

The 2024 WSBA Solo and Small Firm Conference: Looking Back to Move Forward



ORIGINAL PROGRAM DATES

September 27-29, 2024

AVAILABLE MEDIA TYPES

Video & Audio MP3

*Presented in collaboration with the WSBA
Solo & Small Practice Section*

REPORTING YOUR CREDIT

This on-demand seminar was originally presented as a live webcast on September 27-29, 2024, in Suquamish, WA. If you attended the live webcast and reported CLE credits, you cannot also report credits from watching or listening to this recording if repeated within your three year reporting period.

DESCRIPTION

The theme of the 19th Annual Solo and Small Firm Conference is “Looking Back to Move Forward”. Co-sponsored with the Solo & Small Practice Section, this program has been thoughtfully designed to include presentations by industry experts on a variety of topics to help you feel more confident and up-to-date in the management of your practice.

AGENDA

1 Bootcamp: Starting a Solo/Small Firm

In this session, you will have the opportunity to:

- Consider whether solo practice is right for you.
- Gain clarity of your first steps to get going (including what hazards you may encounter!).
- Identify and respond to the fears that are holding you back from going solo.

Julie Fowler - Law Office of Julie K. Fowler, P.S., Bellevue, WA

Kristina Larry - Sassy Litigations, Tukwila, WA

Alison Sheets - Sheets Law, Mukilteo, WA

2 Looking Back to Move Forward

We've all heard the adage “Those who cannot remember the past are condemned to repeat it.” That certainly holds true in business. There are valuable lessons to be learned from past business decisions and performance if you'll just tap into them. This presentation will help you analyze the metrics and strategies from your firm's past to help guide your practice to new levels of productivity, client satisfaction, and profitability in the future.

Ann Guinn - G & P Associates, Reno, NV

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3 The Why and How of Creating a Vision for Your Law Practice

When new attorneys ask me for advice on whether they should start their own practice, I typically ask them if they want to own a business or if they want to practice law. Although part of being a solo or small practice is the practice of law, half of what we do is running a business. And every business needs a plan, also known as a vision. Otherwise, we're just wandering aimlessly in the dark. During this session, we will go over how a vision helps you, how it evolves, and how to create one of your own.

Shreya Ley - Layroots, LLC, Seattle, WA

4 Flying Solo - 30 Things Every Solo, Small Firm, or Rural Attorney Needs to Know

Feeling unsure about your legal practice? No worries! This course will teach you to soar by covering everything you need to know to protect yourself and your clients from potential malpractice claims. Using a 30-item checklist as the presentation backdrop, this program will highlight common malpractice and ethical concerns solo, small firm, and rural lawyers face and share practical tips lawyers can use to responsibly address the concerns identified. From client communication to document management, ethical considerations to risk mitigation, this course will empower you to navigate your solo law practice with confidence and professionalism.

Mark Bassingthwaighte - ALPS Insurance, Saint Cloud, FL

5A Using Microsoft Copilot in Your Law Practice

In this session we'll talk about what Copilot is and how you can use it to be more efficient and productive. We'll talk about how it works, point out some things to watch out for, and give tips on how you can use it in Word, PowerPoint, Excel, Outlook, OneNote and more.

Ben Schorr - Microsoft, Redmond, WA

5B How to Help Your Paralegal Succeed

Here from current and former paralegals about what helped them in various jobs to be their best? What did employers do to encourage them and support them? What could employers have done better? What suggestions do they have for employers in order for employers to take full advantage of using their paralegal's skills?

Commissioner Susan E. Harness - Snohomish County Superior Court, Everett, WA

Dara Wasalino Tremblay - Law Office of Mark D. Nelson, PLLC, Gig Harbor, WA

Kyla Reynolds - Amazon, Seattle, WA

6A Best Management Practices for Your Solo/Small Firm

Two old pros and a young one share best practice management tips from a combined 100+ years of experience in law firms! You'll learn what works for them, as well as hear about the "good" ideas that were tried - and failed. This presentation offers a treasure trove of solid advice to help you strengthen your practice while sidestepping the "trial and error" phase of implementing new ideas. Your practice will thank you for attending!

