

# LPM

LEGAL PRACTICE MANAGEMENT



## ONE-DAY CONFERENCE

### FOR PRACTICE MANAGEMENT LEADERS IN SME LAW FIRMS

Over 100 practice managers, directors, operational directors and heads of finance attend from SME firms



The Institute of  
Legal Finance  
& Management



Proudly announcing the launch of  
LPM Practice Excellence Award, in  
partnership with the Institute of Legal  
Finance and Management (ILFM)

### LPM SOUTH

07.02.19

The Royal Society, London



### LPM WEST

24.04.19

DoubleTree by Hilton, City Centre, Bristol



### LPM NORTH

15.05.19

The Met Hotel, Leeds





## AGENDA



**BERNARD SAVAGE,**  
director,  
Tenandahalf



**LUCY PALMER,**  
HR director,  
Stephens  
Scown



**GARY GALLEN,**  
founder and  
CEO, radar

**09:00-09:45 Breakfast and registration**

**09:45-09:50 Chair's opening remarks**

*Rupert Collins-White, LPM*

**09:50-10:10 Delegate ice breaker and speed networking**

Including an introduction to our first ever practice management awards, in association with the ILFM  
*Rupert Collins-White, LPM*  
*Richard Hill AILFM, executive council, trainer, ILFM*

**SESSION ONE:  
INDUSTRY CHANGE AND THE CLIENT**

**10:10-10:30 Morning keynote:  
How to charge what you're worth and get it**

Are your fee earners under-estimating, discounting or over-servicing clients and therefore not getting paid what they're truly worth?  
*Vanessa Ugatti, The True Worth*  
*Expert and author of Amazon best-seller True Worth*

**10:30-10:50 What technologies are changing the shape of legal services?**

Early results from LPM's annual Legal IT landscapes research revealed  
*Rupert Collins-White, LPM*

**STREAM SESSIONS - DELEGATES WILL PICK ONE STREAM TO ATTEND**

**10:50-11:20 Stream 1  
What lessons can be learned from outside the legal sector to improve your clients' experience?**

- What can law firms learn from retail and online businesses about client engagement?
- How failing to understand your customer experience is losing you money
- Designing your shop window: service-focused ways to differentiate your firm
- Do law firms understand how to manage business development?  
*Bernard Savage, director, Tenandahalf*

**10:50-11:20 Stream 2  
How new firms in the market are revolutionising the way clients seek legal advice**  
*Gary Gallen, founder and CEO, radar*

**11:20-11:50 Networking and refreshments break**

**SESSION TWO:  
FINANCE FUTURES - DELEGATES WILL PICK ONE STREAM TO ATTEND**

**11:50-12:20 Stream 1  
Panel: Mergers and consolidation**

- Will this be the only viable way to invest in and grow your firm?
- To what degree will SME firms engage in consolidation over the next five years?
- What are the criteria for a successful merger?
- What are the alternative ways to finance growth?  
*Lead by: Kayli Olson, editor, LPM*  
*Simon Goldhill, founder and director of strategy, Metamorph Law*  
*Andrew Roberts, director, Ampersand Legal and chairman, Association of Law Firm Merger Advisers*

**11:50-12:20 Stream 2  
Are law firms in denial about their profitability?**

- Managing cashflow: are your partners treating your accounts like a bottomless pit of money?
- Why a strong managing partner



AGENDA



**TIM NASH,**  
CEO,  
Edwin Coe

needs to listen to the finance agenda

- Practical ways of equipping your employees with the right kind of financial knowledge

*Tim Nash, CFO, Edwin Coe*

**12:20-13:20 Networking lunch**

**13:20-13:40 Afternoon keynote:  
Offering a leg up to SME customers  
- banking and raising finance**

- Early engagement with your bank is key to your success: here's how
- How to ensure your finances are in order - that difficult debt communication
- Have you thought about your succession planning and how can your banking partner help?
- Can recent listings be a source of capital-raising inspiration?

*Neil MacDonald, head of professional services, Metro Bank*

**SESSION THREE:  
TECHNOLOGY FOCUS - DEEP DIVE  
ROUNDTABLES**

Learn about vital law firm management issues in intimate roundtable discussions. Delegates will pick two 25-minute sessions to attend.



