



Union Internationale des Avocats  
International Association of Lawyers  
Unión Internacional de Abogados

Attending this event will grant you CLE credits in most jurisdictions!

## UIA Training Course

# Leadership, Management and Marketing of a Law Firm

Thursday, June 1 & Friday, June 2, 2017



#UIMarktg

## LISBON – PORTUGAL

UIA ■ T +33 1 44 88 55 66 ■ F +33 1 44 88 55 77  
[uiacentre@uianet.org](mailto:uiacentre@uianet.org) ■ [www.uianet.org](http://www.uianet.org)

## INTRODUCTION & GENERAL INFORMATION

The UIA is proud to present this Course which is part of the UIA 2017 Training Courses Programme. The objective of our Training Courses is to provide comprehensive tools in specific and/or specialist areas of the law or in specific projects, by offering advanced-level “master classes” held by outstanding expert trainers.

The UIA aims to provide excellence at reasonable cost, given its non-profit nature and institutional role. The course is held over two days, with 2 trainers. The sessions will be highly interactive.

**Minimum number of participants: 15 / Maximum number of participants: 32**

## COURSE VENUE

**Vieira De Almeida & Associados**

Av. Duarte Pacheco, 26

1070 - 110 Lisbon – Portugal

### Who should attend?

- Senior partners, Managing Partners, heads of department, team leaders, supervisors, practising lawyers, office managers, practice managers, marketing partners, head of marketing, heads of business development and team leaders.
- All members of the law firm who want to develop their skills in leadership, management, marketing and communication of his/her firm, department or own practice.
- All those who advise lawyers on these skills.

### Reasons for attending: outcomes from the training

- Understanding of the increasingly high expectations of clients. Clients are systematically monitoring and assessing legal performance and expecting dynamic pro-activity, creativity and innovation. It is important to understand and meet these expectations.
- An increase in your skills, knowledge and understanding of how to:
  - Win, keep and grow the clients you want, cost-effectively
  - Increase effectiveness and efficiency within the firm
  - Maximise return on investment of all the resources of your firm
- Confirmation that what you are doing is correct and:
  - To generate new ideas
  - To increase motivation
  - To revise and refresh knowledge
  - To revise, practise and to up-date skills
  - Tips and techniques to use and traps to avoid
  - Practical, relevant, time-saving advice which is immediately applicable

### Methodology for the presentation of the training

- Sessions are conducted in a whole variety of ways, including: presentations, PowerPoint, delegates working individually, in pairs, in small groups, in larger groups, as a whole.
- Interactive participation by the delegates includes: case-studies, role plays, quizzes, exercises, practicals, questionnaires, templates, checklists, problem-solving and theory-to-practise sessions.
- Discussions allow delegates to share their experiences with others and have constructive problem-solving discussions, which lead to practical and relevant solutions and lessons learned.
- Personal Action Plan - each individual creates a Personal Action Plan, of actions that they will carry out when they return to work. They can then immediately apply what they have learned as soon as they get back to the office from the training

### Working language

The sessions will be held in **English without simultaneous translation**.

### Accreditation of courses

Every participant attending the entire 2 days Training Course programme will receive a “Certificate of Attendance” at the end of the Course that may be used for obtaining “Credits” for “Continuing Legal Education” - “Continuing Professional Development” purposes, depending on national rules. For more information, please contact the UIA.

## REGISTRATION FEES

	UIA Member		Non Member	
	<= 01.05.2017	> 02.05.2017	<= 01.05.2017	> 02.05.2017
<b>STANDARD REGISTRATION</b> <i>Amounts exclusive of VAT</i>	<b>€ 490.00*</b>	<b>€ 540.00*</b>	<b>€ 540.00*</b>	<b>€ 590.00*</b>
<b>YOUNG LAWYER (&lt;35)**</b> <i>Amounts exclusive of VAT</i>	<b>€ 200.00*</b>			

\* The VAT (23%) can be applied to the amount here above according to the European Directive 2006/112/CE of November 28, 2006. For more information, please contact the UIA. **If you provide an EU VAT ID number, the VAT will not be charged.**

\*\*Please attach proof of age to the registration form to benefit from young lawyers fee

These fees cover participation in the Course, the welcome cocktail on Wednesday, May 31, 2017, coffee breaks, lunches on Thursday, June 1 & Friday, June 2, 2017, as well as the documentation. The dinner on Friday, June 2, 2017, is optional and at additional charge. Please note that the number of places in this Training Course is limited. The maximum number of participants is 32. Since we expect this training programme to fill up quickly, if you are interested, we suggest that you register immediately and benefit of the lower rate.

