

LEGAL PRACTICE MANAGEMENT COURSE PRESENTERS

All Courses

Dr Ian Chung
Frances Moffitt
Virginia Shirvington

Sole Practitioners

Stephen Burke
Trish Carroll
Andrew Chen
Greg Dwyer
Thea Foster
Michael Joyce/Judy Bourke
Linda Julian
Andrew Perry
Natasha Playne
Janice Purvis
Susan Jones, Caroline Kessler & Len Upex of LawWare

35+ Partners

Dr Rosemary Howell
Linda Julian
Trish Carroll
Ray Gould
Kevin Fox
Ronwyn North

Partnerships (2-9 & 10-34)

Andrew Chen
Dr. Rosemary Howell
Andrew Perry
Natasha Playne
Linda Julian
Trish Carroll
Ray Gould
Janice Purvis
Susan Jones, Caroline Kessler & Len Upex of LawWare

Corporate / Government Solicitors

Philip Chown
Jennifer Duxbury
Jane Walton
Trish Carroll
Linda Julian
Natasha Playne
Ronwyn North

Trish Carroll

Principal, Galt Advisory Pty Ltd

From 1993 until 2003 Trish was responsible for the marketing and business development activities of Minter Ellison. During this time Minter Ellison became recognised as a market leading law firm in the Asia Pacific and experienced significant growth.

In January 2004 Trish established her own advisory firm, Galt Advisory Pty Ltd. Galt specialises in advising (mainly) law firms on:

- marketing and business strategy
- business development
- brand development and management
- bid strategy and tender preparation
- client targeting and relationship management programs

As Galt Advisory Trish has a base of firms of diverse sizes and geographic locations for whom she provides advice and counsel ranging from facilitating partners' conferences and business planning sessions, developing marketing strategies and overseeing implementation, conducting client research, preparing tenders, bids and assorted business development proposals, delivering training programs focused on business development, client relationship management and brand issues.

Trish is an accomplished speaker, regular commentator on law firm management and marketing issues; she has written a regular column in the Law Council's Law Management Journal since 2005. She is a former Council member of the Australian Marketing Institute and a former National President of the Australasian Professional Services Marketing Association (APSMa)

Andrew Chen

Chartered Accountant with considerable experience in the professional services sector.

In particular, Andrew's experience in professional service firms comes from working with both leading national firms and sole practitioners over many years developing an understanding of the unique issues they face and tailoring solutions to fit their needs.

He works closely with firms on their transition to incorporation, financial integration and mergers, funding structures, creating lead KPI measurements, facilitating financial strategy and advising on service trust requirements.

Recently he was involved with the ATO on service trusts and the use of alternative firm structures.

He has a keen interest in practice profit improvement strategies, tax planning, structures and performance measurement of professional service firms. He presents regularly to new partners of law firms on financial and tax issues.

Philip Chown

Philip Chown has substantial in-house practising experience as a senior lawyer in Australian corporations. He was admitted as a lawyer in 1986. He practised in-house with a major Australian bank for more than 17 years until 2005. He holds combined degrees from UNSW in Commerce (Accountancy major) & Law.

In 2005 he was recruited by Cuscal Ltd which provides wholesale banking services in Australia to establish an incorporated legal practice (ILP) for Cuscal as the sole shareholder. He was the foundation Board Chair and the Legal Practitioner Director who took principal responsibility for the practice until November 2007. The ILP provided specialist banking and finance legal services to credit unions, building societies, a brand name finance company and a small foreign bank which operates in Australia. He wrote all the ILPs internal procedures including its conflict of interest policy and project managed the installation of the legal practice management software which allowed the legal practice to keep files fully electronically and dispense with paper files.

Philip is a past NSW President and past National Vice-President of the Australian Corporate Lawyers Association (ACLA) and served on the NSW Law Society Council for 8 years 1992-98 and during that period chaired the Ethics Committee for two years. During his leadership of the Ethics Committee he was responsible for the adoption by the Law Society Council of its first ever Statement of Ethics - an aspirational document which for the first time wrote down in plain language the fundamental ethical principles by which lawyers practice.

