

# 2017 Solo Practitioner Conference

*Client Service, Emerging Technology, Ethics and the Delivery of Legal Services*

**Wednesday, September 13, 2017**

**9:00 a.m. – 4:30 p.m.**

**Executive Conference Center**

1601 Broadway at 48th Street | NYC

**NYSBACLE**  
Live Program & Webcast



Includes  
4.0 ethics credits

## Reasons to Attend:

- Solo Practitioners can learn how to develop an effective marketing and business development strategy
- Learn about the interplay between marketing, attorney ethics and virtual practices
- Receive a copy of the NYSBA Publication *Grow Your Practice: Legal Marketing and Business Development Strategies* (\$65 value)
- \$195 for NYSBA Members; program fee includes luncheon



**[www.nysba.org/  
SoloConference2017](http://www.nysba.org/SoloConference2017)**

## PROGRAM DESCRIPTION

The 2017 Solo Practitioner Conference is built around the assumption that as a busy lawyer doing client work plus administrative tasks, there is sometimes not enough time for new business development and setting up a marketing plan. Attend this program and understand how to set up an effective marketing and business development strategy. You will learn what marketing options are available so that you can create a plan that works for you and best practices for the traditional tools of client service, networking, public relations and content creation. Current issues will be addressed in this exciting program featuring TED-Style talks, including a discussion about virtual practice.

### Get answers to these questions and much more . . .

- How can I differentiate my firm on the basis of client service?
- Is my current marketing in compliance with attorney advertising rules?
- Why should I make time to participate in in-person networking activities?
- How do I get visibility in my local community?
- Do I need to belong on AVVO or LegalZoom?
- What are the key components of a good, ethically compliant website?

Each registrant will receive a copy of the NYSBA publication on Marketing: *Grow Your Practice: Legal Marketing and Business Development Strategies* (\$65 value).

## PROGRAM LOCATION & PRICING

**Wednesday, September 13, 2017** | 9:00 a.m. – 4:30 p.m.

Includes Breakfast and Luncheon

### Executive Conference Center

1601 Broadway at 48th Street | NYC

Live and [Webcast](#)

**NYSBA Members: \$195** | Non-Members \$295

## Join the Conversation!

Live tweet with is using **#NYSBAMarketing**

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### 6.0 TOTAL CREDITS: 4.0 ethics; 2.0 areas of professional practice

This course has been approved for MCLE credit in New York for all attorneys, including newly admitted (less than 24 months).

This program has also been approved for MCLE credit by the **State Bar of California** and the **Pennsylvania Continuing Legal Education Board** for 0 credit hours of substantive law and 3.5 credit hours of ethics. All inquiries regarding MCLE credits may be directed to (518) 487-5606.

This program has been approved by the **Board on Continuing Legal Education of the Supreme Court of New Jersey** for 6.4 hours of total CLE credit. Of these, 4.0 qualify as hours of credit for ethics/professionalism, and 0.0 qualify as hours of credit toward certification in civil trial law, criminal trial law, workers compensation law and/ or matrimonial law. This course does not qualify under any of the nine specified new admit areas, in five of which New Jersey attorneys admitted in 2009 or thereafter, in their first full two-year compliance period, must take 15 of their 24 required credit hours (see BCLE Reg. 201:2).

The New York State Bar Association's Committee on Continuing Legal Education has been certified by the New York State Continuing Legal Education Board as an accredited provider of continuing legal education in the State of New York.

**IMPORTANT NOTICE: PARTIAL CREDIT FOR PROGRAM SEGMENTS NOT ALLOWED.** Under the New York State Continuing Legal Education Board Regulations and Guidelines, attendees at CLE programs cannot receive MCLE credit for a program segment unless they are present for the entire segment. Persons who arrive late, depart early, or are absent for any portion of the segment will not receive credit for that segment.

