



NEW YORK
CITY BAR

SMALL LAW FIRM SYMPOSIUM 2021

November 11 | 8:30 am - 5:00 pm (In-Person or Virtual)
Reception from 5:00 pm - 6:30 pm (In-Person)

Presented by :
Small Law Firm Committee

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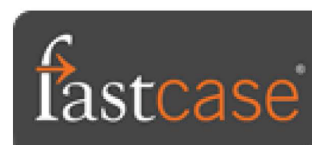
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Small Law Firm Center, at eguillergan@nycbar.org.

AGENDA *(at a glance)*

THURSDAY, NOVEMBER 11, 2021

8:30 am - 9:30 am	Registration/Networking Breakfast/Exhibit Hall
9:30 am - 9:40 am	Welcome
9:40 am - 10:40 am	Marketing Planning – Reach Your Goals by Reaching the Right Clients
10:40 am - 11:00 am	Coffee Break/Exhibit Hall
11:00 am - 12:00 pm	Track 1: Basics of Accounting, Bookkeeping, and the IOLA Account for Your Law Firm Track 2: Top Tech Tools
12:00 pm - 1:20 pm	Networking Lunch/ Exhibit Hall
1:20 pm - 2:20 pm	Track 1: Ethical, Business, and Other Challenges of a Small Firm Practitioner Providing General Counsel Services Track 2: How Lawyers Can Use Social Media to Build Their Brand
2:20 pm - 2:40 pm	Coffee Break/Exhibit Hall
2:40 pm - 3:40 pm	Track 1: Learn to use Fastcase 7 (A Free Member Benefit) Track 2: Start/Stop/Keep – Assessing COVID-Driven Behavior Changes for Long-Term Success
3:40 pm - 4:00 pm	Coffee Break/Exhibit Hall
4:00 pm - 5:00 pm	The Intelligent Practitioner: Using Modern Communication Principles for Success and Problem Solving
5:00 pm - 6:30 pm	Wine Reception and Giveaway (Giveaway at 5:15 pm)

THURSDAY, NOVEMBER 11, 2021

8:30 am - 9:30 am

Registration/Networking Breakfast/Exhibit Hall

9:30 am - 9:40 am

Welcome Remarks

Sheila Boston, President, New York City Bar Association

9:40 am - 10:40 am

Marketing Planning – Reach Your Goals by Reaching the Right Clients

Introduction: Precious Lewis, DC37 AFSCME AFL-CIO

Speaker: Christopher Anderson, Sunnyside Services, Ltd.

As law firm owners we know that we need to do "marketing." There is no shortage of vendors knocking on our doors to sell us some "marketing" with their mantra: "More leads. More calls. More money!" The problem is, nobody talks to us about the one thing we must have! A Marketing Plan. A succinct, written document that explains:

- What the marketing is supposed to do for us
- Why we find that important
- What we are going to measure
- What the Return on Investment is going to be

Most law firms practice spaghetti marketing. Throw it all on the wall in the hopes that some of it sticks! Learn how to link your marketing efforts to what you've decided you want the business to achieve. Come work through how to build a real marketing plan. In one brief talk, we will learn how to set goals, decide on metrics, design the plan ... and implement it. This will arm you to have real conversations with marketing firms, and to consume their services in a way that will get you results. This will help make you a better customer for them, and give you the tools to make your marketing much more profitable. We will cover: The big mistake most law firm owners make when making marketing decisions; How to build a marketing plan that achieves the financial, personal and professional goals of the owner; Attract more clients by solving more problems; Make sure you're sending the right message to the right prospective clients to maximize your marketing results; and Understand the 2 main jobs of marketing and make sure they're working for you.

10:40 am - 11:00 am

Coffee Break/Exhibit Hall

11:00 am - 12:00 pm

Track 1: Basics of Accounting, Bookkeeping, and the IOLA Account for Your Law Firm

Moderator: Asia Scarlett-Jones, Asia Scarlett-Jones Law PLLC

Speakers: Christine M. Fecko, General Counsel, the IOLA Fund of the State of New York and Martin F. Murray, Murray & Josephson, CPAs, LLC

CLE Credit: 1.0 Law Practice Management

Accounting for law firms can be more difficult than other businesses. Learn the nuts-and-bolts to keep your law practice running. Learn about the essentials of small business accounting and bookkeeping with a focus on law firms and client matters. We will also provide an overview of attorney trust accounts, which many attorneys need to handle as part of their practice when they are handling client funds. In addition to a review of the rules governing the use of escrow accounts, the IOLA Fund General Counsel will share answers to the most frequently asked questions in maintaining an IOLA account.

THURSDAY, NOVEMBER 11, 2021**Track 2: Top Tech Tools***Introduction: Karl Dowden, Karl Dowden Law**Speaker: Nicole Black, MyCase*

During this talk you'll learn about new and innovative tools that will help you streamline your law practice. By using these cloud technologies and mobile apps you'll be able to reduce the amount of time you spend running your practice and do more of what you do best—practicing law. By thoughtfully implementing these emerging technologies, you'll save time and money, making you a more effective and more responsive lawyer.

12:00 pm - 1:20 pm

Networking Lunch/ Exhibit Hall

1:20 pm - 2:20 pm

Track 1: Ethical, Business, and Other Challenges of a Small Firm Practitioner Providing General Counsel Services*Speakers: David L Cohen, David L. Cohen, PC; Chris Colvin, In The House LLC; Nydia Shahjahan, Nydia Shahjahan, Esq. P.C.; Anne Wolfson, Anne Wolfson PLLC**CLE Credit: 1.0 Professional Practice*

Not all companies can have full-time legal staff. While there are many advantages to internal lawyers, hiring in-house counsel may not always be possible. Moreover, hiring traditional outside counsel is often expensive and inefficient and can sometimes be ineffective as a substitute for in-house counsel. Hiring outsourced or fractional in-house counsel can be an elegant solution for certain companies. This panel discussion will address when, why, and how companies might choose to engage small firm practitioners to provide in-house counsel services and how small firm practitioners can position themselves to offer this service to their clients. The panel will go into detail the various logistical, ethical and business challenges and opportunities lawyers face when providing these services.

