

14TH ANNUAL

SMALL LAW FIRM PRACTICE MANAGEMENT SYMPOSIUM '17

NOVEMBER 9, 2017 • 8:30 AM - 5:00 PM
NEW YORK CITY BAR ASSOCIATION
42 WEST 44TH STREET • NEW YORK, NY 10036



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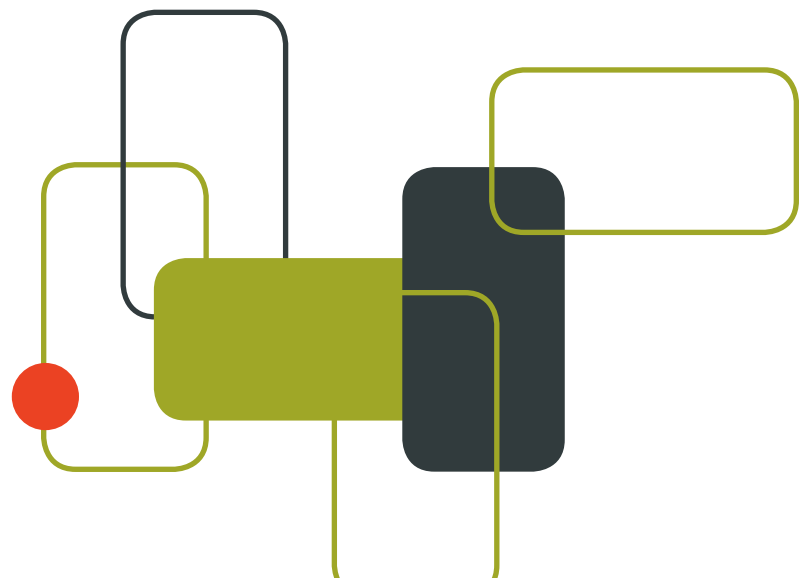
How to Manage a Small Law Firm

Your Wall Street Office

Inner PC

Zola Media

Interstate Filings



SCHEDULE

Check-In and Networking Breakfast – 8:30 AM – 8:45 AM

A Welcome from NYC Bar President John Kiernan – 8:45 AM

Introduction by Richard Hugo-Hamman of LEAP Legal Software

PLENARY: 9:00 AM - 10:00 AM Law Firm Marketing – A Failure to Plan is a Plan to Fail

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.” 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; and
- What the Return on Investment is going to be

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, useful conversations with marketing firms, and to consume their services in a way that will get you results. This session will help give you the tools to make your marketing much more profitable.

Speaker: **CHRISTOPHER ANDERSON**, How to Manage a Small Law Firm

Track I: 10:00 AM – 10:45 AM The Nuts and Bolts of Starting a Law Firm

Have you recently started your own law firm or thought about doing so? Please join our panel of experts as they discuss the basics of starting a practice, including formulating a business plan, entity selection for a New York-based practice, tax, governing documents necessary to maintain your law office, and liability issues involved in entity selection. Our panel will provide you with a checklist of items for starting a law firm. You won't want to miss this program.

Moderator: **ANNE LaBARBERA**, Law Office of Anne LaBarbera

Panel Members: **LORI ANN FOX**, Wolters Kluwer's CT Corporation; **VAUGHN BUFFALO**, Buffalo & Associates LLC; **JOHN CLAPP**, Clapp Kelner PLLC; **MATTHEW FOREMAN**, Law Office of Matthew E. Foreman P.C.

Track II: 10:00 AM – 10:45 AM
How to Use Content to Establish Thought Leadership, Build Trust and Drive New Business

Content is essentially everything you produce that your client or prospect touches or interacts with. This includes your website, blog, newsletter, e-books, white papers, infographics, case studies, webinars, video, podcasts, and so on. These are your content assets. But assets without strategy is useless. In this presentation, we'll workshop a strategy-driven approach to creating content for a range of digital assets that provides use to your clients and prospects, builds trust and influence, and drives new business.

