



## **Legal Practice Management Conference for SME Law Firms**

**12 June 2019**

Hosted at:

**Bristol Law Society, 12 Colston Avenue, Bristol, BS1 4ST**  
**Registration: 1.30pm; Conference: 1.45pm-5.45pm;**  
**followed by networking drinks: 5.45pm-6.45pm**

Bristol Law Society and VWV approach are delighted to invite you to our inaugural Legal Practice Management Conference for SME Law Firms. The conference will address key business issues for law firms ranging from a GDPR update one year on, attracting talent in a competitive market, making tax digital, managing costs through risk management, a practical session focusing on regulatory changes coming down the line in 2019 to growing your firm in a challenging economy and what our recent client journey benchmarking survey has taught us about winning more work and keeping clients happy.

A G E N D A / C O N F E R E N C E P R O G R A M M E

- 1.30pm**      ***Registration and Coffee***
- 1.45pm**      **Introduction by Joint Chair**  
*Helen Read, Head of Operations, Bristol Law Society and Joanne Campbell, Senior Associate – Business Development Manager, VWV*
- 1.50pm**      **GDPR Update**  
*Andrew Gallie, Partner, VWV*
- 2.20pm**      **Talent Attraction in a Competitive Market**  
*Sheldon Carlisle, Senior Business Manager, Hays Legal*
- 2.50pm**      **Making tax digital**  
*Robert Rawle, General Practice Director, Milsted Langdon*
- 3.20pm**      ***Refreshments and Networking***
- 3.35pm**      **Legal risk and regulatory focus for 2019 and beyond – practical update**  
*Jody Evans, Director of Business Development, Legal Eye*
- 4.05pm**      **Growing your law firm in a challenging economy**  
*Lara Squires, Director, Consortium*
- 4.35pm**      **What the Bristol Law Society client journey has taught us and what steps can firms take to delight more clients and win more business**  
*Craig Hawthorn, Customer Experience Director, Insight6*
- 5.05pm**      **Managing costs through risk management**  
*John Kunzler, Senior Vice President, Marsh JLT Specialty*
- 5.35pm**      **Q&As and Closing remarks of Joint Chair**
- 5.45pm**      ***Networking Drinks***

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## EXPERT SPEAKERS BIOGRAPHIES

### **Helen Read, Head of Operations, Bristol Law Society**

Helen Read is the Head of Operations at Bristol Law Society. She is a former employment law solicitor who moved into legal recruitment in 1999 where she worked in a highly regarded national recruitment consultancy before moving in-house to join the recruitment team for Osborne Clarke, recruiting fee-earners and Partners across its national practice. She joined Bristol Law Society in June 2013 to re-launch its recruitment and careers service to members. She took on the role of Business Development Manager in 2015 and was appointed Head of Operations in 2018 taking on responsibility for the day to day running of the business of the society, its membership, sponsor relationships and extensive events and social networking programme. In these roles Helen has liaised extensively with The Law Society, frequently attends meetings for ASWLS (Association of South Western Law Societies) and Joint V Law Societies (Birmingham, Bristol, Liverpool, Leeds and Manchester Law Societies) as well as being a speaker at The National Local Law Society Conference held in Newport in 2015.



### **Joanne Campbell, Senior Associate – Business Development Manager, VWV approach**

If you're a small to medium sized law firm looking for support, Jo can explain the benefits of joining the VWV approach network and will work with you to ensure you get the most out of your membership. You choose how much support you require - whether that involves referring clients, working with you on matters, or offering you access to exclusive benefits. Her knowledge of the local legal market and contacts within national law firms ensure that if your client has a legal need, or if you, as a firm, require some help, Jo will help you find the best solution. In October 2018, the VWV approach team



received the 'Team of the Year' award from the Bristol Law Society, which recognises those who have made an outstanding contribution in the legal sector. Jo joined VWV in 1996, qualifying as a Solicitor in 2002. Starting her working life in a small firm before VWV and with a sole practitioner husband, she is committed to the support of small to medium law firms, and having juggled work with family commitments for more than 15 years she is aware of the daily demands of trying to achieve a good work/life balance.