Track 2: How Lawyers Can Use Social Media to Build their Brand*Speakers: Joam Alisme, Alisme Law LLC; Guy Alvarez, Good2bSocial; Anne Marie McAvoy, Clovis Quantum Solutions LLC; Elektra Yao, Yao Law Group PLLC*

In today's digital landscape, brand identity is strongly linked to your social media presence. By building your own personal brand and establishing a social media following, you can enhance your reputation as an attorney, build trust with current and prospective clients, and generate new opportunities to build your practice. Whether you are a solo practitioner or an attorney at a large firm, social media is an important marketing strategy that helps you raise the profile of your firm while concurrently building your own brand in order to get more business. That said, most lawyers still struggle to implement effective social media marketing strategies that really drive new business.

2:20 pm - 2:40 pm

Coffee Break/Exhibit Hall

THURSDAY, NOVEMBER 11, 2021

2:40 pm - 3:40 pm

Track 1: Learn to use Fastcase 7 (A Free Member Benefit)

Introduction: Paul G. Garjian, Law Offices of Paul G. Garjian

Speaker: Erin Page, Fastcase

CLE Credit: 1.0 Professional Practice

Join us to learn how to use Fastcase7. Fastcase is the legal research platform provided free with your membership to the New York City Bar Association. The presentation covers basic Fastcase features with a focus on case law searches and statute searches in Fastcase 7.

Track 2: Start/Stop/Keep – Assessing COVID-Driven Behavior Changes for Long-Term Success

Introduction: Lewis Trippett, Higgins & Trippett LLP

Speakers: Mike Baldwin, PC Law|Time Matters, Kim Daniel, PC Law|Time Matters

COVID-19 forced a number of immediate behavior and process changes with little warning, impacting law firms, courts, clients and the legal industry as a whole. As clarity for what post-COVID realities will look like improves, we all now need to make important decisions about which of the changes we will maintain, which we will end, and possibly which new adaptations will need to be introduced.

These decisions are critical not just for the sake of business efficiencies, but because many standards and expectations have now changed across the board. The competitive bar has been raised in many areas, client preferences (or demands) have shifted, and previous levels of tolerance for pre-COVID behaviors may never return. Making the right choices now can help avoid limitations later – and may create significant opportunity for long-term firm success.

In this discussion we will focus on different types of decisions needing attention as we slowly emerge from the pandemic, a suggested framework for how to approach these critical decisions, and some case study examples of how we see real firms already benefitting from making the right post-COVID choices.

3:40 pm - 4:00 pm

Coffee Break/Exhibit Hall

4:00 pm - 5:00 pm

The Intelligent Practitioner: Using Modern Communication Principles for Success and Problem Solving

Introduction: Paul G. Garjian, Law Offices of Paul G. Garjian

Speaker: Claude E. DuCloux, LawPay

CLE Credit: 1.0 Ethics

Claude E. Ducloux, Board-Certified in both Civil Trial Law and Civil Appellate Law, by the Texas Board of Legal Specialization, and former Chair of the Texas Center for Legal Ethics will present a 60 minute power point presentation covering the following topics:

- The Art of Problem-Solving
- Most Common Grievances: Lack of Communication, Neglect, Fees, Misuse of Retainers
- Standard of Care for lawyer, ABA Model Rules

AGENDA

THURSDAY, NOVEMBER 11, 2021

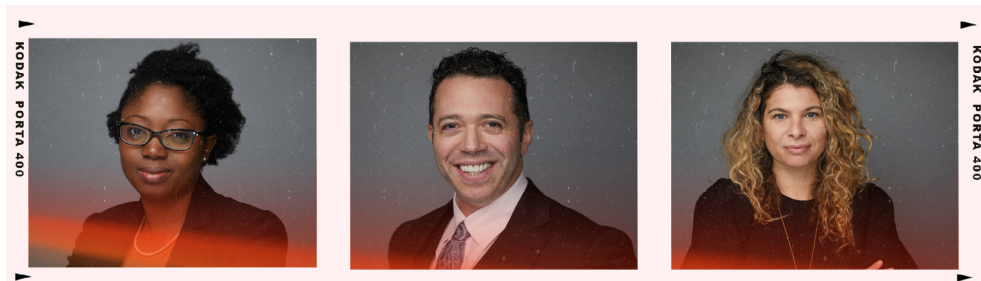
- Pro Active Communication for Success, Daily Rules and Habits
- Interviewing Skills and Contracting; Knowing Goals and Metrics
- Discovering and Handling Conflicts of Interest
- Privacy Policies and Handling Sensitive Information
- Handling Difficult Clients, and Difficult Opposing Counsel
- Avoiding Fee Disputes and Claims
- Handling Grievances
- Statistics on Malpractice Claims
- Correct Use of Client Trust Accounts

This will be via an annotated PowerPoint presentation, which will be made available to the participants. Presenter will answer questions, and provide follow-up to audience following the presentation. New York rules will be covered.

5:00 pm - 6:30 pm

Wine Reception and Giveaway

Attendees must be present to win. No purchase necessary. Official rules will be posted online http://documents.nycbar.org/files/Giveaway_Rules_2021.pdf



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