Dr Ian Chung

LawCare Counsellor, Law Society of New South Wales

Dr Ian Chung has been a General Practitioner for 40 years, and has a special interest and expertise in psychological medicine having completed a Masters course in psychiatry. He is a former member of the NSW Medical Registration Board and continues to play a role in reviewing the conduct of medical practitioners on behalf of the Health care Complaints Commission.

He has been the Law Society's LawCare counsellor since its inception in 1991. He has consulted with and helped a wide range of Legal practitioners including solicitors, barristers and judiciary with problems arising from the stress and pressures of practice and personal life.

A full CV is available on his website www.ianmchung.com. He discusses his approach on ABC Radio National, "Conversation Hour with Richard Fidler" 8/10/2007.

Jennifer Duxbury

General Counsel, ninemsn

Jennifer started her professional life at Baker McKenzie in Melbourne where she worked for two years before she moved to London, and continued to work overseas for the next 14 years.

In 1998 Jennifer moved to Singapore to take up the position of General Counsel for Reuters Asia Pacific & Japan. She was a member of the senior management team for the Asia/Pacific region and had responsibility for managing all legal affairs in the Asia Pacific and Japan (23 countries), with staff of nine lawyers and three paralegals.

The Reuters Global Legal Department as a whole was recognised for its outstanding performance by being awarded in June 2001 the Global Legal Department of the Year at the Blue Chip Legal Awards in London. This award is given based on votes cast by all FTSE100 companies and the top 100 law firms in the UK.

In 2002 Jennifer returned to Australia and took up the position of General Counsel for Airservices Australia, a Commonwealth owned statutory corporation. In this role she had responsibility for the management of all legal affairs for the corporation whose core function is the provision of air traffic control and its infrastructure and related services within Australian administered airspace.

Jennifer managed a team of five lawyers and two paralegals. Jennifer's major achievements at Airservices included recruiting a high calibre legal team, establishing a legal compliance function and re-engineering the legal function to ensure greater involvement into the corporation's strategic initiatives.

Jennifer taught information and communications in the Law School at Canberra University for two years, and subsequently was Acting General Counsel at Lonely Planet Publications Pty Ltd during 2008. She is now General Counsel for ninemsn.

Thea Foster

BCom FCA APS,

Director, Added Value Corporation Pty Ltd

Thea is a chartered accountant who successfully established and grew her own accounting firm. Over time, Thea admitted a partner, repurchased his interest, merged her firm and later sold out of the merged firm.

During the last ten years Thea has consulted to accountants and solicitors on Practice Management and Marketing issues. As an Accredited Professional Speaker member of the National Speakers Association of Australia, Thea has spoken widely at conferences and meetings and has conducted training workshops. Thea has worked with law firms on issues of Practice Valuation and Partner Entrances and Exits,

Presentation topics include:

- Better Business Planning
- Financial Skills for Non Accountants
- Improving Work in Progress and Debtors
- What Do Clients Really Want?

Thea also designs and conducts workshops tailored to meet client requirements. Clients include:

- The College of Law
- The Institute of Chartered Accountants in Australia
- CPA Australia and various finance industry organisations

The emphasis in Thea's presentations is for participants to have fun, become motivated, obtain useful information and to work out how to apply that information in their daily activities.

Kevin Fox

HR Manager NSW/ACT, CB Richard Ellis

Kevin Fox is a senior Human Resources practitioner who has extensive experience in Professional Services and Media & Entertainment sectors and has a Master of Business in Employment Relations, UTS.

He is currently the NSW / ACT Human Resources Manager for CB Richard Ellis where he has implemented change management programs, undertaken reviews and restructures of business lines and is currently reviewing the remuneration and benefits strategy and framework.

Kevin was Director of Human Resources at Ebsworth & Ebsworth Lawyers from 1998 to 2007 and specialised in developing and implementing attraction and retention strategies, OD and change management initiatives and enhancing leadership capabilities of the partnership.

He subsequently set up his own company which provides short term people and development expertise to businesses in areas ranging from providing HR through to leadership, strategic and business planning activities to developing integrated performance management and professional development systems.

From 1989 to 1998 Kevin worked in HR for the Australian Broadcasting Corporation, culminating in his role as Human Resources Manager, Radio.

