

The Art of Effective Client Communication



CHAIR: **Jonathan Kulathungam**, *Teplitsky LLP*

November 7, 2023

9:00 a.m. to 12:00 p.m.

Total CPD Hours = 2 h 30 m Professionalism  + 30 m EDI Professionalism 

**Law Society of Ontario
Donald Lamont Learning Centre
130 Queen St. W.
Toronto, ON**

SKU CLE23-01103

Agenda

9:00 a.m. – 9:10 a.m.

Welcome

Jonathan Kulathungam, Teplitsky LLP

9:10 a.m. – 10:10 a.m.

The Difference Between Listening & Hearing Your Client's Story (10 m 🕒)

- Recognizing your client and initial intake process
 - Documentation
 - Managing client expectations
 - Preventing difficult situations
- Facilitating justice v. imposing your own perspective
- Unlocking helpful clues for mediation & settlement: Understanding positions v. interests
- Minding your own pre-occupations
- Considering culture

Moderator:

Jonathan Kulathungam, *Teplitsky LLP*

Panelists:

Catherine Allen, *Teplitsky LLP*

Justin Safayeni, *Stockwoods LLP*

10:10 a.m. – 10:20 a.m.

Question and Answer Session

10:20 a.m. – 10:35 a.m.

Break

10:35 a.m. – 11:25 a.m.

Useful & Innovative Practices: Sharing Ideas (10 m 🕒)

- Preparing helpful question templates
- Documenting discussions
- Avoiding client's adoption of your position (ie. Discoveries)
- (Visiting key places germane to the case to spark memories if appropriate)
- Cultural considerations
- Discovery process and mediation – how to deal with client interests and expectations
- How to avoid complaints and claims
- Impact of costs
- Rule 49 offer

Moderator:

Jonathan Kulathungam, *Teplitzky LLP*

Panelists:

Sean Zeitz, C.S., *Lipman, Zener & Waxman*

David Milosevic, *Milosevic & Associates*

Neil Wilson, *Stevenson Whelton LLP*

11:25 a.m. – 11:55 a.m.

Law Society Complaints & LawPro Claims & The Importance of EDI (10 m 🕒)

- Protecting yourself and your client and prepping your staff
- Keeping records of conversations
- Cultural considerations

Moderator:

Jonathan Kulathungam, *Teplitzky LLP*

Panelists:

Victoria Crewe-Nelson, Vice President, Underwriting & Customer Service and Secretary, *Lawyers' Professional Indemnity Company (LAWPRO®)*

Shawn Erker, Legal Writer and Content Manager
Lawyers' Professional Indemnity Company (LAWPRO®)

Jennifer Gold, *Wood Gold LLP*

11:55 a.m. – 12:00 p.m.

Question and Answer Session

12:00 p.m.

Program Ends