



Risk & Practice Management Resources

The Lawyers' Insurance Association of Nova Scotia <<http://www.lians.ca/>> has a Risk & Practice Management Advisor on staff ready to assist members in managing their practices more effectively and minimizing their exposure to claims. All information received by the Risk & Practice Management Advisor is confidential and will not be disclosed to the Nova Scotia Barristers' Society unless required by law or requested to do so by the member to whom the information pertains. Deborah E. Gillis, Q.C. is the Risk & Practice Management Advisor and can be reached by telephoning 423-1300 or by sending an e-mail to dgillis@lians.ca.

Periodicals

The Society Record (2005 -) Periodical Rack & Aisle 23

Beginning in December 2005, the Lawyers' Insurance Association of Nova Scotia's Risk & Practice Management Advisor has contributed a column to *The Society Record* entitled, "Tips from the Risk & Practice Management Advisor". These columns, which cover topics such as winding down a practice, securing electronic data, succession planning, and fraud prevention, are also available online through the Lawyers' Insurance Association of Nova Scotia's website <<http://www.lians.ca/>> and Secondary Sources <http://www.nsbs.org/library_search.php>.

National (1996 -) Periodical Rack & Aisle 23

The *National* is the official magazine of the Canadian Bar Association and reports on trends and developments in the legal profession and the practice of law. Of particular interest is the CBA PracticeLink column, which offers practice-related information and advice on a range of topics, including technology, work/life balance, professional responsibility, and marketing. The current issue, as well as archived issues from the past several years, can be accessed online at <<http://www.cba.org>>.

Canadian Lawyer (1983 - 2008) Aisle 22

The *Canadian Lawyer* includes an irregular column entitled, "Law Office Management". Recent topics covered in the column include hiring, compensation schemes, parental-leave, retirement, launching a solo practice, and client identification rules. Selected articles from the current issue are available online at <<http://www.canadianlawyermag.com/>>.

LAWPRO Magazine

LAWPRO Magazine is a publication of the Lawyers' Professional Indemnity Company in Ontario. The magazine provides articles, tips, and resources on risk management and claims prevention. The current issue, as well as archived issues from the past several years, can be accessed online at <<http://www.practicepro.ca/LAWPROMag/default.asp>>.

Law Practice (1991 -) Periodical Rack & Aisle 23

Law Practice: The Business of Practicing Law is the flagship publication of the American Bar Association's Law Practice Management section. This magazine provides hands-on tips and how-to advice to lawyers on marketing, management, technology, and finance as it relates to the business of practicing law. The articles draw upon the expertise of lawyers, administrators, executives, and decision makers from law firms of all sizes, as well as consultants and advisors

	<p>to the legal profession. The current issue, as well as archived issues from the past several years, can be accessed online at <http://www.lawpractice.org>.</p> <p><i>Law Practice Today</i> This free, monthly e-publication is a supplement to <i>Law Practice</i> magazine and highlights new articles on a current legal topic. Like <i>Law Practice</i> magazine, it also provides tips and advice on marketing, management, technology, and finance. The current issue, as well as archived issues from the past several years, can be accessed online at <http://www.lawpractice.org>.</p> <p>The <i>Index to Canadian Legal Literature</i> provides citations to articles found in scholarly journals, as well as citations to other periodicals, books, government publications, audio-visual material, continuing legal education material, and case comments. Search for legal literature by author, title, subject, case, or statute. The <i>Index to Canadian Legal Literature</i> is available in print as part of the <i>Canadian Abridgment</i>, as well as electronically via Westlaw Canada's LawSource (database identifier: ICLL) and LexisNexis Quicklaw.</p>
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Texts	<p>Client Relations Burg, Bob. <i>Endless Referrals: Network Your Everyday Contacts Into Sales</i>, 3d ed. (Toronto: McGraw-Hill, 2006). KB 267.P2 B954 2006</p> <p>Ewalt, Henry W. <i>Through the Client's Eyes: New Approaches to Get Clients to Hire You Again and Again</i>, 3d ed. (Chicago: ABA, 2008). KB 267 E94 2008</p> <p>Foonberg, Jay G. <i>How to Get and Keep Good Clients</i>, 2d ed. (Beverly Hills, Cal.: Foonberglaw, 2007). KB 267 F686H 2007 / Oversize Collection</p> <p>Morgan, J. Harris & Jay G. Foonberg. <i>How to Draft Bills Clients Rush to Pay</i>, 2d ed. (Chicago: ABA, 2003). KB 261 M848 2003</p> <p>Communication McRae, Brad & David Brooks. <i>The Seven Strategies of Master Presenters</i> (Franklin Lakes, N.J.: Career Press, 2004). KB 109 M174 2004</p> <p>Shipley, David & Will Schwalbe. <i>Send: The Essential Guide to Email for Office and Home</i> (New York: Alfred A. Knopf, 2007). K 11.S1 S557 2007</p> <p>Stone, Douglas, Bruce Patton & Sheila Heen. <i>Difficult Conversations: How to Discuss What Matters Most</i> (New York: Penguin Books, 2000). KB 11.S1 S877 2000</p> <p>Spence, Gerry. <i>How to Argue and Win Every Time: At Home, At Work, In Court, Everywhere, Everyday</i> (New York: St. Martin's Press, 1995). KB 269 S744 1995</p> <p>Ury, William. <i>Getting Past No: Negotiating in Difficult Situations</i> (New York: Bantam, 1993). KB 60 U72 1993</p> <p>Marketing American Bar Association, Law Practice Management Section. <i>The Lawyer's Guide to Effective Yellow Pages Advertising</i> 2d ed. (Chicago: ABA, 2005). KB 267.M2 A512Y 2005</p> <p>MacDonagh, Catherine Alman & Beth Marie Cuzzone. <i>The Law Firm Associate's Guide to Personal Marketing and Selling Skills</i> (Chicago: ABA, 2007). KB 267.M2 M135 2007</p>
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Snyder, Theda C. *Women Rainmakers' Best Marketing Tips*, 2d ed. (Chicago: ABA, 2003). KB 252 S675 2003