## AGENDA

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- 8:30 – 9:00 a.m.      **Registration & Continental Breakfast**
- 9:00 – 9:10 a.m.      **Welcome and Introductions**
- 9:10 – 9:20 a.m.      **Setting the Stage: Marketing and the Internet:  
Ways Solo Practitioners Can Serve Their Clients Efficiently  
and Effectively**
- Today, effective marketing combines high tech and high touch – so lawyers need to meld the two worlds into a strategic practice growth plan. In this program the morning focuses on online opportunities – specifically your own website and business-related directory/networking sites.
- In the afternoon the focus shifts to traditional marketing techniques – updated for the 21st century. We will pay attention to the ethical guidelines that need to be adhered to in any business development endeavor, including a discussion of Rule 7 and its implications for online advertising and marketing. This program will conclude with a session on marketing plans that incorporate the knowledge gained today.
- Speakers:              **Carol Schiro Greenwald, Ph.D., MarketingPartners**  
                              **Nancy B. Schess, Esq., Klein Zelman Rothermel Jacobs & Schess LLP**
- 9:20 – 10:10 a.m.      **Website Best Practices  
Compliance with the New York Rules of Professional Conduct**
- This topic will focus on website best practices, including the key components of a good, ethically compliant website. It will also inform lawyers as to what they need to know to create an effective site, whether a website should be the equivalent of an online brochure or whether it should include sections that are more niche focused or sales oriented, and if attorneys should encourage visitor action on their websites.
- Speakers:              **Mitch Tobol, CGT Marketing**  
                              **Nancy B. Schess, Esq., Klein Zelman Rothermel Jacobs & Schess LLP**  
                              *(1.0 MCLE Credits in Ethics)*
- 10:10 – 11:30 a.m.      **Modern Delivery of Legal Services  
Best Practices for Solo Practitioners  
Recent Ethics Opinions | LinkedIn, AVVO and LegalZoom**
- Lawyers hear a lot of misinformation about the services of on-line directories. They often don't realize that depending on their target clients and/or their practice area there are benefits to be gained by participating on these sites. Panelists will discuss the following regarding these websites:
- User demographics lawyers might benefit from
  - How lawyers can learn if their target audience uses these sites
  - How to reap the maximum benefits from participating
  - What lawyers can do for free and what they have to pay for
  - What kind of ethical issues have been raised in relation to using these sites and how have they been addressed?
- Speakers:              **Marc Halpert, Connect2Collaborate**  
                              **Dan Lear, Esq., AVVO**  
                              **Sally Robertson, Esq., LegalZoom**  
                              *(1.5 MCLE Credits in Ethics )*
- 11:30 – 12:00 p.m.      **Lunch | Sponsored by NYSBA's Membership Committee's  
Subcommittee on Non-Resident Membership**
- 12:00 – 1:00 p.m.      **Technology and the Future of the Legal Profession  
Solo Practitioners and the Virtual Law Office**
- Speaker:                **Chad Burton, Esq., CuroLegal**  
                              *(1.0 MCLE Credit in Law Practice Management)*

# AGENDA

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1:00 – 1:30 p.m.	<b>Client Service   10 Ways to Keep Your Clients Happy</b>  Today's clients are consumers interested in participating in all decisions relating to their well-being and their legal matter. Your approach to client service can make this a win-win experience or a difficult-to-manage case. This topic will focus on how lawyers can build on the ethical rules related to clients' role in a legal matter to create a world-class, differentiating level of client service.  <b>Speakers:</b> <b>Carol Schiro Greenwald, Ph.D.,</b> MarketingPartners <b>Nancy B. Schess, Esq.,</b> Klein Zelman Rothermel Jacobs & Schess LLP <i>(0.5 MCLE Credit in Law Practice Management)</i>
1:30 – 2:45 p.m.	<b>TED-Talks: Traditional Marketing Techniques: Modern Best Practices and Key Considerations for Solo Practitioners</b>  These panelists will offer practical tips to help you use traditional business development techniques effectively including network-ing do's and don'ts, content creation and public relations 101. Speakers will discuss the skills, techniques and strategies needed to successfully incorporate networking, writing and publicity into a strategy to grow your practice or your firm.  <b>Speakers:</b> <b>Keith Emmer,</b> Startegix LLC <b>John Rumely,</b> Rumely Advisors LLC <b>Nancy B. Schess, Esq.,</b> Klein Zelman Rothermel Jacobs & Schess LLP <i>(0.5 MCLE Credit in Law Practice Management)</i>
2:45 – 3:00 p.m.	<b>Break</b>
3:00 – 4:15 p.m.	<b>Ethics in the Digital Age   What You Need to Know About Attorney Advertising in New York</b>  What you need to know about the New York's Rules of Profession-al Conduct in order to ensure that your online marketing activities adhere to the ethical boundaries.  <b>Speaker:</b> <b>Pery Krinsky, Esq.,</b> Krinsky, PLLC <i>(1.5 MCLE Credit in Ethics)</i>
4:15 – 4:30 p.m.	<b>Developing Your Strategic Growth Plan</b>  Effective marketing is strategic marketing, and strategic marketing requires a written plan as a precondition for success. This session will help you design a marketing plan that incorporates ideas you learned at the program.  <b>Speakers:</b> <b>Carol Schiro Greenwald, Ph.D.,</b> MarketingPartners <b>Nancy B. Schess, Esq.,</b> Klein Zelman Rothermel Jacobs & Schess LLP
4:30 p.m.	<b>Adjournment</b>

