



Southwest Legal Services

Business Plan

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ABSTRACT

Southwest Legal Services is a paralegal services firm based in Wallaceburg, Ontario. Its mission is to provide affordable, professional advice on a variety of human resource, management, and legislative issues to individuals and small businesses in the Chatham-Kent and Lambton County areas.

Potential markets include the individual (consumer) market as well as industrial markets consisting of both law firms and small businesses. Services offered will include legal representation within the scope of the Law Society of Upper Canada's Paralegal Practice Guidelines. Southwest Legal Services will also represent clients in Small Claims Court and various tribunals, notarize documents, prepare documents, write letters, conduct investigations, and perform strategic management planning.

Principal competitors of Southwest Legal Services are primarily independent practitioners or small professional corporations with one or two employees. Most practitioners possess a paralegal diploma from a community college. Very few have retail space, so their practice is limited in scope to that deliverable from a home office.

Southwest Legal Services will employ a combined market entry strategy of cost leadership and service differentiation to provide a competitive advantage. The venture will differentiate itself from its competitors by offering a cost-effective alternative to retaining a lawyer for basic legal services, and by providing value-added products such as free e-books and do-it-yourself guides. The market where Southwest Legal Services will operate is highly fragmented, with low barriers to entry. For this reason, Southwest Legal Services will execute a pull-based marketing strategy, with a keen focus on networking opportunities and on demonstrating the value that this venture can bring to its potential clients.

A website and inexpensive online advertising campaigns will soon be launched for the venture. Social media accounts have been established, with an emphasis on LinkedIn and a blog.

Southwest Legal Services is currently a sole proprietorship and all major business functions are being handled by the founder. Plans have been established to utilize freelance independent contractors and inexpensive students help to mitigate the risk posed by potentially sporadic work. Incorporation will be investigated in the future.

Financial projections are conservative for 2012; the company is estimated not to quite break even in the first year of operation. The venture has the potential for annual sales in

excess of \$100,000 (CAD), based on comparisons with ventures of similar type in the area. The financial risk will be mitigated by the owner retaining full time outside employment or leasing retail space until the venture begins to generate sufficient revenue.

Competitive analysis and pro forma financial statements completed for this report confirm that Southwest Legal Services is a viable small business opportunity with goals that are attainable within the first year of operation.

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INTRODUCTION

Southwest Legal Services is a paralegal services firm based in Wallaceburg, Ontario. The firm will seek to use a combined market entry strategy of cost leadership and service differentiation to provide a competitive advantage.

The decision to starting as a part-time, home-based, sole proprietorship will limit initial start-up costs and mitigate the financial risk of the owner quitting a full-time job.

Potential markets include the individual (consumer) market as well as industrial markets – both law firms and small businesses. Financial projections are conservative for 2012, the first year of operation, but the venture has the potential for annual sales in excess of \$100,000 (CAD) based on comparisons with ventures of similar type in the area.

The use of technology-based marketing, referrals, and a variety of marketing tools were initially thought to generate a steady stream of clients for the venture. However, a venture screening and feasibility study completed in early 2011 indicates that the number of paralegals in the Chatham-Kent and Lambton Counties areas has doubled, giving potential clients a much larger choice of service providers. The low barriers to entry and numerous retail competitors will compel Southwest Legal Services to tightly define its target markets and explore options for service and product offerings that will differentiate it from the competition.

PARALEGAL

The paralegal profession in Ontario is regulated by the Law Society of Upper Canada (LSUC). Consequently, numerous publications list the regulations pertaining to paralegal practice that must be observed when contemplating a business of this sort. Foremost of these is *The Guide to Opening Your Paralegal Practice* (2010), which is a comprehensive document aimed at helping the reader complete a business plan for establishing a legal services practice. The guide contains an extensive resource list, financial templates, and a basic business plan framework. It provides the reader with practical checklists pertaining to every area of a legal services practice, including office location, computer system requirements, and office setup.

In addition to issues that all businesses must consider, a paralegal business must contend with numerous additional legal requirements. Among these are malpractice insurance, trust accounts, naming guidelines, permissible business structures, registration with LSUC, rules of professional conduct, and LSUC reporting requirements.

While these guidelines are useful and must be observed, they are not intended to be creative or strategic or to provide specific guidance for marketing a paralegal firm.

BUSINESS PLAN

VISION

Southwest Legal Services strives to provide affordable, professional advice on a variety of human resource, management, and legislative issues to individuals and small businesses in the Chatham-Kent and Lambton County areas.