- Documenting a content strategy
- The blog as your publishing platform
- Developing a social media plan
- Thought leadership

Speakers: **TIM BARAN**, Good2bSocial; **KEVIN O'KEEFE**, LexBlog

Track I: 11:15 AM – 12:00 PM Create Your Best Networking Strategy

Networking is a primary technique to connect lawyers to their audience of referrers and potential clients. It is both a technique and a strategy that you use to become visible and relevant to your key audiences. Join us to learn how to create a networking strategy, the best techniques to use to be an effective networker, and tips for making networking fun.

Moderator: **GARY KAUFMAN**, The Law Office of Gary Kaufman, PLLC

Panel Members: **KRISTIN GRANT**, Law Office of Kristin Grant; **CAROL GREENWALD**, MarketingPartners; **MARTIN KLEIN**, Kamerman, Uncyk, Soniker, & Klein P.C.; **OLIVERA MEDENICA**, Medenica Law PLLC

TRACK II: 11:15 AM – 12:00 PM

Legal Services Contracting Opportunities with Governmental Entities in New York City Area

The Minority and Women-owned Business Enterprise (M/WBE) Certification Program connects certified businesses with opportunities to sell their products and services to New York City agencies. The program's goal is to promote fairness and equity in City procurement processes by providing services designed to strengthen the ability of certified M/WBEs to increase their capacity and effectively contribute to the City's economy. Launched by Mayor Bill de Blasio in 2015, OneNYC established the goal for the City to award \$16 billion in contracts to City-certified M/WBEs over the next 10 years. We will discuss the certification process generally and the types of opportunities available for small law firms with various entities.

Speaker: **MURIEL GOODE-TRUFANT**, Senior Attorney, New York City Law Department

Networking Lunch – 12:00 PM – 12:45 PM

Plenary: 12:45 PM – 1:15 PM Understanding the Power of Casemaker

Introduction By: **LAWRENCE McELROEN**, Sterling National Bank

City Bar members have free remote access to Casemaker – a comprehensive legal research library. This live program will provide an overview on how to use the Casemaker library to your best advantage. Topics covered include research techniques, resources, saving research results and annotating and organizing research results for incorporation into memoranda or briefs. This live demonstration of Casemaker's latest features will assist lawyers in using the library most effectively, whether they are new to Casemaker or have used it in the past.

Speaker: **JIM CORBETT**, Casemaker

Plenary: 1:15 PM – 2:15 PM

Risk Management: The Intersection of Professional Liability and Cyber Insurance (1CLE Credit)

Introduction By: **ROGER GILL**, Lockton Companies

Much of the information a law firm holds is of interest to many, including those who wish to do you and your clients harm.

How you manage and secure that data is challenging in and of itself, however a firm should also look at the risk management issues, and how insurance can play a part in that approach.

At this panel session, we will cover:

- How to protect your firm against these issues
- Common mistakes and misunderstandings by lawyers and law firms
- What to do in the event of a breach or loss of data
- How your Professional Liability and Cyber Insurance policies should respond

Speakers: **ROGER GILL**, Lockton Companies; **CHRISTINE CZUPRYNSKI**, McDonald Hopkins; **TODD HAMPTON**, Berkley Select and Monitor Liability Managers; **JASON REBHOLZ**, The Crypsis Group

Track I: 2:15 PM – 3:00 PM

Getting the Best Fit: Finding the Right Practice Management System for Your Firm

Hear from a panel of attorney users who will give their perspective and help you compare Practice Management systems so you can find the one that best meets your needs.

Moderator: **CAROL L. SCHLEIN**, Attorney and President of Law Office Systems, Inc.

Panel Attorneys: **SUSAN DENNEHY**, The Dennehy Law Firm; **MEGAN GODDARD**, Goddard Law PLLC; **DARIS B. JACKSON**, Law Office of Daris B. Jackson; **ROBERT McANDREW**, Counsellor at Law; **STEPHEN J. SILVERBERG**, Law Office of Stephen J. Silverberg, P.C.

