

# Law Society of Ontario

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## Presentation to Federation of Ontario Law Associations



**Law Society**  
of Ontario

**Barreau**  
de l'Ontario

Friday, May 10, 2019

# Strategic Plan-

## Enhanced communications with the public

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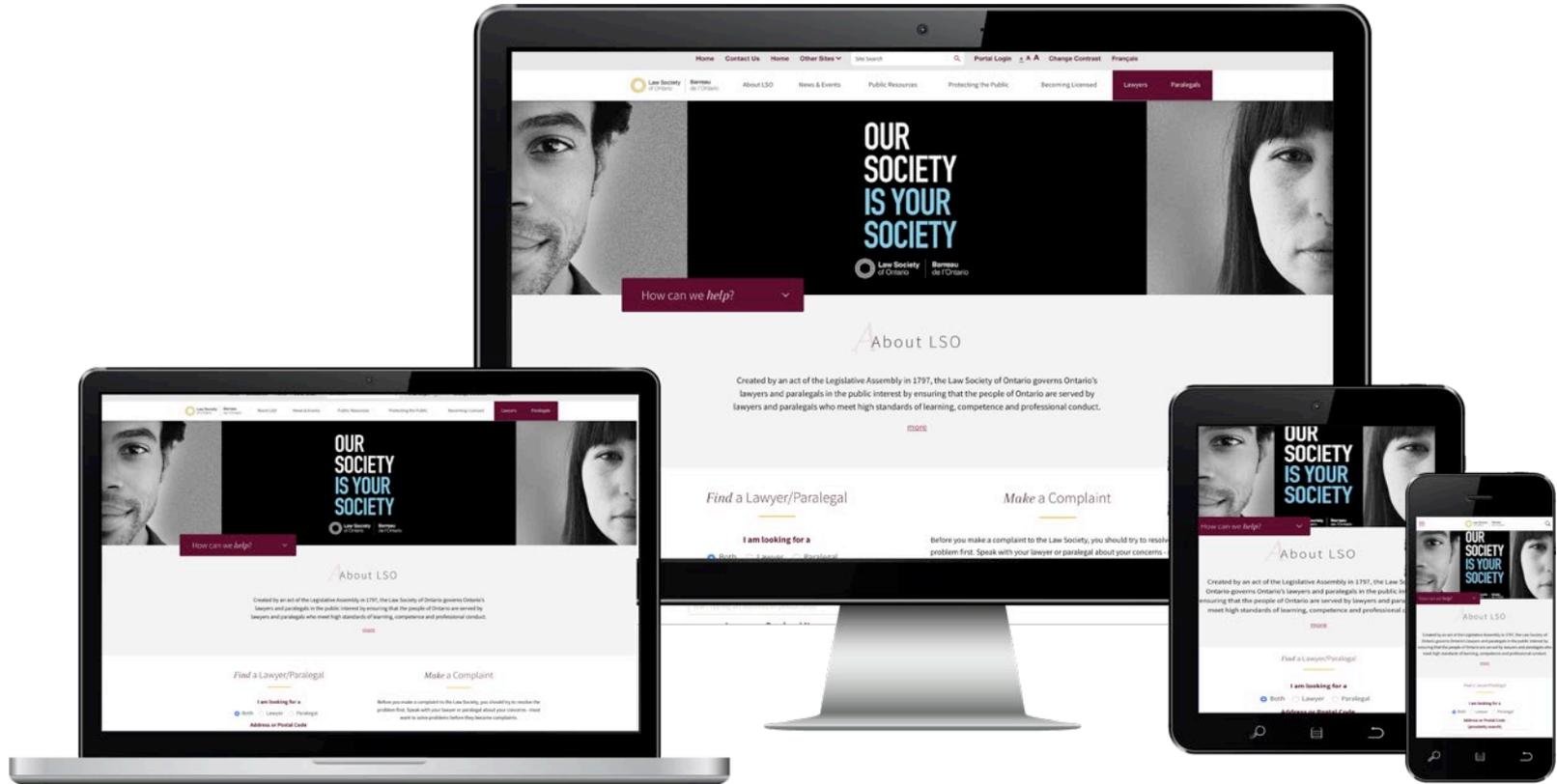


