



THE CANADIAN BAR ASSOCIATION
L'ASSOCIATION DU BARREAU CANADIEN

The Fourth Annual Law Firm Leadership Conference

November 2 - 4, 2008 ♦ Marriott Château Champlain
MONTREAL

Program

SUNDAY, NOVEMBER 2, 2008

REGISTRATION DEADLINE OCTOBER 24 (BOOT CAMP ONLY)

7:30 a.m. – 8:30 a.m.

Boot Camp Registration and Breakfast

8:30 a.m. – 5:00 p.m.

Meeting the Leadership Challenge: Leadership Boot Camp

Sponsored by Konica Minolta

Law firm leaders today are being challenged to develop their leadership skills at three important levels: the individual, in groups and the firm as a whole. This highly interactive workshop provides participants with an opportunity to increase their knowledge, raise their awareness and hone their skills through a combination of presentation, group discussion and one-on-one debriefs. Strategies covered include:

- setting direction, building consensus and getting things done;
- political capital and group dynamics;
- managing conflict and change;
- coaching colleagues and holding people accountable;
- developing a personal leadership framework

By the end of the day, participants will understand the unique challenges of law firm leadership and the important distinction between leadership and management. They will have identified their unique style and personality, honed their own individual strengths, and will understand and begin to develop leadership versatility. Participants will complete three diagnostics and leave with many tools and materials which can be put to immediate, practical use. The workshop also offers each participant an opportunity to discuss issues confidentially with the program presenters, at mutually convenient times during the Conference.

Speakers: **Karen M. MacKay**, President, *Phoenix Legal Inc.* (Toronto)
Richard Pearson Consultant, *Phoenix Legal Inc.* (Vancouver)

5:30 p.m. – 8:30 p.m.

Welcome Reception

Sponsored by Stikeman Elliott LLP and McCarthy Tétrault LLP

MONDAY, NOVEMBER 3, 2008

8:00 a.m. – 9:00 a.m.

Conference Breakfast and Registration

Sponsored by GardaWorld

8:30 a.m. – 8:40 a.m.

Welcome & Introduction

8:40 a.m. – 10:00 a.m.

Rethinking the Nature of Legal Services



Richard Susskind, author of *The Future of Law* (1996), *Transforming the Law* (2000) and *The End of Lawyers?* (2008) (London, UK)

What will the future of legal service look like? How will the legal profession be affected by commoditization and new information technologies, particularly ‘disruptive legal technologies’? Richard Susskind has been at the forefront of efforts to examine such fundamental questions and point the way forward. A specialist in legal technology for 25 years, and an internationally respected author, Susskind will present his vision of the main challenges facing lawyers in the 21st century.



10:15 a.m. – 12:00 p.m.

Are You Getting the RPM out of KM to Keep You Out of ICU?

Clients demand excellent quality at a good price – and they don't pay firms to reinvent the wheel. In response, the most successful law firms are leveraging their accumulated knowledge, moving beyond just capturing precedents. Where it once might have been enough to manage "convenience" technology such as PCs, cell phones, PDAs, the web and the Internet, successful firms recognize that in order to remain competitive today, they have to make substantial investments (and earn a return) on putting their knowledge to work for clients.

Our panel of experts will provide insights on how you can implement Knowledge Management (KM) effectively, with advice on the role of technology and work culture in maximizing the benefits of KM. Two leading law firm KM experts – Michael Mills, of Davis Polk Wardell (New York, NY), and Jeff Rovner, of O'Melveny Meyers (Newport Beach, CA) – will share their insights. Joining them to provide the perspective of a Canadian firm that has successfully implemented a targeted KM project will be F.J.F (Frank) Quinn, of Bilkey Quinn (Kamloops, BC), which has transformed an entire practice area for the benefit of a key client (Royal Bank of Canada).

12:30 p.m. – 2:00 p.m.

Keynote Lunch Address

Sponsored by Dye & Durham

The Transition Into Retirement – A Firm Perspective



Barry LaValley, President, *The Retirement Lifestyle Center* (Nanaimo)

New challenges—and a world of opportunity—await the lawyer facing retirement. Careful planning will help to identify the best post-retirement options and to avoid common perils. A retirement also means an important transition for the law firm, which must face the potential implications well in advance of the employee's departure. What can Canadian law firms and managers do to meet the retirement challenges they will face? How can lawyers best prepare themselves for retirement? This presentation provides a road map for what may be just around the corner.

2:00 p.m. – 4:00 p.m.