### **Andrew Gallie, Partner, VWV**

Andrew advises on data protection and information law. Clients include charities, independent schools, further education colleges and businesses in the recruitment, technology, healthcare and ICT sectors. Andrew also advises on intellectual property, commercial and contract law matters. Andrew advises on all aspects of data protection and information law including cyber security, privacy, workforce monitoring, international data transfers and subject access requests. He also advises on requests made under freedom of information and environmental information legislation. Andrew has acted on a number of high profile data protection enforcement matters. Andrew is praised for his commercial approach and understanding of clients' needs and objectives. Comments from clients include:



*"You always make things nice and clear for us." "Thank you for this and for all your help in this matter which has been so helpful." "[We are] really happy with your approach to this and for the issues identified."*

Andrew edits the Data Protection & Freedom of Information and the Website & Electronic Communication sections of the Jordans Charities Administration Service. He is also a regular contributor to publications in the education and commercial sectors. Andrew frequently delivers training on data protection, information law and contract law matters.

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### **Sheldon Carlisle, Senior Business Manager, Hays Legal**

Sheldon is a Senior Business Manager at Hays Legal and specialises in recruiting legal professionals across the South West and Wales, working with NQ's through to Partners and teams. Sheldon practiced as a Commercial Property lawyer with Bevan Brittan and Osborne Clarke and has built up over 17 years' experience in the legal market. Having led and built the South West Legal team at Hays, he now focuses on managing client relationships and recruiting for the full spectrum of Legal roles in Private Practice. Sheldon is a regular speaker and hosts round table events for lawyers and law firm recruitment teams in Bristol for Bristol Law Society, the Bristol Junior Lawyers Division and HR in Law and has hosted the Hays Annual Salary Survey Launch event for business leaders across the Bristol market.



### **Robert Rawle, General Practice Director, Milsted Langdon**

Robert Rawle has more than 20 years' experience as a qualified accountant. Robert was appointed as General Practice Director at Milsted Langdon and he looks after an array of clients from many different sectors, although he has a particular specialism in the Media and Creative sector. After a couple of years in Milsted Langdon's Taunton office in the mid-90s, Robert moved to Bishop Fleming in Bristol where he progressed to become a Director and Head of Media and Creative Industries. Beyond this, Robert has extensive experience within the Property, Manufacturing and Tech sectors among others. He has assisted many companies from formation, through to eventual sale or succession planning, as well as the complications in between like fundraising and keeping up to date with the latest changes in legislation. On a more personal level, Robert has keen interests in the arts and music, gardening, architecture and



food (which is one reason for the gym membership!). Robert also holds a Director position with both The Sustainable Soils Alliance CIC and The West of England Design Forum CIC due to his personal beliefs and desire to aid these causes in helping the wider community.

### **Jody Evans, Director of Business Development, Legal Eye**

Jody Evans was recruited in 2007 to support a leading executive-led law firm in the delivery of ambitious growth plans through law firm acquisition. Jody took responsibility for heading the Risk and Compliance Team in 2012, with her prime focus being on the introduction of an effective risk and compliance framework across multiple locations and legal disciplines at a time of continuous change. She went on to manage projects which included the successful application for the firm to move to an ABS status, leading the firm to become accredited to industry leading Quality (ISO 9001) and Information Security (ISO 27001) standards across all locations, as well as the delivery of a firm-wide risk and compliance training and awareness programme. 2016 saw Jody move into the role of Chief Risk and Compliance Officer for an executive led private equity-backed legal services provider. Working with the managing directors and Chief Executive, she identified and prioritised the mitigation of areas of vulnerability across the group, leading to the creation of a Group level risk and compliance framework. Ahead of the GDPR 2018, Jody introduced a project steering group, process changes, training and awareness to help the business prepare effectively. Jody's in-depth legal experience and compliance knowledge enables her to effectively support the Legal Eye Team and set out distinct strategic goals in her role as Director of Business Development.



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### **Lara Squires, Director, Consortium**

Having worked in professional services for the past 10 years, Lara has a real insight into the challenges faced by the sector, and how to overcome these using a mix of sales and marketing tools. Lara's areas of expertise include, marketing strategy, communication plans, business development, sales training and mentoring. Lara has an innate confidence which enables her to get in front of the right people and create new business opportunities. Lara holds the Chartered Institute of Marketing's (CIM) Postgraduate Diploma and is a Chartered Marketer; she is an experienced sales professional who is inspired by helping companies achieve their business goals.



### **Craig Hawthorn, Customer Experience Director, Insight6**

With nearly 20 years of experience in leadership and sales, Craig has a wealth of knowledge to pull on when helping businesses to identify the correct solution to their current customer and people based challenges. He is passionate about helping businesses deliver the behavioural change required to give the very best experience to both customers and internal



teams. Craig's expertise includes business development, business mentoring and coaching, customer experience delivery and strategy, performance management and leadership development.

