

practicePRO's risk management program

In 2012 practicePRO became a part of LAWPRO's new Claims Prevention and Stakeholder Relations department, allowing its risk management message to be better integrated with LAWPRO's communication and government/public relations efforts. The core mission of practicePRO remains the same: to help lawyers avoid claims in the first place. The practicePRO brand remains a widely-recognized and well-respected provider of tools and resources to help the practising bar identify practice risks and take steps to minimize their claims exposure.

A quick look at the numbers shows that practicePRO materials and resources reached more lawyers and their staff than ever before.

- **112 presentations** on risk management topics to law associations, law firms and continuing professional development programs in Ontario, other provinces and the United States, with total **audience over 9,000** combined. (To book a presentation for your firm or CDP program session, email practicepro@lawpro.ca)

- **Over 1,600** followers of @LAWPRO and @practicePRO on Twitter



- **153 requests** for books from the Lending Library



- **191 posts** on AvoidAClaim, and **over 166,000 visits**



- **Over 322,000 downloads** of practicePRO material (up **33%** in five years)



LAWPRO Risk Management Premium Credit

In order to avoid confusion with the Law Society of Upper Canada's mandatory CPD program, LAWPRO changed the name of its CPD Premium Credit to the LAWPRO Risk Management Premium Credit. The name also does a better job conveying the aim of the credit: to encourage lawyers to attend CPD programs that we feel have a strong risk and practice management component.



- **213 CPD programs** were approved for the 2013 LAWPRO Risk Management Premium Credit, with total attendance of **53,000**.

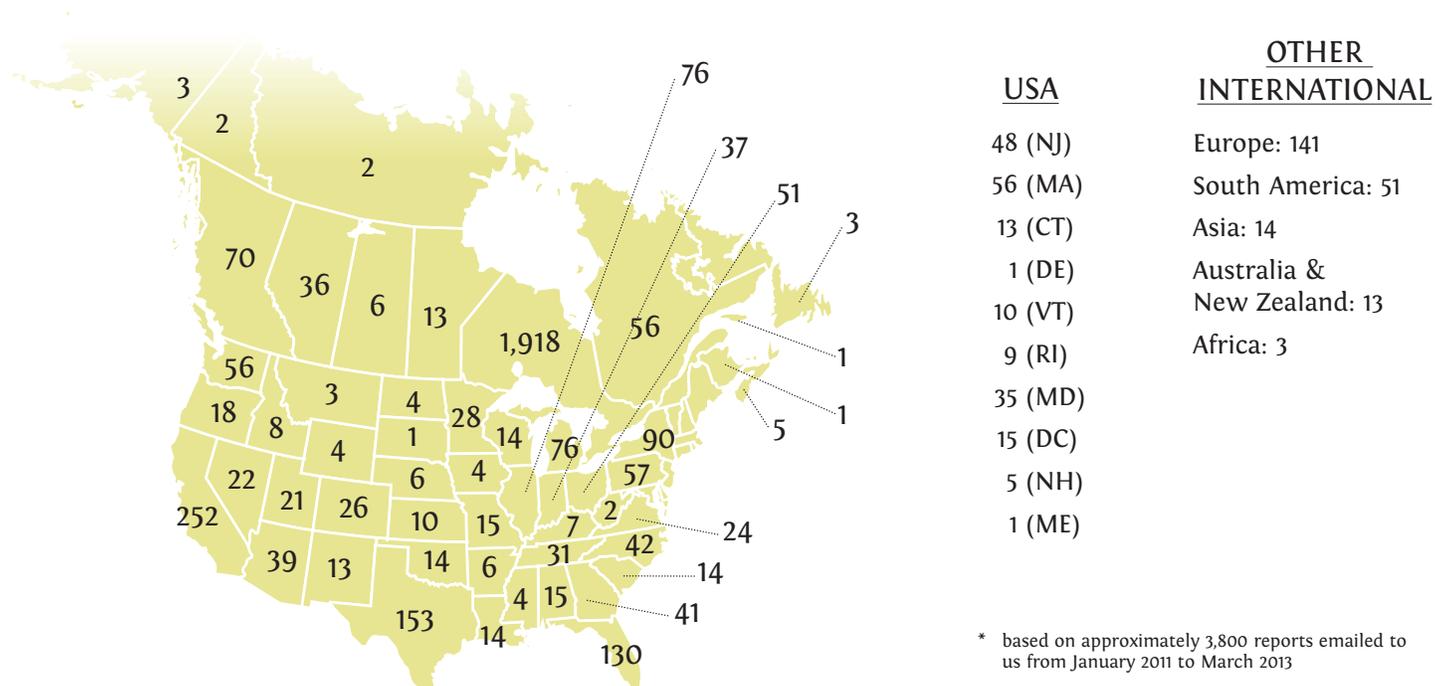
New Checklists

In the August 2012 edition of *LawPRO Magazine* we introduced two new resources aimed at helping family law and corporate/commercial lawyers avoid claims resulting from poor communication and inadequate investigation.

- The Domestic Contract Matters Toolkit consists of a *client intake form* and *checklist*, a *client assignment sheet* and an *execution meeting checklist*. Following the steps listed in the checklists and forms will make sure nothing is missed by the lawyer, and just as importantly, that there is a paper trail documenting the work that was done and the communications with the client that occurred.
- The Commercial Transaction Checklist contains a series of questions lawyers should ask themselves to help ensure that the commercial documents they are drafting correctly reflect the client's instructions and expected results.