The Strategic Management of Law Firm Risk

The most difficult issues that come up at law firms are often ones that no one has prepared for – news that a senior partner has suffered a heart attack, without there being a succession plan for his key clients, or the lawsuit that resulted because one of the partners has been harassing staff. The increasing complexity of law firms has resulted in more delegation and a less intimate awareness of what is happening at the firm. As a result, risk management is no longer just a matter of insurance. It is a matter of having systems in place that enable you to manage the inevitable problems that come up. Come hear experts discuss current issues that keep managing partners awake at night and offer practical strategies your firm can implement to manage those risks.

Concurrent Workshops Following Panel Discussion:

Growing the Firm's Business: Turning risks into opportunities.

Bad Behaviour 101: Tackling the 'ticking bombs' that lurk in our firms and threaten our reputations.

- Speakers:** Karen K.H. Bell, Practice Management Counsel, *Karen Bell LLB* (Toronto)
Jamie A.S. Dunbar, Partner, *Fraser Milner Casgrain LLP* (Toronto)
Trevor McCann, Partner, *Nicholl, Paskell-Mede* (Montreal)
Doug Richmond, Senior Vice President, *Aon Risk Services* (Chicago, IL)

Program

7:00 p.m. – 11:00 p.m.

Musique de Montréal – From the Streets to the Concert Halls

Sponsored by QA Courier

Guest tickets available for purchase

Marriott Château Champlain, Caf' Conc' Room



Montreal and Quebec have been a cultural meeting place for centuries, giving birth to some of the finest talent in Canada and the world. This year's private CBA soirée is a celebration of this diversity and once again, the multi-talented Mike Cowie returns to assemble an evening that will give you goose bumps. Star performer Ranee Lee, considered to be one of the greatest voices in Canadian music history, known for her award winning performance portraying the incomparable Billie Holiday in *Lady Day* will be one of the highlights of the evening. Come experience the tempos of tradition from the heart of Quebec to the sultry serenade of the city. Venez y éveiller tous vos sens!

TUESDAY, NOVEMBER 4, 2008

7:30 a.m. – 8:30 a.m.

Breakfast and Registration

Sponsored by Patella Manufacturing Inc. and Moureaux Hauspy + Associés Designers

8:30 a.m. – 10:00 a.m.

This Monumental Shift – The Great Fork in the Road for Technology, Canada & the Law



Leonard Brody, CEO & Co-Founder NowPublic, Venture Capitalist and Best-Selling Author (Vancouver)

We are standing at a crossroads. The world has changed more in the last 5 years than in any other point in history. In 5 more years, it will almost be unrecognizable. Come hear how this will affect you, your practice and your family from one of Canada's most respected entrepreneurs and best selling author.

10:15 a.m. – 12:00 p.m.

Associate Retention

Learn practical strategies and advice on how to hold on to your associates. John Childers of Hildebrandt International (San Francisco) will share with you the latest Hildebrandt research to help you understand four very different groups within your associate population. Stephanie Willson of McCarthy Tétrault (Toronto) draws on her extensive experience in talent management in large firms to discuss strategies to motivate, reward and compensate your associates to improve firm loyalty. Michael Thackray of Thackray Burgess (Calgary), who has created a law firm based on the shareholder model, will open your eyes to the possibility of using individually crafted employment arrangements that provide a creative approach to work/life demands of associates. Finally, Josée Gravel, First Vice-President, Legal Affairs at GE (Montreal), will give you inside tips on why associates desert private practice for the warm embrace of the corporate world, and whether you can curb this trend.

Please note that speakers are subject to change.

We encourage limited use of scented products during the conference in consideration of scent-sensitive participants. Thank you.

Thank You



2008 Organizing Committee

Planning the CBA National Conference on Law Firm Leadership takes time and dedication. We would like to introduce and thank the following leaders who have agreed to be part of our organizing committee. Their collective experience across diverse segments of the legal profession helps us deliver the very best programming possible.

Conference Co-Chairs

Kirby Chown, Ontario Regional Managing Partner, *McCarthy Tétrault LLP* (Toronto)

Stuart H. (Kip) Cobbett, Managing Partner and Chief Operating Officer, *Stikeman Elliott, S.E.N.C.R.L., LLP* (Montreal)

Committee Members

John A. Coleman, Managing Partner, Operations, *Ogilvy Renault LLP* (Montreal)

R. Scott S. Jolliffe, National Managing Partner, *Gowlings* (Toronto)

Gary H. Luftspring, Partner, *Ricketts, Harris LLP* (Toronto)

Robert G. Patzelt, Q.C., Vice-President, Risk Management and General Counsel, *Scotia Investments Limited* (Halifax)

Véronique Saulnier, Executive Director, *Canadian Bar Association - Quebec* (Montreal)

Wylie Spicer, Q.C., Partner, *McInnes Cooper* (Halifax)

Andrew S. Tremayne, Managing Partner, *Emond Harnden LLP* (Ottawa)

William Westeringh, Managing Partner, *Fasken Martineau DuMoulin LLP* (Vancouver)

Joan Bercovitch, Senior Director, Legal & Governmental Affairs, *Canadian Bar Association* (Ottawa)

Marie-Claude Noël, Project Officer, *Canadian Bar Association* (Ottawa)

Aviva Rotenberg, Director, Professional Development, *Canadian Bar Association* (Ottawa)



This program has been approved for LAWPRO CLE Premium Credit. For more information, please consult the following LAWPRO website:
<http://www.lawpro.ca/CLECredit>

Thank you to our sponsors



Who should attend?