Applications will only be processed upon receipt in full of the registration fees. Admission will be on a first come - first served basis. The organisers reserve the right to refuse admission in the event of excess applications.

## HOTEL RESERVATION

Each participant should make his/her own arrangements for hotel accommodation in Lisbon. The website [www.booking.com](http://www.booking.com) might be helpful to find a hotel at walking distance.

A few hotel suggestions nearby are:

*Dom Pedro Palace Hotel 5\*, Epic Sana Lisboa Hotel 5\*, HF Fénix Lisboa Hotel 4\*, Turim Av. Liberdade Hotel 4\*,  
Vincci Liberdade Hotel 4\*, HF Fénix Garden Hotel 3\*, Sana Rex Hotel 3\**

## CANCELLATION CONDITIONS

All cancellations will be subject to a 50% deduction and will have to be sent in writing, to be received by the Union Internationale des Avocats **no later than May 1, 2017**. No refund will be made for cancellations received after this date.

**VISAS:** Anyone who requires a visa invitation letter in order to attend the training course should register and pay their registration fees **no later than May 1, 2017** to ensure there is enough time to obtain a visa.

All cancellations due to a visa refusal will be refunded in full, minus €50 + VAT to cover administrative costs, provided that the UIA has received the registration documents and **total registration fees no later than May 1, 2017**.

If you register after this date, only 50% of the amount paid minus €50 + VAT to cover administrative costs will be refunded for cancellations due to visa refusals.

All cancellations due to a visa refusal must be sent in writing and reach the UIA **before the training course**. Cancellations must be accompanied by a **proof of visa refusal**.

If your visa is issued after the training course date or if you do not have proof of visa refusal, you will not be entitled to a refund.

## GENERAL CONDITIONS

All registrations received by the Union Internationale des Avocats (UIA) along with the full payment of fees corresponding to the events selected will be confirmed in writing.

**The VAT (23%) can be applied to the amount here above according to the European Directive 2006/112/CE of November 28, 2006.**

The UIA reserves the right to cancel or postpone the training course to a later date, change the training course venue and/or programme, make any corrections or modifications in the information published in the training course programme and cancel any invitation to participate in the training course, at any time and at their entire discretion, without having to provide any reasons for the same.

Neither the UIA, nor any of its managers, employees, agents, members or representatives shall be held responsible for any loss or damage, of any nature, suffered (directly or indirectly) by a delegate, accompanying person or a third party following any cancellations, changes, postponements or modifications.

**The UIA strongly advises participants to subscribe to modifiable and/or refundable services, as well as to take out a cancellation insurance.**

Neither the UIA, nor any of its managers, employees, agents, members or representatives shall be held responsible for any loss or damage, of any nature whatever, suffered (directly or indirectly) by a delegate or accompanying person, except in case of death or personal injury due to gross negligence by the UIA.

The contractual relations between the UIA and each participant (delegate or accompanying person) in relation to the training course are subject to French law and jurisdiction, to the exclusion of any other law. Paris is the city of jurisdiction.

## FORMALITIES

It is the responsibility of participants to ensure compliance with police, customs and health formalities for their journey. Participants unable to take part in the training course because of their inability to take a flight or any other means of transportation due to being unable to provide the documents required (passport, visa, vaccination certificate, etc.) cannot claim any reimbursement.

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## INFORMATION

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## THE TRAINING TEAM



**Pippa BLAKEMORE**, BSc, PGCE  
The PEP Partnership LLP  
Reading, United Kingdom  
E [pippa.blakemore@pep-partnership.co.uk](mailto:pippa.blakemore@pep-partnership.co.uk)

Pippa Blakemore has been advising law firms all over the world on the creation of strategy and its implementation since 1985, when she set up PEP. Pippa has worked for more than 80 regional, national and international law firms, as a consultant, or on an interim, project or *ad hoc* basis. For example, she has advised on more than 90 winning pitches and worked with more than 6,000 lawyers in all practice areas and in all sizes of law firms.