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## INFORMATION AND POLICIES

**Pre-registration Strongly Advised:** You can save money and guarantee your seat and course materials by registering early. Seating is limited in all locations and registrations are taken on a first-come, first-served basis.

**Cancellations Are Easy – Full Refunds Are Given:** Your full registration fee will be refunded if you give us notice no later than the close of business (4:45 p.m. EST) three business days prior to the date of the program for which you registered. Registrations canceled less than three business days from the program date will be assessed a cancellation fee of \$25.00. To cancel, call or email the Member Resource Center at (800) 582-2452 or [mrc@nysba.org](mailto:mrc@nysba.org). If you do not cancel and do not attend the program, access to a complete set of course materials in PDF format will be forwarded to you via e-mail in consideration of the registration fee. Non-registrants may purchase program materials after the final program date.

**MCLE Credit:** This program is acceptable for MCLE credit in New York and many other MCLE jurisdictions.

**Tuition Assistance:** New York attorneys may apply for tuition assistance to attend this program based on financial hardship. Any New York attorney who has a genuine financial hardship may apply for tuition assistance for a CLE program by completing a Tuition Assistance Request Form and returning it to the CLE Department no later than five working days prior to the program, explaining the basis of his/her hardship. If granted, the attorney will receive tuition assistance, depending on the individual's circumstances. For more details, please contact Holly Hirsch at (518) 487-5586.

**Recording of NYSBA Seminars in any form is strictly prohibited.**



**Accommodations for Persons with Disabilities:** NYSBA welcomes participation by individuals with disabilities. NYSBA is committed to complying with all applicable laws that prohibit discrimination against individuals on the basis of disability in the full and equal enjoyment of its goods, services, programs, activities, facilities, privileges, advantages, or accommodations. To request auxiliary aids or services or if you have any questions regarding accessibility, please contact Cindy O'Brien at (518) 487-5585 or [cobrien@nysba.org](mailto:cobrien@nysba.org).

## Join or Renew Your NYSBA Membership and Save



**With NYSBA Membership You Can Do More:**

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[www.nysba.org/LPM](http://www.nysba.org/LPM)

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4.0 Ethics | 2.0 LPM

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All registrants receive a free copy of the  
NYSBA publication Grow Your Practice:  
Legal Marketing and Business Development  
Strategies (\$65 Value)

## 4 WAYS TO REGISTER

- Call** **1.800.582.2452** (U.S. and Canada) or **518.463.3724** in Albany & surrounding area
- Mail** New York State Bar Association, Member Resource Center, One Elk Street, Albany, NY 12207
- Fax** **518.463.5993**  
Download an order form online at [www.nysba.org/CLEOrderForm](http://www.nysba.org/CLEOrderForm)
- Online** [www.nysba.org/CLE](http://www.nysba.org/CLE)  
[www.nysba.org/SoloConference2017](http://www.nysba.org/SoloConference2017)

This program will also be  
streamed as a live Webcast

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