Managing and Marketing a Profitable Private Client Department

How to meet and overcome the challenges for today's law firm

24 June 2010, London

"This one day conference reviews the challenges for private client lawyers, and offers practical insights on how to maintain profitability and workloads."

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9.00 Coffee and Registration

9.30 Chair's Welcome and Introduction

Gill Steel, Director of LawSkills and Consultant to Blake Lapthorn

9.45 The Future of Private Practice for Solicitors' Firms

- Position now
- Problems
- Possibilities
- Proposals

Gill Steel, Director of LawSkills and Consultant to Blake Lapthorn

10.45 Coffee

11.00 Effective Marketing of a Wills and Probate Business

- Research, planning and positioning
- New products and services
- Profile raising and publicity
- Working with intermediaries and referrers
- Networking through communities
- Social media

Kim Tasso, Strategic Marketing Consultant

12.00 Making Wills Without Meeting the Client - Risks and Rewards

- The professional body's view
- The entrepreneur's view
- The law's view

Gill Steel, Director of LawSkills and Consultant to Blake Lapthorn

12.45 Questions

1.00 Lunch

2.00 Panel Discussion: What are the Growth Areas for Private Client Departments?

- Holistic advice centred around a particular type of client e.g. the older client
- Wealth protection
- Protecting the vulnerable

Panel: Gill Steel, Director of LawSkills and Consultant to Blake Lapthorn

John Eaton, Lupton Fawcett

Patricia Wass, Foot Anstey and Chair of the Law Society Probate Section

2.45 How to Deliver a Cost Effective Service

- Characteristics of a cost effective service
- Streamlining systems, processes and procedures
- Client perception of what is involved
- Bridging the gap between expectation and actuality

Pippa Blakemore, PEP Partnership LLP

3.30 Tea

3.45 How to Deliver a Profitable Service

- Gearing
- Chargeable hours
- Effect of fixed fees on budgets based on charge-out rates
- Improving cash flow
- Recovery

Robert Mowbray, Taylor Mowbray LLP

4.45 Chair's Concluding Remarks and Questions

5.00 Conference Close

Managing and Marketing a Profitable Private Client Department

Wills and probate lawyers face increasingly uninhibited and hungry competition, while at the same time encountering resistance from clients to paying commercial rates for advice.

This participative, lively and interactive one day conference will give practical advice, guidance and tips on how to maintain profitability, manage workloads and market effectively.

The speakers have a broad range of first-hand experience of running law firms, advising law firms and working with clients. They will highlight opportunities and suggest a multiplicity of well tried tested tips and techniques which are practical and immediately applicable, as the speakers understand the requirements and the constraints on lawyers and law firms in the current climate.

Chair:

Gill Steel is a solicitor and a member of the Law Society's Wills & Equity Committee. She is a STEP member and on the STEP UK Probate & Estates Committee. Her other qualifications include ATT and she has an MBA in Legal Practice Management. She is currently a consultant to Blake Lapthorn and is the author of *Trust Practitioner's Handbook* published by Law Society Publishing. Gill can be contacted via her website at www.lawskills.co.uk.

Speakers:

Pippa Blakemore is a leading international expert on identifying and meeting client expectations for law firms. She has worked over the last 25 years in Africa, Europe and the United States and is the Strategic Business Partner of the PEP Partnership LLP. For more details please see her website www.pep-partnership.co.uk.

John Eaton is a partner with Lupton Fawcett where he is financial services director, specialising in trust, tax, investments, portfolio management and financial planning for private clients. A regular contributor to financial and legal journals, he has appeared regularly on financial programmes on TV, Radio 4 ("You and Yours") and local radio, and is a regular speaker at financial and investment conferences. A former winner of the Yorkshire Lawyer "Private Client Lawyer of the Year" Award, he is also Chairman of the Pension Fund Trustees of two public Companies, the Honorary Solicitor to the Bradford & District Wool Association, Chairman of Bradford Businessman's Association, and a Past President of Bradford Law Society.

Robert Mowbray is an accountant and an expert on law firm profitability and management. He has provided services to nearly 500 firms across 30 countries. His clients have included everything from the largest City firms, through large regional firms and down to the most entrepreneurial smaller firms. He helps with a wide range of issues including time recording, pricing and fee negotiation, project management, profit sharing arrangements and improving the quality of management information. He is the author of *Maximising the profitability of law firms* and was the author of the Law Society's annual financial benchmarking survey from 2006-2009. He is also the lead author of *Solicitors - An Industry Accounting & Auditing Guide*. He has been voted "Trainer of the year" by the LETG. Robert trained in the early 1980s with PWC and spent 20 years as a partner at Macintyre Hudson LLP before setting up Taylor Mowbray LLP in 2009 to be a niche and independent advisor to professional service firms.

Kim Tasso is an independent strategic marketing consultant with over 30 years' experience. Qualified in psychology, marketing, management and coach/mentoring she has worked for over 300 firms including: lawyers, accountants and surveyors. She has written three books and the marketing section of *The Law Society's Probate Practitioners Handbook* www.kimtasso.com.

Patricia Wass is a partner with Foot Anstey where she specialises in wills, probate and trust work and all aspects of estate tax planning. She has over 20 years specialist experience in this work. She is a member of STEP and has served as a member of the West of England STEP Committee since 2000, becoming Chairman in 2006. In July 2005, Patricia was appointed to serve as an Executive Committee Member of the Law Society's Probate Section and is now the Chairman of that Committee.

6 Hours CPD

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Managing and Marketing a Profitable Private Client Department 24 June 2010, London

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