Ray Gould

*CEO of Cutler Hughes & Harris from 1997 – 2005
General Manager, Tax Division at Ernst & Young Sydney from 1991 – 1996*

At Cutler Hughes & Harris he was responsible for a new strategic direction for this long established Sydney firm, achieving increased productivity, a doubling of revenue, increased net profit by 60% and a doubling of partner income over 3 years.

Ray is now regional manager at Ipac Securities Limited.

Dr Rosemary Howell

Chairman, Strategic Action Pty Ltd

Rosemary Howell has experience as a lawyer, teacher, strategic planner and CEO. Through her company, Strategic Action Pty Ltd, she delivers strategic planning and management consulting services to a diverse range of national and international business and government clients.

As a result of studying and teaching in the Harvard Negotiation Program she now teaches Negotiation and Dispute Resolution at the University of New South Wales and she has added negotiation training and support to her range of consulting services.

She has consulted to nearly 2000 law firms in Australasia, Europe, USA and South Africa and has recently received her Ph.D for her doctoral thesis on 'Negotiating with Lawyers'; a qualitative study of the experiences of those for whom and with whom lawyers negotiate.

Increasingly her consulting work involves coaching business leaders in building and managing effective teams and repairing and enhancing working relationships.

Linda Julian

Linda offers strategic practice development counsel to lawyers and other expert professionals throughout Australia, New Zealand and South East Asia.

She works with professionals to:

- win business in the face of tough competition
- devise effective strategic plans
- drive practice development
- create profitable and sustainable professional practices which satisfy and delight external and internal stakeholders.

She has earned a reputation for rapid and insightful problem diagnosis plus creative, pragmatic (and sometimes fierce) analysis and wise advice. Clients attest that Linda's advice makes an enormous difference to their outcomes.

Linda has experience as a non-executive director and audit committee chairperson in the ASX-listed company environment. She is also on the Board of Epilepsy Australia. She advises boards and executive committees of professional firms.

The daily financial press frequently seeks Linda's comments on lawyer-related issues. Scores of her articles and papers on professional management issues have appeared in leading professional journals. Worldwide subscribers to Linda's popular and topical weekly eTips business development column now number around 10,000.

She lectures on marketing, strategic management, and professional practice development at post-graduate level and presents the marketing components of the mandatory partner admission course for the NSW College of Law as well as LawCover's client relationship management module..

With the support of her team, Linda has conducted many important and large-scale research projects including attitudinal studies with major consumers of legal services and other expert services and regularly surveys legal services usage by insurance, financial services, banking, property, and public sectors.

She conceived and strategised the first-ever transition of a legal practice to prepare as a publicly listed company.

Her book, "the Passionate Professional: creating value, success and prosperity" has been sold in 19 countries.

Linda Julian received her undergraduate education in behavioural sciences and law at University of Sydney and Macquarie University and then completed a Masters degree at Macquarie Graduate School of Management. Current academic activity is directed towards her doctoral thesis.

Linda lives the principles and models the values and beliefs she articulates.

Alan McArthur

Managing Partner, Dibbs Abbott Stillman Lawyers

Alan joined Dibbs Abbott Stillman's Sydney Office as Managing Partner in August 2007. His primary role is to develop and implement a future strategy for the firm. Prior to his appointment at DAS, Alan was a Managing Partner at a major national firm, as well as being the firm Chief Executive of a New Zealand firm.

Alan's experience has ensured he has extensive expertise in leading professional service firms in Australia and New Zealand.

Professional experience:

- Managing partner, Minter Ellison, Sept 1999 – Dec 2006
- Chief Executive Officer, Simpson Grierson, Jul 1995 – 1999
- Managing partner, Finalyson's, Adelaide, Jun 1991 – July 1995
- Litigation Partner and Managing Partner, Macphillamy Cummins & Gibson, Canberra, June 1983 – 1991

Professional/Business associations

- Member, Sydney Chapter of World Presidents Organisation
- Former Chairman, General Practice Section of the Law Council
- Editor of Australian Legal Practice from 1990-1995
- Board positions in private companies and charitable organisations

Frances Moffitt

Regulatory Compliance Support Solicitor – Professional Standards Department, Law Society of New South Wales

Fran has Professional qualifications in Accountancy and Law. She has considerable experience both as a solicitor and investigator. Her professional knowledge and experience includes taxation; insolvency; proceeds of crime and 8 years as a trust account investigator.