**Law Society**  
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- Name change
- New website

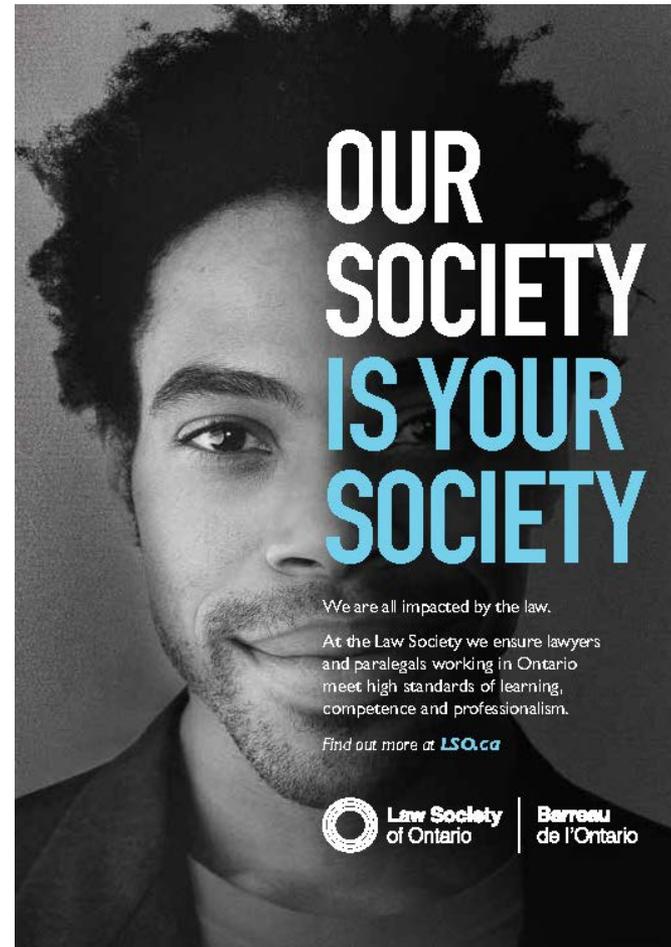
# Website Redesign



# Campaign – Phase I

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- New name
- Simple CTA





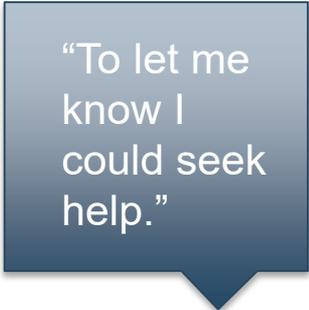
# 2018 Outcomes

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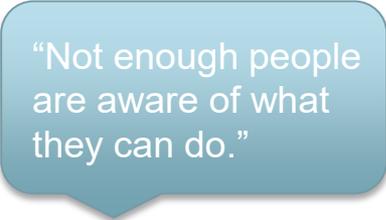
People who encountered the campaign intuitively understood the reason behind it:



“To make people aware of the organization.”



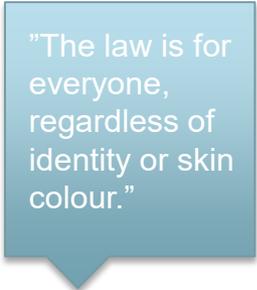
“To let me know I could seek help.”



“Not enough people are aware of what they can do.”



“To be aware of our rights when needing lawyers and paralegals.”



“The law is for everyone, regardless of identity or skin colour.”

Nearly half of respondents have a positive prompted response to the campaign.



# Phased Approach

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## PHASE 1 (2018)

### INTRODUCE

Launch the new identity and provide high-level overview of key responsibilities.

## PHASE 2 (2019)

### BUILD RELEVANCE

Help Ontarians understand the LSO's role: why it matters to them and affects their lives.