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Knight, Patricia S. *Ethics and Practice Management for Paralegals* (Toronto: Emond Montgomery, 2006). KB 270.L5 K69 2006

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Pinson, Linda. *Anatomy of a Business Plan: The Step-by-Step Guide to Building a Business and Securing Your Company's Future*, 7th ed. (Tustin, Cal.: Out of Your Mind . . . And Into the Marketplace, 2008). KB 267 P658 2008

Susskind, Richard. *The End of Lawyers?: Rethinking the Nature of Legal Services* (Oxford: Oxford University Press, 2008). KB 252 S964 2008

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Amos, Daniel P. *People-First Management: Creating a Culture of Trust* (Mill Valley, Cal.: KANTOLA Productions, 2001). KB 267 L416M 2006 DVD / Ask staff for assistance in locating this material

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Lencioni, Patrick. *The Five Dysfunctions of a Team: A Leadership Fable* (San Francisco, Cal.: Jossey-Bass, 2002). KB 267.P2 L563 2002

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Vogt, M. Diane & Lori-Ann Rickard. *Keeping Good Lawyers: Best Practices to Create Career Satisfaction* (Chicago: ABA, 2000). KB 252 V887 2000

Wren, Harold G. & Beverly J. Glascock. *The Of Counsel Agreement: A Guide for Law Firm and Practitioner*, 3d ed. (Chicago: ABA, 2005). KB 267 W945 2005 + CD-ROM

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Foonberg, Jay G. *How to Start and Build a Law Practice*, 5th ed. (Chicago: ABA, 2004). KB 267 F696 2004

Gibson, K. William & Joel P. Bennett. *Flying Solo: A Survival Guide for the Solo and Small Firm Lawyer*, 4th ed. (Chicago: ABA, 2005). KB 267 A512F 2005

Greene, Arthur G. *The Lawyer's Guide to Governing Your Firm* (Chicago: ABA, 2009). KB 267 G799L 2009 + CD-ROM

Grella, Thomas C. & Michael L. Hudkins. *The Lawyer's Guide to Strategic Planning Defining Setting and Achieving Your Firm's Goals* (Chicago: ABA, 2004). KB 109 G825 2004 + CD-ROM

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Malone, Gerry. *Anatomy of a Law Firm Merger: How to Make or Break the Deal*, 3d ed. (Chicago: ABA, 2004). KB 267 M257 2004 + CD-ROM

McLaughlin, Paul. *Welcome to Reality: A New Lawyer's Guide to Success* (North York: Ont.: CCH, 2000). KB 267 M161 2000

Nischwitz, Jeffery L. *Think Again!: Innovative Approaches to the Business of Law* (Chicago: ABA, 2007). KB 267 N722 2007

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Halliwell, Tanis. *Take Your Soul to Work: Transform Your Life and Work* (Toronto: Random House, 1999). K 11.S1 H476 1999

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Keava, Steven. *Transforming Practices: Finding Joy and Satisfaction in the Legal Life* (Chicago: Contemporary Books, 1999). KB 265 K26 1999

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Records Management

Barr, Jean, Beth Chiaiese & Lee R. Nemchek. *Records Management in the Legal Environment: A Handbook of Practice and Procedure* (Lenexa, Kan.: ARMA, 2003). KB 56 B268 2003