In 2004 and 2005, as a Senior Trust Accounts Investigator, Fran played an integral role in the introduction of the new trust accounting regime for law practices. She has as a detailed knowledge of the Legal Profession Act 2004; the Legal Profession Regulation 2005 and the Solicitors Practice rules.

In 2006 Fran was appointed to a new unit within the Professional Standards Department at the Society- the Regulatory Compliance Support Unit. In this role Fran has a strong consultative and education focus in the areas of trust accounts; practising certificates; practice structures – partnerships and incorporated legal practice.

The introduction of the RCSU forms part of the Society's policy to support practitioners with compliance and regulatory assistance.

Ronwyn North

Managing Director, Streeton Consulting Pty Ltd

As a legal practice consultant and legal educator, Ronwyn is on a mission to help lawyers make practice more profitable, more satisfying and less risky

Professional liability risk management activities include

- Provider of risk management education for leading law firms, law departments, legal education providers and legal professional indemnity insurers.
- In 2004, Ronwyn's contribution to risk management education in Australia was recognised when Streeton was a joint winner of an inaugural Australian Risk Management award in the category of *Best Risk Management Training and Education Program* for its annual programs for Law Mutual (WA).
- Researcher and author/co-author of many studies and articles on how lawyers get sued and how to avoid it, including the leading Australian study (Streeton Report) and the book from the study called *Managing Client Expectations & Professional Risk*. For a number of years she wrote a regular risk management column in publications such as NSW Law Society Journal and LexisNexis Law Practice Management Newsletter.

Other activities

- Accredited consultant for Team Management Systems including profiling on attitudes to risk.
- Provider of a range of other learning and development, human capital and practice management services of the genre *"Everything law school never taught you about being a good lawyer"*.
- Previously a quality systems evaluator for the 'Best Practice Program' (which has been rolled into Law 9000).

Lawyer by qualification

- Previously a principal in general practice in both NSW and Victoria.

Andrew Perry

Director - Legal & Technology, legal.consult pty ltd

Andrew Perry is a specialist intellectual property and technology lawyer who after 10 years in traditional law firms, decided to leverage his technology skills to form an innovative multidisciplinary firm, legal.consult.

legal.consult provides legal advice as well as technology and communications consulting services to a range of clients across the technology, telecommunications, corporate and non-profit sectors. The firm is a specialist provider of "Free and Open Source Software" based solutions to organisations needing document management, client relationship management, knowledge management, time management and project management tools at an affordable price. The firm also provides IT support and maintenance services.

Andrew is President of the NSW Society for Computers & the Law and is a member of the Law Society's Legal Technology Committee and the Law Council of Australia's e-commerce Committee. He has degrees in Accounting and Law and as an intellectual property lawyer has had a long standing passion for good design and effective branding and marketing.

Natasha Playne

Partner, CFO Strategic and Principal, Playne Speaking

Natasha was admitted as a member of the Institute of Chartered Accountants in Australia in 1989, and has had a broad range of experience, both in Australia and overseas, in both small and large practices.

During the early part of her career Natasha developed a specialism in litigation support services, and later in forensic accounting. This work gave her good insights into the workings of the legal profession, because of her involvement in a wide variety of insurance claims as well as matters in litigation.

After working for a number of years for Horwath in Brisbane, Natasha moved to London, where she joined RGL International, a boutique firm of forensic accountants. During her four years with RGL her work took her to destinations across the UK, Europe and South East Asia.

In 1995 she returned to Australia to establish the Sydney Office of RGL International as the sole employee, and was appointed a partner of the international firm in 1988. By 1999 Natasha had a staff of 12 and a turnover normally associated with a two-partner practice, but due to family commitments left the partnership in 2001.

From 2001-2003 Natasha was a director in Ernst & Young's Litigation Consulting Services division. Since that time Natasha has worked as a freelance consultant, including a foray into the world of entertainment as a technical advisor to the ABC television movie about forensic accountants, "Loot" starring Jason Donovan.

Natasha is now a partner of CFO Strategic where she specialises in offering interim CFO services for accounting and legal practices and SMEs.