Pippa started her academic life as a mathematician, after which she studied Politics, Philosophy and Economics, and graduated from the University of Bristol in Politics, followed by a Post-Graduate Certificate in Education in History also from Bristol University. Her clients also include government bodies, global corporates, not-for-profit organisations and charities, which gives her a first-hand understanding and experience of the challenges facing the clients of law firms, and hence she can advise law firms accordingly.

Pippa Blakemore's advice to her clients includes: strategy creation and implementation, business development, rainmaking, client relationship management, leadership, management skills, project management, communication strategies and skills, problem solving, recruitment, appraisals, mentoring, coaching, speech writing, speech making, marketing and media management, public relations. Pippa has presented to lawyers all over the world, including Europe, United States, Canada, Africa, Mexico, South America, New Zealand and in Dubai.

Pippa's extensive writing includes publications in articles, on websites and chapters in books on: business development, marketing and training for lawyers, which have been published on several continents and in several languages, including Catalan, Spanish, French and Finnish. She has also published on European politics and education, food and wine. Pippa's books are "Law Firm Pitches & Tenders: Presenting to Win" published by Worldwide Legal Research in October 2014 and "Networking for Lawyers: a pocket guide to building business relationships" published in October 2011. Pippa Blakemore is a Freeman of the City of London, which entitles her to drive sheep and cattle across London Bridge.



**Tiago MARREIROS MOREIRA**  
Vieira de Almeida & Associados - Sociedade de Advogados, RL  
Lisbon, Portugal  
E [tm@vda.pt](mailto:tm@vda.pt)

Tiago Marreiros Moreira is a leading international tax lawyer and is head partner of Vda's Tax practice (that includes a team specially dedicated to Private Clients). Law Degree, Catholic University of Lisbon Faculty of Law. Post-Degree in Taxation, Instituto Superior de Gestão, in Lisbon. PIL at Harvard Law School.

He has been involved in several transactions, in Portugal and abroad, mainly focused on the financing, acquisition and restructuring of national and multinational economic groups and corporations. He has also been actively providing domestic and international tax planning for major corporations, assisting groups in the definition of transfer pricing policies and documentation, resolving tax disputes with revenue authorities, providing advice in securitization transactions and estate planning.

Tiago has also been involved in numerous transactions in Africa and actively provides tax planning advice to major local and international clients in Portuguese speaking countries. He is the author of several articles published in national and international publications and is lecturer at the Postgraduate Course in Management of Social Organizations of Economics at the Catholic University of Porto.

Admitted to the Portuguese Bar Association, by whom he was recognized as a specialist lawyer in Tax Law, tax arbitrator certified by the Minister of Justice. He is President of the UIA Management of Law Firms Commission, Former President of the UIA Tax Law Commission, member of the International Fiscal Association and of the Portuguese Tax Association, member of the International Fiscal Association, of the Portuguese Tax Association and of the Portuguese Tax Consultants Association.

In 2007 he received the Iberian Lawyer's "40 under forty" award for the best young lawyers in Iberia and is also ranked by the most prestigious international directories, such as Chambers, Legal 500, Who is Who, International Tax Review, PLC Which Lawyer and Iberian Lawyer.

Wednesday, May 31, 2016

Welcome cocktail

19:30 Welcome cocktail kindly offered by Vieira De Almeida & Associados  
Av. Duarte Pacheco, 26 – 1070 - 110 Lisbon – Portugal