MISSION

Southwest Legal Services makes it easier than ever to access affordable, professional advice on a variety of human resource, management, and legislative issues. Wrongful dismissals, harassment investigations, landlord-tenant disputes, and small claims court issues can often be handled out of court, at a fraction of the cost of hiring a lawyer.

At Southwest Legal Services, we believe in advocacy and doing everything in our power to help our clients. That's why we offer free consultations, free quotes, and up-front pricing. We don't ask for hefty retainers and we will never bill you outrageous fees for phone conversations or photocopies.

We employ a team of Paralegals and Management Professionals who are committed to ethical business practices. If ever an issue is outside our areas of expertise, we will be happy to recommend a trusted professional colleague to assist you.

FACT SHEET

Company name: SOUTHWEST LEGAL SERVICES

Ontario Master Business Licence Number: _____

CRA Business Number: _____

Location: 45 Mount Pleasant Crescent, Wallaceburg Ontario N8A 4X2

Phone: 519-627-4791

Type of business and industry: Paralegal

Form of business organization: Sole proprietorship

Principal product or service line: Paralegal Services

Registered patents or trademarks (if any): none

Names of founders/partners/shareholders: Chuck Taylor

Length of time in business (if appropriate): Established _____

NAMES OF BUSINESS ADVISORS

Lawyer:

Accountant:

Financial Advisor:

ENTERPRISE & THE INDUSTRY

Southwest Legal Services was registered as a sole proprietorship in Ontario Canada on _____. The enterprise is currently located at 45 Mount Pleasant Crescent, Wallaceburg, Ontario N8A 4X2.

The initial focus of the business was on providing affordable, accessible management advice and legal counsel to individuals, as they typically do not have the resources available to corporations. However, it soon became apparent that many small businesses are in a position where they cannot justify a full-time lawyer or paralegal, yet they need a professional to help guide them through numerous legislative challenges.

To date, Southwest Legal Services has undertaken a significant amount of pro bono work for friends and acquaintances who have found themselves in tough situations. For example: drafting unemployment appeals, providing career counselling and resume preparation, preparing witnesses for trial, and speaking publicly as a human rights advocate. Targeted marketing campaigns and some basic advertising have started to pique the interest of paying clients.

Examination of competitors has revealed that very few have a web presence and even fewer have a retail location welcoming to walk-in traffic. The intention, therefore, is to transition Southwest Legal Services from a home-based sole proprietorship to a retail corporation by the end of 2013. Once the business is established, a retail location will be sought to maximize exposure and allow for walk-in customer traffic. The retail office location will be determined closer to the time of launch and will be in close proximity to

public transit and downtown business activities. The potential then exists to open additional locations and/or to franchise the business model.

It is difficult to ascertain the exact size of the industry, due mostly to the overlap with private law firms that are under no obligation to publicly disclose their revenue levels. Examination solely of paralegals in the Chatham-Kent and Lambton County areas indicates the presence of only a handful of small firms, and numerous independent practitioners working from home offices. Public disclosure by these firms on manta.com reveals annual revenues of approximately \$100,000 per employee in the firm. Underemployment rates for lawyers in this area are high, which increases the likelihood that competition will intensify in the future.

PRODUCT/SERVICE OFFERING

Southwest Legal Services will provide basic legal services that fall under the North American Industry Classification System (NAICS) category 541199 – “All Other Legal Services.” This includes representation in courts such as Small Claims Court, the Ontario Court of Justice and various tribunals; document processes such as writing, serving and notarizing; and dispensing legal advice. Southwest Legal Services will strive to provide excellent customer service, and will use every means practicable to satisfy its clients. Additionally, the business will be covered by errors and omissions insurance, so as to minimize damage to both customers and Southwest Legal Services in the event of any errors.