During her career Natasha has regularly spoken at seminars and delivered training workshops to several life insurance companies. Her articles have been published in professional journals including the Law Society Journal and the Journal of the Australian Insurance Institute. Natasha has written a chapter on damages in personal injury cases for the loose-leaf publication "*Australian Product Liability Law and Practice*" and is about to be published in the forthcoming edition of the text "*Accounting Concepts and Applications*" by Greig, Mackay, Beaumont & Sagner.

Janice Purvis

Risk Management Services, LawCover

Janice Purvis was appointed Risk Services Manager in December 2006, having originally joined LawCover as a Claims Solicitor in October 2000. As a claims solicitor Janice investigated and defended professional negligence claims against solicitors.

Prior to joining LawCover, Janice worked as an Investigations Solicitor with the Professional Standards Department of the Law Society of NSW. In this position she conducted investigations

into conduct complaints against solicitors made to the Office of the Legal Services Commissioner and worked in conjunction with Receivers, Managers and Investigators appointed to solicitors' practices. For a period Janice also worked as an Ethics Solicitor at the Law Society, providing advice to the profession.

Previously, Janice worked in private practice and other non-law related fields. Janice holds a Diploma in Law from the Legal Practitioners Admission Board and a Diploma in Teaching, specialising in intellectually disadvantaged students.

Virginia Shirvington

B.A., LL.B (Syd.)

Legal Ethics Education Consultant

Admitted as Solicitor of the Supreme Court of New South Wales 25 June 1976.

For most of her professional life Virginia's specific area of practice has been Ethics and Professional Responsibility for solicitors, coupled with considerable experience as a solicitor in commercial, personal injury, family law and solicitors' disciplinary litigation.

Virginia's primary work at present is as a Legal Ethics Education Consultant and a consulting lecturer to the College of Law.

Between March 1992 and April 2006 Virginia was the Senior Ethics Solicitor at The Law Society of NSW heading a team of Ethics Solicitors advising the profession on common and difficult ethical dilemmas, writing policy guidelines, and providing Ethics education through authorship of a monthly Ethics column in the Law Society Journal between February 1994 and July 2006 and the presentation of ethics seminars, lectures and discussion groups. Thereafter her work was primarily devoted to lecturing at The College of Law, teaching Professional Responsibility in an on-line course for overseas practitioners seeking admission in NSW, in the Practical Legal Training course (face-to-face), in the Professional Program Online and presenting Ethics/Professional Responsibility components of the Legal Practice Management Course for practitioners qualifying for an unrestricted practising certificate and writing, reviewing and advising on Professional Responsibility Practice Papers.

Virginia's most recently published article was 'Conflicting duties- where does the balance lie?' in the July/August 2008 edition of *Precedent* the bi-monthly journal of the Australian Lawyers Alliance. Virginia also writes regular reviews for the Law Society Journal of publications involving ethics generally as well as other topics.

Virginia was an expert witness on legal professional ethics in recent Supreme Court litigation.

Jane Walton

Principal, The Watton Group

Jane Walton is a skilled lawyer, ethicist, practising non executive director and corporate governance expert. Jane has practised as a solicitor in general commercial law, and in law reform. Jane was one of the founders of the St James Ethics Centre in 1989 and served on the board of management for ten years. On behalf of the Ethics Centre, she initiated and carried out a national enquiry into values in education throughout Australia, and wrote and published the Discussion paper *Educating for a Good Society: a national conversation*, culminating in the first ever national symposium of educators to consider values issues and their implications for all levels of education in Australia.

For over 25 years, in her work, Jane has helped individuals and organisations unravel their legal and ethical dilemmas drawing out the underlying human issues, the processes, and often the clashes of values, in order to improve their decision-making and effectiveness. She is an extremely effective teacher, facilitator and presenter who readily adjusts her style for audiences of all sizes, types and levels of expertise and experience. She is a former Senior Fellow of Melbourne University Law School, has significant expertise in culture, group and social analysis and cross cultural management issues. In 2007 Jane was appointed as one of the Australian Institutes of Company Directors' 6 core national facilitators teaching its Company Directors Course, the International programme, and the advanced programme, 'Mastering the Board Room'. She is the co-author of "How to Identify and Manage Conflicts of Interest" for company directors published by the AICD and is a frequent keynote speaker and commentator on governance issues at public events and in the media.