Thursday, June 1, 2017

DAY 1: LEADERSHIP AND MANAGEMENT

08:30 – 09:00	REGISTRATION OF PARTICIPANTS
09:00 – 09:15	<b>Introductions</b> <b>Objectives</b> <b>Personal Action Plans</b>
09:15 – 09:45	<b>1. Leadership requirements</b> <ul style="list-style-type: none"> <li>- Creating a vision</li> <li>- Identifying mission</li> <li>- Key questions to ask and answer</li> <li>- Developing your plan to implement this strategy</li> </ul>
09:45 – 10:30	<b>2. Leadership skills</b> <ul style="list-style-type: none"> <li>- Inspiring people to support chosen direction</li> <li>- Managing change</li> <li>- Growing the firm</li> <li>- Decision-making</li> <li>- Effective communication</li> </ul>
10:30 – 10:45	COFFEE BREAK
10:45 – 11:15	<b>3. Managerial skills</b> <ul style="list-style-type: none"> <li>- Deal with issues before they become crises</li> <li>- Creative problem solving</li> <li>- 10 steps for effective delegation</li> </ul>
11:15 – 11:45	<b>4. Creating cost-effective structures, processes and procedures</b> <ul style="list-style-type: none"> <li>- What is an effective structure for a law firm?</li> <li>- Standardising processes</li> <li>- Streamlining procedures</li> </ul>
11:45 – 12:30	<b>5. Finance</b> <ul style="list-style-type: none"> <li>- Fee structures, estimates and quotes</li> <li>- Profit share structures</li> <li>- Value for money and “added value”</li> <li>- Fee negotiation</li> <li>- Billing and recovery</li> </ul>
12:30 – 14:00	LUNCH
14:00 – 15:00	<b>6. Attract, retain and motivate staff</b> <ul style="list-style-type: none"> <li>- Recruitment, retention and motivation</li> <li>- Managing staff and their well-being</li> <li>- Appraisals which motivate: partners; lawyers and all employees in the firm</li> <li>- Training, development and career planning for all in the firm</li> <li>- Managing difficult people</li> </ul>
15:00 – 15:15	COFFEE BREAK
15:15 – 16:00	<b>7. Project Management for law firms</b> <ul style="list-style-type: none"> <li>- What is a project?</li> <li>- Types of project in a law firm: characteristics and requirements</li> <li>- Actively managing projects in the best interests of the client and the firm</li> </ul>
16:00 – 16:30	<b>8. Developing personal skills</b> <ul style="list-style-type: none"> <li>- Time management: 5 Ds for increasing productivity and reducing stress</li> <li>- Know yourself and what you want</li> </ul>
16:30 – 17:15	<b>9. Panel discussion together with Partners from UIA law firms</b>

If you are interested in representing your firm during the panel discussion, please kindly contact **Tiago Marreiros Moreira** by email: [tm@vda.pt](mailto:tm@vda.pt)

17:15 – 17:30

**10. Feedback and Action Plans**

**Friday, June 2, 2017**

**DAY 2: LAW FIRM MARKETING**

09:00 – 09:45

**1. Legal Marketing: Winning Clients**

- Ethical legal marketing goals
- Networking
- Building relationships
- How to follow-up with enthusiasm not desperation

09:45 – 10:30

- Turning contacts into clients
- Writing new business proposals
- Winning mandates

10:30 – 10:45

COFFEE BREAK

10:45 – 12:30

**2. Client relationship management: retaining and growing loyal clients**

- What do your clients want and how do they want it?
- 4 activities clients do not have time to do
- Prepare a Client Relationship Strategy
- Obtain and utilise client feedback
- Turn complaints into opportunities
- Deal with difficult clients

12:30 – 14:00

LUNCH

14:00 – 14:30

**3. Branding**

- Legal brand: What brand are you?
- Advantages of a strong brand
- How to stand out from the crowd
- Communicating your brand

14:30 – 15:30

**4. Create your firm's marketing strategy**

- What are the challenges, rules and limits on marketing?
- Identifying key characteristics of your current markets
- How to break into a market
- Appropriate allocation of the resources you have
- Monitor and measure success

15:30 – 15:45

COFFEE BREAK

15:45 – 16:15

**5. Implement your marketing plan**

- Create your plan to support and implement the strategy
- What you can and should do
- Structure, content and use of a website
- PASHMINA checklist
- Maximising return on your investment in events
- Social media management

16:15 – 17:00

**6. Panel discussion together with Partners from UIA law firms**

If you are interested in representing your firm during the panel discussion, please kindly contact **Tiago Marreiros Moreira** by email: [tm@vda.pt](mailto:tm@vda.pt)

17:00 – 17:30

**Action Plan and the way forward  
Feedback and certificates**

20:00

Optional dinner

Venue to be confirmed

*Join the UIA during the training course and benefit from a 50% discount on your membership fee!*

# UIA Training Course

## Leadership, Management, Marketing and a Law Firm

Thursday, June 1 & Friday, June 2, 2017

LISBON – PORTUGAL

### REGISTRATION FORM

Register online at [www.uianet.org](http://www.uianet.org)  
or please complete and return this form by email, fax or post, to:



Register online!