Cunningham, George C. & John C. Montana. *The Lawyer's Guide to Records Management and Retention* (Chicago: ABA, 2006). KB 56 C973 2006 + CD-ROM

Mark, Teri J. *Organize Your Office: A Small Business Survival Guide to Managing Records* (Lenexa, Kan.: ARMA, 2003). KB 267 M345 2003

Spurzem, Bob & Bill Tolson. *Emailing Archiving for Dummies* (Hoboken, N.J.: Wiley Publishing, 2008). KB 56 S772 2008

Technology

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Time Management

Allen, David. *Getting Things Done: The Art of Stress Free Productivity* (New York: Penguin Books, 2001). KB 11.S1 A425 2001

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Fitzsimmons, Sharon. *Type and Time Management: A Timely Collection of Stories, Ideas, and Suggestions from People of 16 Different Personality Types* (Edmonton, Alta.: Psychometrics Canada Ltd., 2001). KB 74 F562 2001

Library & Information Services' Online Resources: The Textbooks/Treatises Catalogue <<http://www.nsbs.org/librarydatabases.php?page=CATQBE>> lists all texts available at the Barristers' Library in Halifax, as well as at county barristers' libraries. To find other texts on the topic of risk and practice management, search the catalogue using subject headings such as "associates", "computers", "fees", "information storage and retrieval systems", "law as a profession", "law firms", "law office automation", "law offices", "lawyer and client", "lawyers", "marketing", "mental health", "mergers", "office management", "office practice", "personnel management", "practice of law", "record retention", "retirement", "risk management", "self-help", "stress management", "succession planning", "technology", "time management", and "work environment".

<p>CLE & CPD</p>	<p>Canadian Bar Association, Ontario Branch. <i>Practice Tips for Developing a Successful Legal Practice: Marketing, Networking, Rainmaking, and Establishing a Clientele</i> (Toronto: CBAO, 2004). KB 267 C212P 2004 / Oversize Collection</p> <p>Law Society of Upper Canada, Continuing Legal Education. <i>Practice Workshop: Opening Your Law Practice</i> (Toronto: LSUC, 2005). KB 267 C762P 2005 / Oversize Collection</p> <p>Nova Scotia Barristers' Society, Continuing Professional Development. <i>Calling All Sole Practitioners: Risk and Practice Management Seminar</i> (Halifax, N.S.: The Society, 2009). KB 267 N935C 2009 / Oversize Collection / available online via Secondary Sources</p> <p>Nova Scotia Barristers' Society, Continuing Professional Development. <i>Taking Care of Business: From Invoice to Intake</i> (Halifax, N.S.: The Society, 2008). KB 265 N935 2008 / Oversize Collection / available online via Secondary Sources</p> <p><u>Library & Information Services' Online Resources: Secondary Sources</u> http://www.nsbs.org/librarydatabases.php?page=2dSourcesBQBE provides access to a wide range of secondary sources, including papers presented at Continuing Professional Development and Continuing Legal Education Society of Nova Scotia conferences. To find other secondary sources on the topic of risk and practice management, use the advanced search screen with subject headings such as "advertising", "automation", "checklists and systems", "communication", "computer programs", "computers", "employees", "files and filing", "law as profession", "law firms", "law office automation", "law offices", "lawyer and client", "lawyers", "legal profession", "life skills", "loss prevention", "mentoring", "office management", "personnel management", "practice of law", "retirement", "risk management", "self-help", "stress management", "succession planning", "technology", and "time management".</p>
<p>Websites</p>	<p>Lawyers' Insurance Association of Nova Scotia http://www.lians.ca/ The Lawyers' Insurance Association of Nova Scotia (LIANS) administers the mandatory professional liability insurance program for members of the Nova Scotia Barristers' Society. Practice support, in the form of articles, precedents, checklists, and other useful tools can be found on the LIANS's website.</p> <p>Nova Scotia Lawyers Assistance Program http://www.nslap.ca/ The Lawyers Assistance Program (LAP) is a confidential referral and counselling service administered through the Lawyers' Insurance Association of Nova Scotia. LAP assists members of the legal profession, their staff, and their families with work-related, health, or personal problems. Assistance from LAP is available 24-hours a day by telephoning 1-866-299-1299.</p> <p>CBA PracticeLink http://www.cba.org/cba/PracticeLink/Home/ The CBA PracticeLink page includes articles, tips, podcasts, an RSS feed, and other resources on clients, finances, leadership, work/life balance, marketing, solo practices, and technology.</p> <p>LAWPRO: Lawyers' Professional Indemnity Company http://www.lawpro.ca/default.asp LAWPRO provides professional liability insurance to over 22,000 members of the Law Society of Upper Canada. This website includes access to LAWPRO's practicePRO initiative, which provides information to Ontario's lawyers about risk management, claims prevention, and practice management. The practicePRO area of the website includes links to checklists,</p>

precedents, and other practice aids on a variety of topics; the “managing” series of booklets providing advice on issues ranging from the management of lawyer/client relationships to law firm finances; information on wellness and balance; technology-related articles and practice tips; and access to the “Avoid a Claim” blog.