Product/Service

Legal services

- Notarizing documents
 - Wills, deeds, trust documents
 - Affidavits
 - Travel documentation
 - Contracts
- Filing documents
- Serving documents
- Preparing documents and writing letters
- Representing clients
 - Small Claims Court representation
 - Ontario Court of Justice representation
(*Provincial Offenses Act*)

Primary Target Markets

Individuals
(consumer market)

- *Criminal Code* (Canada) representation
- *Insurance Act* claims
- *Workplace Safety and Insurance Act* representation
- *Employment Standards Act* complaints
- Unemployment appeals
- Benefit appeals

Legal services

- Drafting correspondence
- Preparing courtroom filings, pleadings, case presentation, and demand letters
- Handling overflow work, proofreading, editing, and fielding calls
- Reviewing and organizing client files from inception to settlement/trial

Law firms

(industrial market)

Paralegal consulting

- Documenting employee discipline and terminations
- Defending wrongful dismissal challenges
- Defending constructive dismissals
- Preparing and enforcing employment contracts
- Preparing employee handbooks and policies, and assisting with employee issues
- Human rights, harassment, and integrity investigations
- Strategic planning, employee engagement, recruitment, retention, and staff planning

Other companies
(industrial market)

MARKET ANALYSIS

The launch of Southwest Legal Services has utilized a combined market entry strategy of cost leadership and service differentiation. The intent is to ensure that prices remain slightly less than competitors' prices and that the service level and web presence far exceed those of competitors. This will allow Southwest Legal Services to gain market share, as the business becomes better known.

Southwest Legal Services will target the consumer and industrial markets in the Chatham-Kent and Lambton County areas of Ontario, Canada.

Wallaceburg is a small community of approximately 11,000 residents. It is located in the Ontario county of Kent (population 110,000). The town of Wallaceburg is bisected by the Sydenham River and adjoins the county of Lambton.

Three distinct customer segments will be serviced – individuals, businesses, and law firms.

- Individuals seeking information regarding their rights and seeking representation will feel comfortable working with an affordable professional who will advocate for their rights.
- Organizations accustomed to paying exorbitant amounts for phone consultations with law firms will be pleasantly surprised when their inquiry is given prompt and courteous attention at a reasonable cost.
- Law firms that are too busy to provide quick customer response time and personalized service will appreciate the short turnaround times of documentation and file serving.

The target demographic of individual clients will be cost-conscious adults with low to average education levels, ranging in age from 25 to 55 years old, who are part of the lower middle to upper classes of society.

Southwest Legal Services' customer service-oriented approach appeals to the cost-conscious consumer who feels intimidated by the law. The creation of a warm friendly atmosphere, with up-front pricing and convenient evening and weekend hours, will provide clients with timely, affordable, and non-intimidating access to the legal resources they require.

Targeted industrial clients are small businesses that lack the resources to employ a full-time legal professional. As start-ups continue to grow in number, the need for such consultative services is also expected to increase (See Appendix 1). The use of Scott's Directory or Manta may help in generating a library database for finding small companies to target.

Law firms will likely be the most challenging market segment to service, as they have all the capabilities that Southwest Legal Services offers in-house already. The key to success in this market will be the ability to demonstrate the benefits (including cost savings, turnaround time, and quality writing skills) that these firms will gain by outsourcing their clerical legal tasks.

SWOT ANALYSIS

A SWOT analysis provides valuable information required to match Southwest Legal Services' resources and capabilities to its competitive environment.

Strengths

The owner's educational background and experience is Southwest Legal Services' greatest strength and provides it with an advantage over other businesses. Additionally, cost advantages over competitors and favourable access to a large network of potential clients bode well for the venture.

Weaknesses

The inability of the owner to commit to working for Southwest Legal Services on a full-time basis is a considerable weakness at this point. Unfortunately, due to financial restrictions, the owner cannot quit their full-time job at the present time. The Southwest Legal Services brand name is not currently well known, the venture currently has no retail location, and access to supplementary funding is not available in the near future.

Opportunities

The market is currently very fragmented; it consists of numerous independent service providers each possessing only a small portion of the overall market share. Therefore, the opportunity exists for Southwest Legal Services to establish itself as a market leader and expert in the legal services field.

Threats

The low barriers to entry into this market increase the potential for competition in the future. The establishment of competitors with walk-in friendly retail space is also a significant threat.

COMPETITION

Principal competitors of Southwest Legal Services are primarily independent practitioners or small professional corporations with one or two employees. Most practitioners possess a paralegal diploma from a community college. Very few have retail space, so their practice is limited in scope to that deliverable from a home office.

While Southwest Legal Services' service offering is not significantly dissimilar to that of its competitors, the manner in which service and advertising are delivered will differentiate the organization and allow Southwest Legal Services to gain market share.

According to the LSUC Paralegal Directory, nine licensed paralegals currently operate in the Chatham-Kent and Lambton County areas (See Appendix 2).