Incorporate strong member campaign

# Building Relevance: One Brand - Two Streams

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## Member Connection

### CHANNELS:

- e-Newsletters: e-Bulletin, Paralegal Update, Convocation Update
- Website/Gazette
- Law Society Social Channels - LinkedIn, Facebook, Twitter, Instagram
- Ontario Reports
- Law Society events
- Stakeholder update
- Proactive media relations

## Public Connection

### MARKETS:

- North – Timmins, Sudbury, North Bay
- East – Kingston, Cornwall, Ottawa
- North East – Belleville, Peterborough, Barrie
- Golden Horseshoe – Toronto, Mississauga, Hamilton, Oshawa, Markham
- Western – Guelph, Kitchener, London, Sarnia, Windsor

### LANGUAGES:

English, French/Bilingual  
Diverse Markets (South Asian, Hispanic, Arab/Muslim, Asian, African, Caucasian, Indigenous)

# 2019 Public Campaign

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A call to action focused on the three core services/resources that are to be highlighted in order to begin creating awareness and relevance.

- Lawyer and Paralegal Directory: Helps you find legal help based on your location and the specific area of the law in which you are seeking advice.
- The Law Society Referral Service: an online tool that can direct you to a lawyer or paralegal for up to 30 minutes of free consultation.
- Law Society Public Resources: (website, brochures, your law videos, choosing the right legal professional etc.): Information on the most common legal questions/issues people experience and online resources such as Steps to Justice, a collaborative project led by CLEO, which can also help with information on a range of legal topics.

# 2019 Member Campaign

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Focus: The Law Society is here to help you and support your competence/practice. We provide many resources and services to lawyers and paralegals free of charge.

Campaign to highlight:

- Practice Support and Resources (website)
- Practice Management Helpline
- CPD Programs and Resources
- Coach and Advisor Network (CAN)

Call to action: Visit [lso.ca/YourSource](http://lso.ca/YourSource) to access all our resources/services for licensees.



2019

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# Creative Concept



**Law Society**  
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# START HERE

## *Helpful Legal Tools & Resources*

The Law Society of Ontario has a range of resources and tools to help you. To find a lawyer or paralegal in your area check our **Lawyer and Paralegal Directory**. To consult with a lawyer or paralegal on your legal options for up to 30 minutes, free-of-charge, connect with our **Law Society Referral Service**. And to find helpful information on a range of topics, from divorce and child custody to small claims court matters, see our **Public Resources**. Find all this and more on our website.

**LSO.ca**



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**OUR SOCIETY**  
**IS YOUR SOCIETY**



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# YOUR SOURCE

## *Supports for Lawyers and Paralegals*

The Law Society of Ontario is here to help lawyers and paralegals with supports and resources. Whether you are opening, expanding or winding down your practice, start here to access programs, tools and information that can help you meet your goals, visit [LSO.ca/YourSource](https://www.lso.ca/YourSource)



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**180,000**

**points of contact between  
Professional Development &  
Competence and professions in 2018**

An aerial photograph of a dense, lush green forest. The trees are packed closely together, creating a textured canopy of various shades of green. In the center of the image, the text "See the Forest and the Trees" is written in a large, bold, white sans-serif font, spanning across the middle of the frame.

**See the Forest  
and the Trees**

# Opening Your Practice



Law Society  
of Ontario

Barreau  
de l'Ontario



# START HERE

How can we *help?* ▼

## A About LSO

Created by an act of the Legislative Assembly in 1797, the Law Society of Ontario governs Ontario's lawyers and paralegals in the public interest by ensuring that the people of Ontario are served by lawyers and paralegals who meet high standards of learning, competence and professional conduct.

<https://lso.ca/public-resources>



Barreau de l'Ontario

About LSO

News & Events

Public Resources

Protecting the Public

Becoming Licensed

Lawyers

Your Source

Paralegals

- Coach and Advisor Network (CAN)
- Member Assistance Program
- Equity Supports & Resources
- Rules of Professional Conduct
- Practice Management Guidelines
- Practice Management Topics
- Practice Area Resources
- Business Structures
- Practice Management Helpline

Law Society Portal

Your Source

About Your Licence

Practice Supports & Resources

Enhancing Competence & CPD

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Member Assistance Program

Equity Supports & Resources

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Practice Management Guidelines

Practice Management Topics

Opening, Operating or Closing a Practice

The Lawyer-Client Relationship

Managing Files

Managing Money

Working with Others

Technology Practice Tips

Practice Area Resources

Business Structures

# Practice Management Topics

These resources have been developed to assist lawyers with understanding their obligations under the *Rules of Professional Conduct* and the Law Society's *By-Laws*, as well as with ensuring proper practice management. However, subject to any legal, by-law, or *Rules* requirements, these resources are not intended to replace a lawyer's professional judgment. Each practice management issue should be assessed within the context of the lawyer's own law practice.