Whether you lead a law firm of five or 500, or if you are among the next generation of firm leaders, this is an event you will want to attend. Join:

- Practice group leaders and law firm committee chairs
- Firm executive committee members
- General counsel and senior in-house counsel
- Managing partners
- Next-generation firm leaders

Thinking about bringing other members of your firm leadership or next-in-lines? See our registration form for special rates.

And while you are here, why not take the opportunity to extend your stay and enjoy a few extra days ... à la Montréalaise?

2008 LAW FIRM LEADERSHIP CONFERENCE

Marriott Château Champlain
1 Place du Canada, Montreal, Que. H3B 4C9
For reservations call : 1-800-200-5909
www.marriotthotels.com/yulcc



Registration Form

Name _____

CBA Member Number _____

Firm/Organization _____

Address _____

City _____ Province _____ Postal Code _____

Tel. _____ Fax _____

Registrant's Email **(required)** _____

Assistant's Email **(optional)** _____

Please indicate special needs (dietary, wheelchair access, etc.) _____

Leadership Boot Camp Registration - Nov. 2, 2008 (optional add-on)

Includes all educational sessions and materials as well as breakfast and lunch.

Sunday, Nov. 2 from 8:30-5:00

Member

\$750

Non Member

\$900

* Please note that registration deadline for the Boot Camp is Oct. 24.

Conference Registration - Nov. 2-4, 2008

Includes all educational sessions and materials, one ticket for both the Welcome Reception and the Musique de Montréal Soirée, all meals.

First Delegate

\$1,395

Second Delegate (15% discount)

\$1,185

Additional Delegates (25% discount)

\$1,045

Non Member

\$1,995

Guest Tickets for Evening Events

Welcome Reception

\$40

Musique de Montréal Soirée

\$150

Please ADD 5% GST to your total

Total enclosed

Québec residents add 7.5% TVQ on total amount after GST

METHOD OF PAYMENT

Cheque (made payable to the Canadian Bar Association) Visa Mastercard

Card No. _____

Expiry Date _____

Authorized Signature _____

HOW TO REGISTER

The Canadian Bar Association
ATT: Monique Nowakowski
500-865 Carling Avenue
Ottawa, ON K1S 5S8

Web: www.cba.org/cle
Fax: 613-237-0185
Phone: 613-237-2925

Marriott Château Champlain
1 Place du Canada
Montreal, Que. H3B 4C9
For reservations call: 1-800-200-5909
www.marriotthotels.com/yulcc

Please make your hotel reservation directly with the hotel and request the Law Firm Leadership conference rate. The preferred rate applies to bookings made on or before Oct. 16, 2008 (subject to availability). The rate for a standard deluxe room is \$169.

Travel for less

Air Canada is the official carrier for all CBA meetings. In order to receive a 10% discount on Tango Plus and higher fares, you must book your flight online at www.aircanada.ca and indicate the promotion code **YTH7HMHI**. The discount is not available if you call Air Canada directly.

Avis, the official rental car supplier of the CBA, offers several special rates. Call 1-800-331-1600 or visit www.avis.com to reserve your car. Rates include unlimited free kilometres. You must quote discount number C136498.

General Information

Dress code for the duration of the conference is business casual.

CANCELLATION POLICY

There will be a 20% administrative charge on any cancellations received by the CBA National Office up to and including Oct. 20, 2008. Cancellations after this date will not be eligible for refund or credit, but may be transferred to another individual from the same organization for this event.

The conference organizing committee reserves the right to make necessary changes to this program. Every effort will be made to keep presentations and speakers as represented. However, unforeseen circumstances may result in the substitution or cancellation of a presentation topic or speaker.

PERSONAL INFORMATION CONSENT

The CBA's programs are supported by preferred suppliers, sponsors and exhibitors. Subject to the following paragraph, I understand that the provision of contact information on this form constitutes my consent to such information being disclosed to the preferred suppliers, sponsors and exhibitors of this program. For further information about the CBA's treatment of personal information, see members' Privacy Policy at www.cba.org.

By checking this box I do not wish my contact information disclosed to the preferred suppliers, sponsors and exhibitors of this program. I understand my name will not appear on the delegates list.