Law Society of British Columbia’s Practice Support Pages

<<http://www.lawsociety.bc.ca/>>

The Law Society of British Columbia’s website includes a number of practice support pages. The site includes an extensive list of articles, papers, precedents, and checklists on a range of topics, including confidentiality, privacy, conflicts of interest, technology, client service and communications, office organization, marketing, leaving or moving a law practice, and personal assistance.

Law Society of British Columbia’s Practice Support Pages: Succession Planning

<http://www.lawsociety.bc.ca/practice_support/succession.html>

The Law Society of British Columbia’s practice support pages includes a section devoted solely to succession planning to assist lawyers in meeting their professional and ethical obligations in the event of death, disability, impairment, and incapacity.

Law Society of British Columbia’s Practice Support Pages: Locums

<http://www.lawsociety.bc.ca/practice_support/locums.html>

The Law Society of British Columbia’s practice support pages includes a section devoted solely to locums. A locum is a lawyer who steps in to manage the practice of another lawyer who is absent from the office for vacation, sick leave, or some other reason. This page provides information on who should consider a locum, how to find an appropriate locum, how to establish yourself as a locum, and the ethical issues associated with locums.

Law Society of British Columbia’s Small Firm Practice Course

<<http://www.lawsociety.bc.ca/>>

The Small Firm Practice Course is a 16-module course from the Law Society of British Columbia aimed at helping sole practitioners and small firm lawyers manage their practices effectively. Topics include trust accounting, file management systems, taxation, file retention and disposal, conflicts, dealing with clients and avoiding fraud. To access this course, go to the Society’s home page, click the guest log in link to online courses, and set up a guest account.

Law Society of British Columbia’s Building Your Practice Course

<<http://www.lawsociety.bc.ca/>>

A 5-module course from the Law Society of British Columbia aimed at helping sole practitioners and small firm lawyers build their law practice. Topics include business planning, client development, client satisfaction, technology, and coping with isolation. To access this course, go to the Society’s home page, click the guest log in link to online courses, and set up a guest account.

Law Society of Upper Canada’s Practice Resources

<<http://rc.lsuc.on.ca/jsp/home/practiceResourcesHome.jsp>>

The Law Society of Upper Canada’s website includes a Practice Resources page. Although much of the information on these pages is directed at lawyers in Ontario, some of the more general information may be useful, including guides to bookkeeping for lawyers and paralegals, guides to opening and closing a law practice, and practice management guidelines.

American Bar Association's Law Practice Management Section

<<http://www.abanet.org/lpm>>

The American Bar Association's Law Practice Management (LPM) Section provides practical information to lawyers on the business of practicing law, particularly in the core areas of marketing, management, technology, and finance. The LPM website also provides resources for young lawyers building their careers, as well as women in the profession. Links to LPM's various publications – *Law Practice Magazine*, *Law Practice Today*, and *Law Technology Today* – are available on the website.

American Bar Association's Legal Technology Resource Center

<<http://www.abanet.org/tech/ltrc/>>

The American Bar Association's Legal Technology Resource Center (LTRC) is staffed by professional librarians and technology experts and provides information on legal technology and trends. The LTRC's website includes valuable online resources, including an articles page updated monthly, electronic discussion forums, and presentations given by LTRC staff at conferences and continuing legal education seminars. The LTRC also provides consulting, outreach, and research services to ABA members.

American Bar Association's CLE Now!

<<http://www.abanet.org/cle/cle-now/>>

CLE Now! is a service provided by the American Bar Association's Center for Continuing Legal Education. CLE Now! provides on-demand, complimentary continuing legal education courses as streaming audio or video via the World Wide Web. Courses are free to all ABA members, while others are available to anyone who visits the website. Users must sign-in. Check the site for system requirements. A limited number of continuing legal education programs are also available as complimentary podcasts, which can be accessed at <<http://www.abanet.org/cle/podcast/>>.

Library & Information Services' Online Resources: Legal Links

<<http://www.nsbs.org/library/databases.php?page=LLQBE>> provides access to legal information on the World Wide Web. To find other websites on the topic of risk and practice management, search the Legal Links database using subject headings such as "law as a profession", "lawyer and client", "lawyers", "office management", "practice assistance", and "practice of law".