Since legislation changes to paralegal licensing the number of paralegals have increased significantly. Retail paralegal competitors can be grouped into three broad categories: those specializing in traffic ticket violations, those specializing in Workplace Safety and Insurance Board (WSIB) cases, and those offering a broad range of paralegal services. A brief overview of each of the retail firms in the Chatham-Kent area follows. Estimated annual sales figures were obtained from manta.com.

MARKETING PLAN

Based on the firms where estimated annual sales data were available, the estimated annual sales per employee would appear to be \$105,732.92. Assuming that the market is not currently flooded and that the retail firms present in the Chatham-Kent and Lambton County areas are all profitable, crude estimates place the total market size around \$1 million, which does not include the handful of home-based sole proprietors not examined in this report.

Southwest Legal Services' pricing will be available on the website, in order to avoid any surprises to the customer, and payment will be due at the time service is rendered. Credit may be granted to established organizations that demonstrate a consistent payment history and develop an ongoing relationship with Southwest Legal Services. Pricing strategy will use a combination of value-based and competition-based pricing (Good, 2008); however, competitors' price data is not readily available or easily obtained. Suggested retail prices are detailed below, as are conservative sales estimates based on charging \$50 per hour. As overhead and labour costs are minimized while working from a home-based office, the profit margin is 80-90%.

Preliminary Sales Estimates by Service Category

Primary Target Markets	Product/Service	Sales Goal per Product	Worst Case	Most Likely Case	Best Case	Suggested Retail Price
Individuals (consumer market) Legal services	Notarizing documents	10 per month	0	\$50	\$150	\$15 per signature
	Filing documents	50 per month	0	\$125	\$500	\$10 per document
	Serving documents	5 per month	0	\$125	\$250	\$50 flat rate
	Small Claims Court representation	10 hours per month	0	\$250	\$500	\$50 per hour
	Ontario Court of Justice representation (Provincial Offenses Act)	5 hours per month	0	\$100	\$250	\$50 per hour
	Criminal Code (Canada) representation	10 hours per month	0	\$0	\$500	\$50 per hour
	Insurance Act claims	10 hours per month	0	\$0	\$500	\$50 per hour
	Workplace Safety and Insurance Act representation	10 hours per month	0	\$0	\$500	\$50 per hour
	Employment Standards Act complaints	5 per month	0	\$100	\$250	\$50 and up
	Unemployment appeals	5 per month	0	\$100	\$250	\$50 and up
	Benefit appeals	5 per month	0	\$100	\$250	\$50 and up
	Document/letter writing	20 per month	0	\$250	\$1,000	\$50 and up
Law firms (industrial market)	Draft correspondence, courtroom filings, pleadings, case preparation, and demand letters	10 hours per month	0	\$100	\$500	\$50 per hour
Legal services	Overflow work, proofreading and editing, and fielding calls	10 hours per month	0	\$100	\$500	\$50 per hour
	Review and organize client files from inception to settlement/trial	10 hours per month	0	\$100	\$500	\$50 per hour
Other companies (industrial market) Legal consulting	Employee discipline and terminations	10 hours per month	0	\$100	\$500	\$50 per hour
	Wrongful dismissals	10 hours per month	0	\$100	\$500	\$50 per hour
	Constructive dismissals	10 hours per month	0	\$100	\$500	\$50 per hour
	Employment contracts	10 hours per month	0	\$100	\$500	\$50 per hour
Total Monthly Income:			0	\$1,900	\$8,400	
Total Annual Income:			0	\$22,800	\$100,800	

ADVERTISING AND PROMOTION PROGRAMS

A *pull* strategy will be used to draw customers to Southwest Legal Services' services, by ensuring that an advertising campaign is targeted to the correct audience rather than advertising to the masses. Specifically identifying the industry sector most in need of Southwest Legal Services' services, and demonstrating the value that Southwest Legal Services can provide, will be crucial to target the desired market.

Southwest Legal Services will target floundering or inexperienced middle managers, rather than business owners, and thereby stand a better chance of getting a foot in the door of small businesses. Southwest Legal Services will utilize statistics to determine turnover costs or litigation costs that an employer might face by making the wrong hire or not handling a discipline situation properly and will be able to demonstrate the return on investment and potential cost savings that can be enjoyed by a small business using its services. Determining the specific market segment (i.e., tool and die or manufacturing companies in the Wallaceburg area) will further focus Southwest Legal Services' marketing efforts and ensure that advertising is directed at the pertinent industrial sector.