Bruce Gardiner - The Gardiner Law Firm, Kirkland, WA

Ann Guinn - G & P Associates, Reno, NV

Nicholas Pleasants - Oseran Hahn PS, Bellevue, WA

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6B Working for You and Your Business : Financial Strategies and Tools

Working for You and Your Business is designed to help small-business owners understand the financial strategies and tools available to help run their business more effectively. Topics include:

- Various banking, retirement plan and insurance options
- Valuable strategies that can help you create value outside your business
- Strategies for building and preserving your business

Randy Robichaud - Edward Jones, Mukilteo, WA

7 A.I. & Emerging Technologies and Their Implications for the Judiciary and Legal Profession

This presentation will cover developments in artificial intelligence and associated technologies and potential implications they hold for the judiciary and the legal profession.

Judge Sean O'Donnell - King County Superior Court, Seattle, WA

8A What To Do with Your Law Degree When You No Longer Want to Practice Law

Everyone tells you, "You can do anything with a law degree!" But few of those people have law degrees and an even smaller number have ever tried to "do anything with a law degree." This presentation will feature three law school graduates who have not only found their way out of the formal practice of law but who also have a lot of passion around helping lawyers to find a role that suits them. While you can't do anything with a law degree (brain surgery and rocket science are probably out without a great deal of additional training!) Shawn, Dan, and Allie will share their stories and best practices about how to transition out of law practice and provide concrete steps you can take to explore your options outside of law.

Allie Sisson Erstad - Seattle University School of Law, Seattle, WA

Daniel Lear - InfoTrack, Seattle, WA

Kevin Plachy - Washington State Bar Association, Seattle, WA

8B Do I Really Need a Business Plan?

Well planned businesses are more profitable, easier to run, and easier to market. After a quick diagnostic on whether your law practice could use a business plan, you will see an example of a plan summary. Isolating the hardest component for law firms to perfect, you will learn, through a few examples and discussion, more about how to design your firm and integrate the components.

Aaron V Rocke - Rocke Law Group PLLC, Seattle, WA

9A Secure Your Firm's Future: Succession Planning Essentials

Join us for an engaging session on safeguarding your legal practice. Learn about contingency plans, knowledge transfer, and ethical considerations, all vital for a successful transition.

Margeaux Green - Washington State Bar Association, Seattle, WA

9B How To Improve Your Intake Process and Increase Conversion - A Workshop

This session will be a hands-on workshop where attendees will walk away with a new and improved intake process for their law firm. Having a documented, well thought out intake is vital to law firms; it directly impacts your conversion rate and ultimately, your firm's revenue. This is a great workshop for lawyers who are looking to open their own law firm and want help building out their intake process, or for existing law firm owners who recognize that their intake process could use some tweaks.

Darcel Lobo - DAL Coaching & Consulting, Normandy Park, WA

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10 Stress Management/Mindful Life

The law is a relational profession that brings us into daily contact with stressful conditions and intense relationships. This session will explore strategies and techniques that can help build resilience and maintain equanimity in day-to-day legal practice.

Dr. William Vesneski - University of Washington, Seattle, WA

11 Judge's Panel DEI - Not Just a Buzz Phrase or Afterthought

Learn how your work, not just what you do but how you do it, can reflect diversity, equity and inclusion at all levels of court. Judges from the courts of limited jurisdiction, superior court and the court of appeals will share thoughts on courtroom conduct, making GR 37 challenges, and language choices in pleadings and briefs.

Judge Linda W.Y. Coburn - Court of Appeals - Division I, Seattle, WA

Judge Tracy Flood - Bremerton Municipal Court, Bremerton, WA

Judge Whitney Rivera - Snohomish County Superior Court, Everett, WA

12 Effective Marketing for the Small Firm

It's competitive out there! The good news is that there are a variety of ways small firms can compete without trying to outspend their larger competitors. In this session, we'll explore the most effective ways small firms are winning clients in competitive markets. From budgeting and planning to execution, we'll cover full funnel strategies and tactics that work to help you achieve your growth objectives.

Gyi Tsakalakis - Attorneysync, Chicago, IL

13 Protecting Yourself and Your Clients: Best Practices for Documenting the Client Relationship and the Ethics of Retaining Client Files

Two Disciplinary Counsel will take you through some questions to ask when you first meet with clients, and discuss how the Rules of Professional Conduct and Advisory Opinions may apply. They will also discuss your professional obligations related to turning over client files.

Kathy Jo Blake - Washington State Bar Association, Seattle, WA

Erica Temple - Washington State Bar Association, Seattle, WA

14 Malpractice Missteps

Mark's presentation will address lawyer professional liability insurance issues, the frequency of malpractice claims by area of law and by type of activity and type of error, an outline of the law of lawyer liability, and suggestions for reducing the risk of malpractice claims.

Mark Johnson - Johnson Flora Sprangers PLLC, Seattle, WA