#### UNION INTERNATIONALE DES AVOCATS

25 rue du Jour, 75001 Paris, FRANCE

Tel: +33 1 44 88 55 66 / Fax: +33 1 44 88 55 77 / Email: [uiacentre@uianet.org](mailto:uiacentre@uianet.org)

#### UIA INDIVIDUAL MEMBERS

Please specify your membership number (Please check your membership card or membership fees):

MI \_\_\_\_\_

Family Name: .....

First Name: .....

Firm: .....

Address: .....

Post Code: .....

City: .....

Country: .....

Tel: .....

Fax: .....

Email: .....

Date of Birth: .....

EU VAT ID-number: .....

Special requests (special diet, allergies, handicap...): .....

.....

#### A. TRAINING COURSE REGISTRATION FEES

	UIA Member		Non Member	
	<= 01.05.2017	> 02.05.2017	<= 01.05.2017	> 02.05.2017
<b>STANDARD REGISTRATION</b> <i>Amounts exclusive of VAT</i>	€ 490.00*	€ 540.00*	€ 540.00*	€ 590.00*
<b>YOUNG LAWYER (&lt;35)**</b> <i>Amounts exclusive of VAT</i>	€ 200.00*			

\* The VAT (23%) can be applied to the amount here above according to the European Directive 2006/112/CE of November 28, 2006. For more information, please contact the UIA. **If you provide an EU VAT ID number, the VAT will not be charged.**

\*\*Please attach proof of age to the registration form to benefit from young lawyers fee

## B. SOCIAL ACTIVITIES

Please indicate below whether you plan to attend the following events **included** in the registration fees:

- Welcome cocktail – Wednesday, May 31       Lunch – Thursday, June 1       Lunch – Friday, June 2

## C. OPTIONAL ACTIVITIES

Please indicate below whether you plan to attend the following events **not included** in the registration fees:

- Optional dinner – Friday, June 2:      **€ 55\* (Excl. VAT)** per person

## D. TOTAL

TOTAL (A) Excl. VAT – Registration Fees: ..... €  
TOTAL (B) Excl. VAT – Optional Activities: ..... €  
**TOTAL (A+B) Excl. VAT:** ..... €  
**VAT (23%)\*:** ..... €  
**TOTAL (A+B+VAT):** ..... €

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## E. COMMITMENT

I undertake to attend the entire two-day programme.

A "certificate of attendance" will be delivered to all participants who will attend the entire course.

## F. CANCELLATION & GENERAL CONDITIONS

I, the Undersigned, confirm that I have read and accepted the **cancellation conditions** as well as the **general conditions** given on page 6 of the registration programme. My registration will only be taken into account on receipt of the payment.

Participants are aware that their image and/or voice may be photographed, recorded or filmed throughout the duration of the training course. They hereby assign to the UIA, with the signature of this form, the right to exploit, reproduce and disseminate the images and recordings by all means, both known and unknown, using all media, for an unlimited term and free of charge.

## G. METHOD OF PAYMENT

♦ By cheque in € - drawn in a French bank - payable to the UIA, addressed to: UIA - 25 rue du Jour – 75001 Paris – France

♦ By Bank transfer in € - without charges to the payee – in favour of the Union Internationale des Avocats, quoting "F17LISBON", to the following bank and account:

**Société Générale – Paris Elysées Entreprise**  
**91, avenue des Champs Elysées – 75008 Paris - France**  
**BIC / SWIFT: SOGEFRPP**  
**IBAN: FR76 3000 3033 9200 0503 4165 164**

♦ By credit card:       Visa       Mastercard

Card N°: \_ \_ \_ \_ \_

Expiry date: \_ \_ / \_ \_      3 Digits: \_ \_ \_

Name of card holder: .....

I authorise the Union Internationale des Avocats to debit the above mentioned credit card in the amount of: **€ (Euros)**.....

Date: ...../...../.....

Signature: .....