## OPENING, OPERATING OR CLOSING A PRACTICE

Opening Your Practice

Business Structures

Practice Arrangements

Contingency Planning for Lawyers

Membership Status and Fee Paying Category

Closing Your Practice

Your Source

About Your Licence +

Practice Supports & Resources -

Coach and Advisor Network (CAN) +

Member Assistance Program

Equity Supports & Resources +

Rules of Professional Conduct

Practice Management Guidelines +

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The Lawyer-Client Relationship

Managing Files

Managing Money

Working with Others

Technology Practice Tips

Practice Area Resources +

Business Structures

Practice Management Helpline

Enhancing Competence & CPD +

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[Should I Open My Own Practice?](#)

[Defining Your Practice](#)

[Office Space](#)

[Computer Systems for Your Practice](#)

[Setting Up Your Office](#)

[Business Structure or Practice Arrangement](#)

[Business Registrations](#)

[Bank Accounts, Accounting and Other Financial Issues](#)

[Insuring You and Your Practice](#)

[Building Your Support Team](#)

[Marketing Your Practice](#)

[Networking](#)

[Mentoring](#)

[Administrative Requirements](#)

[Practice Management](#)

[Contingency Planning for Your Practice](#)

[Office Manual](#)

[Preparing a Business Plan](#)

**Appendices**

[Appendix 1 - Letter To Law Society Of Ontario](#)

[Appendix 2 - Law Office Inventory Checklist](#)



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Opening, Operating or Closing a Practice

The Lawyer-Client Relationship

Managing Files

Managing Money

Working with Others

Transitioning a Practice

# Appendix 4 - Developing a Law Firm Business Plan

## Developing a Law Firm Business Plan

The following worksheet leads you through each of the categories of a basic law practice business plan. Although the practice of law is a profession... law practice is a business. Careful planning increases the opportunity for a successful practice without the unanticipated surprises that cause practices to fail.

### 1. EXECUTIVE SUMMARY

#### A. Description of the Law Firm

[brief summary paragraph]

# Building your Practice



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## TECHNOLOGY PRACTICE TIPS

### Practice Tips

The [Practice Management Review Basic Practice Management Checklist](#) provides a general review of topics. If the specific practice topic that you are interested in is not listed above, we may not have developed a resource for it yet. You may wish to search for past [Law Society CPD articles](#) related to practice management topics or search the Law Society's library resources using [InfoLocate](#) to retrieve books, journals, articles, and online information on your topic.

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### MANAGING FILES

File Management

File Retention and Destruction

### MANAGING MONEY

Bookkeeping Guide for Lawyers

Fees and Disbursements

Harmonized Sales Tax (HST)

Cash and Money Laundering

Private Mortgages

Trust Accounts

Overdue Accounts and Collections

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Appendix includes:  
Internal Control Self-Assessment Guide

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## Internal Control Self Assessment Guide

*Internal Controls are processes you put in place to help you run your practice more efficiently by reducing the risk of errors and fraud.*

This guide is designed primarily for sole practitioners and lawyers in small law firms who may not have the resources to implement a formal control structure. However, many of these suggestions can be used in any size law firm. Even with limited resources, you can reduce the risks by:

- knowing how your law firm's accounting system works
- being familiar with the Law Society's record keeping requirements in By-Law 9
- knowing how to set up and maintain proper books and records
- being aware of the Law Society's money handling requirements in By-Law 9
- being actively involved in the financial activities of your firm
- supervising the accounting and finance functions of your firm

# Contact Information

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