service
- Training your staff in people skills and persuasion to be able to engage with the client and manage their expectations.

*Peter Ambrose, director, The Partnership*

## 12.10 **Stream sessions**

*Delegates may choose to attend one out of the following two streams:*

### **STREAM ONE**

#### **(Panel) Managing millennial career development and progression and changing attitudes to work**

- What do younger generations want in terms of career progression? Are they still aspiring to be partners?
- How are titles perceived by younger generations? How can you ensure your staff feel valued regardless of title?
- Enticing millennials on the quickest route to partnership
- Offering alternative career paths
- Managing the millennial approach to work-life balance - what does this mean for the business?
- Engaging the modern workforce and creating the right environment for them to develop and your business to thrive.

*Chair: Simon Slater, chief executive officer, Pemberton Greenish*

*Paul Blake, chief operating officer, DQ Advocates*

*Malcolm Head, co-founder and chief executive officer, The Head Partnership*

*Polly Jeanneret, practicing solicitor with Halebury and LPM's resident HR guru*

*Emma Sell, practice manager, Brahams Dutt Badrick French*

### **STREAM TWO**

#### **Adopting a culture of change and managing lawyers' resistance to change - a change journey case study**

- Coping with the accelerating pace of change in the legal market
- How can firms drive change with workforces that can be very traditional in mindset?

- Influencing decision makers to think differently and secure and maintain engagement on your change journey
- Aligning your firm's culture and values and adapting or changing its culture
- Preserving your uniqueness and USP during times of change
- Changing the strategic direction of a traditional law firm.

*Sean Stuttaford, chief operating officer, Thompson Smith and Puxon*

## 12.40 Lunch

## 13.40 Slido session

## 14.00 Facilitated roundtable discussions

*Two 30-minute sessions – delegates may choose any two out of the following:*

### **ROUNDTABLE ONE**

#### **Ensuring your firm is GDPR compliant**

- Six steps to GDPR compliance
- What have you forgotten? A data-protection checklist
- Training your workforce on GDPR and ensuring firm-wide compliance
- Ensuring you remain compliant after May 2018
- GDPR in practice - workplace scenarios to test and improve your knowledge.

*Beth Sayle, head of risk and compliance, Rliance*

### **ROUNDTABLE TWO**

#### **The GDPR: An opportunity not a curse for firms**

- Do you have a plan for GDPR compliance yet? The latest findings are that just 45% of global organisations do and more than half (58%) are not fully aware of the consequences of non-compliance.
- If implemented correctly, the GDPR should be viewed as a business enabler rather than a block on innovation
- The GDPR should help you to get closer to your customers, drive innovative new services and increase revenue rather than be a regulatory barrier to your firm
- Take an in-depth look at how law firms can use the latest regulation to improve the service they deliver to their clients and streamline processes within the business.

*Mark Hodgkinson, professional services director, Nasstar*

### **ROUNDTABLE THREE**

#### **Managing increasing compliance obligations - keeping up with the pace and scale of regulatory changes**

- An overview of the changing regulations with regards to AML and the implications for your firm
- Utilising technology and systems to keep on top of regulatory change
- Ensuring others toe the line and getting everyone on the same page
- Best practice case study – embracing technology for compliance

*Martin Russell, head of professional service sales, Encompass*

### **ROUNDTABLE FOUR**

#### **Using metrics and technology to support and drive behavioural and cultural change**

- Aligning metrics with the behaviours that you want to change
- The key attributes of metrics that will drive action

- Putting theory into practice – firm case studies around: alignment of KPIs, balanced measures, predictive indicators, monitoring risk and measuring marketing

*Graham Moore, managing director, Katchr*

### **ROUNDTABLE FIVE**

#### **Using digital-marketing technology to build a trusted brand, increase pricing transparency and provide greater choice for connected consumers**

- Three digital steps to the modernisation of legal services: exploring the steps law firms can take to prepare for digital-marketing changes
- Exploring how consumer behaviours and needs and the power of technology are permanently changing the way people buy legal services
- Using technology to increase pricing transparency, manage additional industry compliance and improve access to information about law firms
- What is a content-led digital strategy and why does SEO and organic search matter to law firms?
- How can law firms translate trust in brand to the online world and then translate marketing engagement into business growth?

*Kate Briscoe, co-founder and chief executive officer, JustBeagle*

### **ROUNDTABLE SIX**

#### **The cloud approach to compliance: building secure solutions in the cloud and core guidelines to stay compliant**

- Private v public cloud: what's the difference?
- Scope of responsibility (i.e. cloud vendor v customer)
- Cloud security concepts
- Challenges in achieving ISO2700 and GDPR compliance
- Continuous compliance

*James Letley, CTO, LayverV – a Pulsant company*

### **ROUNDTABLE SEVEN**

#### **Agile, flexible, remote and virtual working - how can traditional firms adapt to accommodate a more modern way of doing business?**

- Reducing fixed costs, enabling growth and meeting client and lawyer demand – a win-win solution for SME firms?
- How can firms adopt this model or a hybrid version and make it work for them?
- Handling partner reluctance to accept flexible and agile working
- Client confidentiality issues and other areas of risk
- Tools and technologies that enable firms and staff to work virtually and remotely

*Derek Fitzpatrick, general manager, EMEA, Clio*

### **ROUNDTABLE EIGHT**

#### **Emerging risks for the firm of the future and their impact on PII**

- Back to the future – in the new world of agile working, how do we avoid regressing back to our old habits of working in silos?
- The robot revolution – can we trust technology and where does liability fall?
- Acquiring or selling – two sides of the same coin? When expanding your business, what skeletons could be in the closet?

- Regulation restriction – in a world of increasing regulation, what onus is on you to ensure you cover all the bases? Eg GDPR

*Paddy Synnott and Billy Warner, client advisors, Miller Insurance Services*

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## **15.05 Coffee break and elevator pitches from our suppliers and service providers**

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### **15.35 (Panel) Keeping up with advancements in technology and using technology that works for your clients and the firm**

- What are the latest IT developments, not just in the legal market but that the legal market can take advantage of?
- What effect could these developments have on your business?
- Using technology that will work for SME firms and their clients
- Investing in IT and upgrading your systems and infrastructure, because clients are more savvy about which systems your firm is using
- How can SME firms keep up to date with innovation in IT?

*Chair: Jane Pritchard, founder and consultant, elawvate*

*Adam Bullion, head of marketing and product, InfoTrack*

*Peter Carr, head of IT, partner, Fisher Jones Greenwood*

*Eddie Harrison, head of business optimisation, Lowell Solicitors*

*Alex McPherson, partner and co-founder, Ignition Law*

*Richard Tromans, founder, Artificial Lawyer and Tromans Consulting*

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### **16.15 Sustaining and growing your firm in an increasingly competitive landscape**

- What stops law firms growing?
- What is the right size for a firm to enable it to compete, be sufficiently agile and adapt to change?
- How can firms retain and grow their market share?
- Identifying new profitable areas or sectors
- How do you move into a new area or sector, what steps do you take and what are the implications, risks and pitfalls?
- What other income opportunities are out there for law firms?

*Bernard Savage, director, Tenandahalf*

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### **16.55 Thank you and closing address**

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## **17.00 Close of conference**

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