### **John Kunzler, Senior Vice President, Marsh JLT Specialty**

John specialises in risk and claim reduction in the FINPRO PI area at Marsh JLT Specialty, and delivers risk management advice and consultancy for UK and global law firm clients. By working with law firms and analysing claim data and legal processes, John develops risk management content and workshops for practice groups focused on particular areas of work, or more generally across firms. John joined Marsh in 2012 from Travelers where he was UK and Europe Senior Product Manager for PI. Prior to that role John managed in-house claims teams at Travelers, and at the England & Wales Solicitors Indemnity Fund, and worked in private practice for 7 years. John has experience of Professional Indemnity for Solicitors, Surveyors, Architects, Technology companies, Local Government, and Financial Advisers. John is a Solicitor and has a postgraduate degree in Management from Guildhall University



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## DELEGATE BOOKING FORM

Please complete this form in BLOCK CAPITALS. We accept photocopies of this booking form or you can download from [www.bristollawsociety.com/events](http://www.bristollawsociety.com/events). Return your booking form to: Clair Ponting, [events@bristollawsociety.com](mailto:events@bristollawsociety.com)

### CONFERENCE FEES - includes the full conference pack and refreshments

Bristol Law Society and VWV approach Members **£30** (£25+VAT)

Non-Members **£60** (£50+VAT)

#### Enquiries

For event enquiries call 0117 9458486 or e-mail [events@bristollawsociety.com](mailto:events@bristollawsociety.com).

**ORGANISATION DETAILS:** BLS Corporate Member  VWV approach Member

Organisation:

Postal Address\*:

Telephone No:

Accounts Department email address\*:

\*needed in order to raise/send invoice

**DELEGATE 1 DETAILS:** BLS Individual Member  Non-member  Unsure if member

First Name:

Surname:

Job Title:

Delegate's Email:

Please specify any special or dietary requirements:

**DELEGATE 2 DETAILS:** BLS Individual Member  Non-member  Unsure if member

First Name:

Surname:

Job Title:

Delegate's Email:

Please specify any special or dietary requirements:

**DELEGATE 3 DETAILS:** BLS Individual Member  Non-member  Unsure if member

First Name:

Surname:

Job Title:

Delegate's Email:

Please specify any special or dietary requirements:

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### TERMS & CONDITIONS

By booking a place on this course you are agreeing to our [standard terms and conditions](#)

#### **Confirmation of Booking**

Confirmation will be sent by email. If you have not received confirmation of your booking 14 days after registering, please contact us on 0117 945 8486 or via email [events@bristollawsociety.com](mailto:events@bristollawsociety.com). Upon receipt of your booking, we will issue you an invoice for your payment. The venue information and final details will be sent approximately 3-4 days prior to the event. Please note that full payment must reach us before the conference takes place for admission to be guaranteed.

#### **Cancellations and substitutions**

Cancellations must be confirmed in writing at least 14 working days before the conference.

Any cancellations received after this date will be liable for the full fee, course notes will be forwarded. Delegates who are unable to attend due to circumstances beyond BLS' control and who have not cancelled in advance will still be liable for the full fee, course notes will be forwarded. No refunds will be given. Delegate name changes may be made in writing at any time at no extra charge.

Bristol Law Society reserves the right to cancel any event. In this case, the full fee will be refunded unless a mutually convenient transfer can be arranged. In the event that the Society postpones an event for any reason and the delegate is unable or unwilling to attend on the rescheduled date, they will receive a full refund of the fee paid or credit note. Credit notes will be valid for six months from date of issue.

It may be necessary to change the content and timing of the programme, speakers or venue due to circumstances beyond the control of BLS.

The Society is not responsible for any loss or damage as a result of a substitution, alteration or cancellation/postponement of an event, this includes travel and accommodation expenses.

The Society shall assume no liability whatsoever if this event is cancelled, rescheduled or postponed due to a fortuitous event, Act of God, unforeseen occurrence or any other event that renders performance of this conference impracticable, illegal or impossible. For purposes of this clause, a fortuitous event shall include, but not be limited to: war, fire, labour strike, extreme weather or other emergency.

#### **Data Protection Act 2018**

By booking on this event, you consent to us retaining your personal details on our database to enable us to process your booking and contact you regarding the event and other future relevant training events. Please see our [Privacy Notice](#) for further information of a similar topic. Unless otherwise requested, delegates' names and firms will be shared with speakers, sponsors and exhibitors.