The 2017 Annual WSBA Solo and Small Firm Conference: The Small Firm Revolution – Forging Your Path to the Future

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REPORTING YOUR CREDIT
This recorded seminar was originally presented as the live seminar and webcast The 2017 Annual WSBA Solo and Small Firm Conference: The Small Firm Revolution – Forging Your Path to the Future, recorded on July 14, 2017 – July 15, 2017, in Lynwood, WA. If you attended the live seminar or webcast and reported CLE credits, you cannot also report credits from watching or listening to this recording.

DESCRIPTION
The premier annual program for solo and small-firm attorneys helps you run your practice more effectively while keeping yourself on an even keel. Just a sampling of the topics covered shows why.

AGENDA
1 Technology Tips You Can Start Using Now
Learn easy-to-implement tips to improve your productivity, secure your files and communications, and streamline your workflow.

Sam Glover – Lawyerist.com, Minneapolis

2 The Ethical and Professional Considerations of Running a Home Office
This session is grounded in the RPCs and advisory opinions as they relate to running a home office and also addresses other professional and practical considerations that one might make when weighing insurance options, office space and setup, professional image and family/work boundaries, for example.

Jenny Coates – Jenny Coates Law, PLLC, Bainbridge Island and Seattle
Jeanne Marie Clavere – Washington State Bar Association, Seattle
Andrew Benjamin – Benjamin Law Group, PLLC, Seattle
3 Big Law Marketing Techniques on a Small Firm Budget – Developing Your Marketing Plan for Attracting New Clients and Client Retention
Gone are the days when big law firms had the marketing advantage over small firms because of their deep marketing-dollars pockets. Today, effective marketing is much more likely to be a product of creativity and innovation than of big-buck investment. Technology, especially social media, targeted networking, and more, have opened up all sorts of new avenues to potential clients, and smart practitioners are taking full advantage. Learn how to make the best use of your small firm marketing budget to attract lots of the clients with whom you most want to work!
Meghan Granito – Miller Nash Graham & Dunn, Seattle
Cynthia Voth – Miller Nash Graham & Dunn, Seattle

4 What Practice Areas Are Starting to Take Off?
The trends shaping the future of law practice mean some practice areas are likely to sink while others are likely to take off. This session discusses the practice areas that look like better investments.
Sam Glover – Lawyerist.com, Minneapolis

5 So You Want to Open Your Own Practice – A Two-Year Plan for Opening and Building Your Solo Practice from the Ground Up
Spend time upfront creating a solid foundation, and you’ll increase your chances for long-term success and sustainability. In this session, learn the basics of starting a law practice, including how to calculate start-up costs and overhead, assess technology needs, access forms and libraries without breaking the bank, and get and keep paying clients.
Ann Guinn – G&P Associates, Reno
Julie Fowler – Attorney at Law, Bellevue

6 How Do You Prepare for Mediation, Arbitration or Litigation?
Hon. Sharon Armstrong – JAMS, Seattle, WA
Hon. Jerry Moberg – Jerry Moberg & Associates PS, Seattle, WA
Phil Cutler – Cutler Nylander & Hayton PS, Seattle, WA

7 Persuasive Communication Skills
Strong verbal communication skills are essential in the legal profession. What are the key aspects to consider when structuring an argument in court or explaining legal concepts to clients, for example? What are the non-verbal cues we give off in any given setting? In this recorded session, get an overview of some considerations and come away with a greater awareness of the capacity we all have to improve on our communications.

8 Malpractice Avoidance
Proactive risk management protects the client and the lawyer. This session addresses preventative techniques intended to reduce exposure to common ethical and civil liability pitfalls.
Mark Johnson -- Johnson Flora Sprangers PLLC, Seattle
9 **Rapid Fire Practice Tips**
Solo and small firm legal professionals are also running a business practice. In this panel presentation hear from practicing attorneys and what considerations they made regarding office space, software, going paperless, marketing and business development, work/life balance, financial matters, and management of clients.

Michael Matesky – *Matesky Law PLLC, Seattle*
Karen Klein – *Law Offices of Karen A. Klein, Bainbridge Island*
Joseph Koplin – *Moschetto Koplin, Bellevue*

10 **Effective Client Communication**
Clear communication between a lawyer and a client is the legal equivalent of good bedside manner and medical informed consent. Clients have a right to make decisions based on material information communicated in a manner that is clear and understandable to them and the standard of care and the Rules of Professional Responsibility require lawyers to do so. This session presents practice tips and risk management suggestions intended to reduce the chance of a client saying: “Why didn’t you tell me that?”

Nancy Pacharzina – *Pacharzina Law PLLC, Seattle*
Mark Johnson – *Johnson Flora Sprangers PLLC, Seattle*

11 **How to Keep Yourself Motivated and Avoid Practicing in a Vacuum as a Solo**
Panelists facilitate an informal and interactive presentation, reviewing how to lean into your strengths, and how to build a practice that allows you to live the life you wish to live. Be ready to reflect on your own practices.

Kristina Larry – *Sassy Litigations, Seattle*
Greg McLawsen – *Sound Immigration, Tacoma*
Julia McLawsen Ph.D.– *Julia McLawsen, Ph.D., Seattle*

12 **Ethical Fee Agreements and Practices**
- Establishing the Attorney-Client Relationship:
  - What to include, and not include, in your fee agreements.
  - Protecting against the inadvertent client
- Maintaining the Attorney-Client Relationship:
  - Fiduciary duties during the attorney-client relationship
  - Amendment of the fee agreement
  - Communication during the relationship
- Terminating the Attorney-Client Relationship
  - Protection of client confidences
  - Withdrawal essentials
  - Should I sue to collect the fee?

Brian J. Waid – *Waid Law Office, Seattle*

13 **A Refresher on Managing Your Trust Account**
Drawing straight from the rules of professional conduct, this session will review what rules have been implemented, as well as comments and advisory opinions to note, in effort to protect both clients and lawyers in trust accounting for Washington lawyers.

Lainie Hammond – *IOLTA Compliance, Brewster*