Track II: 2:15 PM – 3:00 PM

Rainmaking: The No-Nonsense Guide to Consistently Landing Quality Clients

Introduction By: **AMY McARTHUR**, LexisNexis

Whatever you call it -- rainmaking, growing your book of business, client development, or legal marketing – creating a sustainable pipeline of profitable new matters is both art and science, and it's very hard work. There's no magic bullet, and it requires significant investments of time and resources.

The good news though, is that with determination, you CAN learn both the art and the science of rainmaking, and this materials-rich presentation will give you both the comprehensive framework and many of the concrete tools you'll need to clarify your direction and accelerate your success.

Speaker: **BILL JAWITZ**, Law Practice Development Coach, SuccessTrack ESQ

Plenary: 3:15 PM – 4:15 PM How Your Small Firm/Solo Practice Can Minimize Ethics Complaints and Negative Outcomes (1 CLE Credit)

Introduction By: **FRED MORRIS**, CT Corporation

Small firms and solo practitioners receive a disproportionate number of Ethics Complaints. This program, featuring the Chief Attorney of the Attorney Grievance Committee, an experienced ethics defense counsel, and a Judicial Hearing Officer for attorneys and judges will help you minimize the likelihood a complaint will be made and understand how best to increase the likelihood of a positive outcome when that complaint is made.

Moderator: **DENISE A. RUBIN**, Member, New York City Bar Professional Ethics Committee

Panelists: **JORGE DOPICO**, Chief Attorney, Attorney Grievance Committee; **PERY D. KRINSKY**, Private Practitioner, Ethics-Based Defense Litigation, practice concentrated on representing attorneys in criminal matters, and defending attorneys before the State and Federal Grievance Committees. **JAMES SHED**, Referee on Attorneys & Judges Disciplinary Matters appointed by the First Judicial Department

Wine Reception and Raffle – 4:15 PM – 5:00 PM

REGISTRATION

AGENDA AT-A-GLANCE

8:30 AM - 9:00 AM

Registration/Networking Breakfast

9:00 AM - 10:00 AM

PLENARY: Law Firm Marketing - A Failure to Plan is a Plan to Fail

10:00 AM - 10:45 AM

TRACK 1: The Nuts and Bolts of Starting a Law Firm

10:00 AM - 10:45 AM

TRACK 2: How to Use Content to Establish Thought Leadership, Build Trust and Drive New Business

10:45 AM - 11:15 AM

Coffee/Networking Break

11:15 AM - 12:00 PM

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TRACK 2: Legal Services Contracting Opportunities with Governmental Entities in New York City Area

12:00 PM - 12:45 PM

Networking Lunch

12:45 PM - 1:15 PM

PLENARY: Understanding the Power of Casemaker

1:15 PM - 2:15 PM

PLENARY: Risk Management: The Intersection of Professional Liability and Cyber Insurance (1 CLE Credit)

2:15 PM - 3:00 PM

TRACK 1: Leveraging Technology Tools to Manage & Grow Your Practice – A Users Perspective of Products in the Marketplace

2:15 PM - 3:00 PM

TRACK 2: Rainmaking: The No-Nonsense Guide to Consistently Landing Quality Clients

3:00 PM - 3:15 PM

Coffee/Networking Break

3:15 PM - 4:15 PM

PLENARY: How Your Small Firm/Solo Practice Can Minimize Ethics Complaints and Negative Outcomes (1 CLE Credit)

4:15 PM - 5:00 PM

Wine Reception and Raffle

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42 West 44th Street

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Attn. Small Law Firm Center

Register on or before September 30, 2017:

\$50 Member \$85 Non-members*

Register after September 30, 2017:

\$65 Member \$100 Non-members*

Admission includes Exhibit Hall, Workshops, Networking Breakfast, Lunch, Plenary Sessions, and Wine Reception.

Space is limited. No refunds of Symposium registration fees after November 9.

*For membership information, visit www.nycbar.org or call 212-382-6665.

REGISTRANT

Name _____

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