AvoidAClaim Blog

2012 continued to see a steady stream of suspicious emails forwarded to fraudinfo@lawpro.ca, resulting in nearly 120 warnings posted on AvoidAClaim in 2012 (out of 191 total posts) relating to unique fraudster names. Last year we published a map showing just how widespread the problem of lawyer-targeted email frauds was. After 1,300 additional emails in 2012 (with half continuing to come from lawyers outside Ontario) we've updated the map. We've now heard from lawyers in every province and U.S. state, and 70 countries around the world.



Full details of bad cheque frauds and other kinds of fraud, as well as how you can spot the red flags, can be found in the LawPRO Fraud Fact Sheet.

In addition to the many fraud-related posts, AvoidAClaim has also begun posting content from practicePRO's extensive archive of articles and resources. Each week lawyers will find posts on a book in our Lending Library, an article from an earlier *LawPRO Magazine*, a practicePRO resource and an original post by Nora Rock, LawPRO's corporate writer/policy analyst. As well, the blog will continue to be updated with current practice and risk management news.

LAWPRO Magazine

practicePRO continues to get out the risk management message through a variety of print and electronic media. *LAWPRO Magazine*, the flagship publication, put out issues focusing on lawyers changing firms, taking the time to slow down and avoid mistakes on client matters, and an end of the year 'New Year's resolutions issue'.

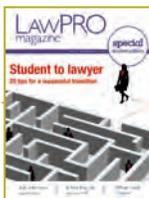
Highlights from *LAWPRO Magazine*:

January



January 2012 – Making the Right Move

- **Recruiting & Training Top Talent:** Six law firms talk about how they recruit the best lawyers and create the right environment to retain them.
- **Is This the Job You Want?:** Advice from a career coach on how lawyers should approach an interview.
- **Unbundled Legal Services: Pitfalls to Avoid:** LAWPRO outlines the claims risks lawyers face when taking on a limited retainer.



April 2012 – LAWPRO Magazine (Student Edition)

- **Student to Lawyer: 20 Tips for a Successful Transition**
- **Is This the Job You Want?**
- **What New Lawyers Need To Know About LAWPRO's Mandatory Professional Liability Insurance**
- **What I Wish I Knew in Law School**
- **Essential LinkedIn Do's and Don'ts for Law Students**



May/June 2012 – Year in Review

- **Real Estate Lawyers – The Buck Stops With You:** A reminder that lawyers bear the ultimate responsibility for work that is too often delegated to clerks without adequate supervision.



August 2012 – Taking the Time to Get it Right

- **Inadequate Investigation/Discovery Now the #1 Cause of Claims** – a look at this growing cause of claims that are the result of lawyers not taking the time to fully understand their clients' needs.
- **Diversify Without Dabbling** – A reminder to lawyers who may want to expand their practice areas to make sure they are fully competent to do so.
- **A Domestic Matters Contract Toolkit and Corporate/Commercial Checklist** to help lawyers ensure they've asked all the right questions and covered all the topics that should be asked.



December 2012 – Resolutions for a Better Practice

- **Resolutions for a Healthier Law Practice and a Better You:** Features checklists for how lawyers can improve their practice and avoid claims in several areas of law as well as various aspects of law practice management.
- **Avoiding Communication Based Claims – Tips for Litigators:** Steps litigators can take to avoid misunderstandings with clients as to how their cases will proceed and likely outcome.

December

2012

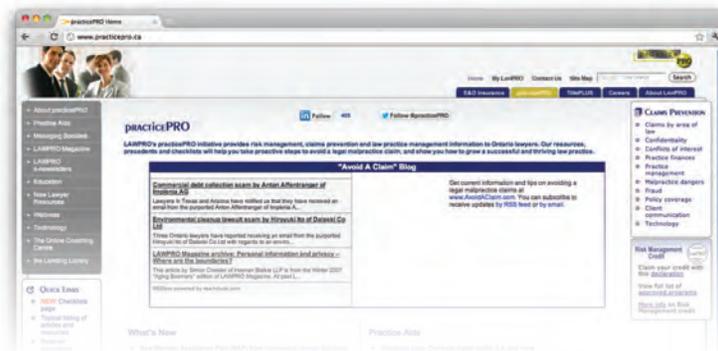
LAWPRO Magazine Student Edition

In 2012 LawPRO launched its first magazine aimed at law students. It was distributed to the law schools in Ontario and featured both original content focused on students and newly called lawyers as well as content from *LAWPRO Magazine* adapted for this audience. This will be an annual edition and we feel it's a great way to provide articles that give students practical advice as well as introducing them to LawPRO and our claims prevention message.

special
student edition

- **Student to Lawyer – 20 Tips for a Successful Transition:** These tips cover the new lawyer's career path from deciding what type of firm one wants, to networking and job hunting, to interviewing, to fitting in well at a new firm.
- **Essential LinkedIn Do's and Don'ts for Law Students:** A guide for new lawyers looking to use LinkedIn to network and build their online profile.

Top 10 Downloads in 2012 from practicePRO.ca:



E-Discovery Reading List

6,698

Sample Budget Spreadsheet

6,095

LawPRO Fraud Fact Sheet

5,657

Business Plan Outline (from *Managing the Finances of Your Practice* booklet)

4,866

General Retainer Letter Precedent

4,656

Capacity Assessment article by Judith Wahl

4,655

Employee Departure Checklist

4,613

Overview of *Limitations Act, 2002*

4,031

Sitting on a Non-Profit Board: Risk Management Checklist

3,850

The Dangers of Metadata from *LAWPRO Magazine*

3,534