**SIMON GOLDHILL,**  
founder and  
director of  
strategy,  
Metamorph  
Law

**13:50-14:50**

**Roundtable 1  
Measuring the value of investment in technology**

- How can firms ensure their spend on tech is delivering a return on investment?
- How to build a strong business case for the technologies redefining how law firms work
- The value of technology, both for the firm and its clients
- How to measure both quantifiable and non-quantifiable benefits
- Forecasting and reporting the impact on the bottom line

*Host: Karen Butler, sales manager, Converge Technology Specialists*

**Roundtable 2  
Not all cloud technology providers are made equal - how to demystify the cloud and create an approach that is right for your firm**

- Demystifying the cloud: are you frequently hearing the term 'cloud' from legal technology vendors you speak to? Are they doing exactly what it says on the tin? We'll start with a discussion on cloud technology and the prevalence of 'cloud washing'
- Security and reliability are necessities for all businesses but particularly law firms handling delicate client information. How do cloud vendors store and process your client data?
- How to begin building a business case for cloud



**VANESSA UGATTI,**  
coach, trainer,  
speaker,  
author, The  
True Worth  
Expert

at your firm:

- What approach to cloud technology is right for your firm?
- How to prepare your team and get them excited for a cloud solution
- Learn how to communicate what the impact will be, with a focus on the benefits - better security, financial savings and reliability

*Host: Nick Francis, international growth, Clio*

**Roundtable 3  
Riliance risk outlook 2019**

- What regulatory changes are coming down the track in 2019?
- How will it affect firms?
- What actions need to be taken and when?
- How can Riliance support firms?

*Host: Beth Mayman, head of risk and compliance, Riliance*

**Roundtable 4  
Client collaboration**

- Why should law firms enable more client collaboration and how can they do so effectively?
- Which tools enable better responsiveness, efficiency and risk management?
- Examples from the legal market: pros, cons and impact - which could positively impact your practice?

*Host: Kirsten Maslen, head of SMF law proposition, Thomson Reuters*



**SARA DUXBURY,**  
business  
psychologist  
and head of  
commercial,  
Carter Corson



**MARY BONSOR,**  
co-founder,  
F-LEX



**NEIL MACDONALD,**  
head of  
professional  
services,  
Metro Bank

## AGENDA

### Roundtable 5

#### Approaching case management software development

- The profession's approach to technology is maturing – case management software is now an established part of many successful practices. How do firms approach the delivery and management of such software?
- What are the relative strengths and challenges of developing your own case management software from a toolkit versus buying software as a service?
- How you ensure your case management software and its embedded workflows and processes stay up to date with law, regulation and best practice
- How do you prioritise the purchase or development of new features and functions?

*Host: Robert Sanderson, managing director, Landmark Information Group/Ochresoft*

### Roundtable 6

#### How you can make hybrid cloud work for your practice

- Discover the benefits that hybrid cloud can bring to your organisation in terms of enhanced performance, productivity and bottom line
- SLA considerations around guaranteed uptime levels, resilience and service availability
- Meeting compliance and security requirements

*Host: Martin Palmer, enterprise business manager,*

*Pulsant*

### Roundtable 7

#### Inefficiency for opportunity: a toolkit on how to assess your record management process and security

- The roadmap to an optimal record management process: compliance, business interruption and GDPR considerations
- Let's improve cost inefficacy and save
- Look at your fingertips – that's research competency within reach
- The recipe for a tech-savvy practice: equal parts knowledge and organisation – but who's going to be your trusted partner?
- A quick MOT of your processes, followed by a personalised prescription for an optimised future

*Host: Natasha Rawley, the file queen, ADDS*

### Roundtable 8

#### Getting the most from flexible and mobile working

- Technology is enabling more flexible working, driven by a desire for a better work-life balance and pressure on office space
- Attract and retain the best talent and increase your catchment area
- What are the challenges specific to a regulated environment?
- How do we manage these changes properly?
- Discuss proposed solutions and opportunities

*Host: Sami Ahmed, senior sales manager, DPS Software*

### Roundtable 9

#### Case study: How to exercise data-driven decision making and improve performance

- Easier access to data can shine a light on hidden problems
- Using data to help inform strategic direction and increase your firm's operational and financial performance
- Engaging fee earners and the wider team through daily actionable information

*Hosts: Jamie Abrahams, IT and operations director, Harold Benjamin Solicitors  
Graham Moore, managing director, Katchr*

### Roundtable 10

#### The envision methodology – why and how, not just what

- CLM v CRM – client lifecycle management, not customer relationship management
- How to align platform change to strategic goals and organisational objectives, making it not just another software solution
- Why identifying restraining forces is vital to understanding what lies behind any change
- People don't buy what you do, they buy why you do it

*Host: Brian Coventry, CEO, Symphony*



## AGENDA

### SESSION FOUR: PEOPLE PERFECTION

#### 15:00-15:20 Engaging your employees through employee ownership

- Successfully attracting and onboarding new employees
- The importance of collaboration and communication as a driver for retention
- Fostering a culture of reward and recognition
- Identifying and developing future leaders
- Measuring success

*Lucy Palmer, HR director,  
Stephens Scown*

#### 15:20-16:10 Panel: The future workforce

- Graduate trainee programmes
- Including employee mental health and wellbeing in training programmes
- Training managers to deal with employee health
- Why the debate shouldn't be all about flexibility
- Can flexibility improve the bottom line?

• New platforms and inroads for legal advice

*Lead by: Sara Duxbury, business psychologist and head of commercial,  
Carter Corson*

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

#### 16:10-17:00 Drinks reception



## REGISTER NOW!

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