Potential clients who are offered something free and who sign up to receive it, are prequalified as being interested in the services of Southwest Legal Services. They become, in effect, a captive audience for the enterprise's message.

Online communities are transient, with "followers" coming and going frequently. By connecting with serious potential clients and providing them with something they value, Southwest Legal Services will seek to remain connected with decision-makers.

Southwest Legal Services will also establish its expertise in the field of HR and employment legislation and provide valuable information to potential clients. In this way, it will organically draw followers and build a solid reputation in the community.

The primary promotional message to potential customers is that the name Southwest Legal Services is synonymous with quality legal services at a reasonable price. As such, it is extremely important to create a strong brand presence by inundating the target market with as much publicity as possible, using the most cost-effective methods of advertising. This will be especially critical while the firm is still in its infancy. The initial advertising budget will be relatively conservative, prioritizing a website and *freemium* products.

Website Setup

Many of the existing paralegal firms in the Chatham-Kent and Lambton County areas do not appear at all in Internet search results or they have websites that are difficult to find. The goal for Southwest Legal Services is to create a comprehensive, easy to navigate website that provides valuable information for potential clients and is easy to find. However, because barriers to entering this market are low, web advertising alone cannot be relied upon as a differentiation advantage.

Preliminary Website Analysis

Preliminary Google AdWords keyword tool analysis has revealed that search hits are greatest for legal assistance, legal help, and legal aid; therefore, these phrases will be included in the site as keywords. Site title, description, and keywords will be established using wix.com search engine optimization guidelines, and the site will be submitted to Google, Yahoo, and Bing search engines. In order to increase Southwest Legal Services' Google page rank, professional SEO assistance may be sought in the future.

Google Analytics will be used to analyze traffic to the site, the number of visitors, page views, where in the world the site is viewed, how long visitors stay, and keywords used to find the site.

Online Directory Listings

Listings have been placed in the following free online directories:

- manta.com
- 411.ca
- getfreelisting.com
- freebizads.ca
- hotfrog.ca
- yellowpages.ca

Additional locations for free or inexpensive online advertising will continue to be explored.

Social Media

A twitter account will be established for Southwest Legal Services to ensure the availability of the name should the desire to use twitter arise in the future. The account is currently dormant as other preferred forms of social media are being explored.

A link to Southwest Legal Services' site will be posted on the owner's personal Facebook page; however, the profile is limited to friends only and does not appear in search results. A separate *company* page has not yet been established for Southwest Legal Services, but may be in the future. Facebook advertising will also be explored.

LinkedIn is the social media of choice for Southwest Legal Services' owner. With a vast personal network, traffic to the enterprise's LinkedIn page is expected to be consistent.

e-Books

An abundance of self-help type products is available on the market, most notably, books from Self Counsel Press. However, no short, easy to read free guides or e-books are currently available. E-books may be developed in the future to provide do-it-yourself guides for the general public or to supplement the services offered by Southwest Legal Services.

Potential e-book subjects for managers include:

- The do's and don'ts of conducting internal investigations
- What to do in the event you are served with a claim
- Benefits of obtaining outside assistance with legal issues

Potential e-book subjects for individuals include:

- How to write a compelling appeal letter
- How to file in Small Claims Court
- A how-to guide for incorporating a business

Networking and Referrals

As Southwest Legal Services' owner is not particularly skilled in sales, steps must be taken to ensure that potential business opportunities are not missed.

- Developing an elevator pitch is a necessity. It must speak to the benefits that Southwest Legal Services can provide to potential clients and help them meet their business needs in a cost-effective manner.
- Rehearsing the elevator pitch will allow the owner to gain confidence in delivering Southwest Legal Services' message.
- Registering with local Business Improvement Associations or Chambers of Commerce may provide both networking and volunteering opportunities.

- Attending networking events on a twice-monthly basis will ensure that the owner stays sharp and continues to practice relationship building with the community.

Referrals from current and previous customers will be an invaluable form of marketing. Doing some pro bono work for friends or volunteer speaking engagements may help develop an initial client base, and provide requisite testimonials to help draw additional clientele.

Public Relations

PR Web and HARO (Help a Reporter Out) will be utilized to augment Southwest Legal Services' position as an expert in the field. By offering expert opinions or meaningful contributions to the community and by participating in local trade shows, specialty conferences, volunteer activities, and community events, Southwest Legal Services can further promote its services and grow its brand.

Traditional Marketing

Customized stationery, folders, business cards, advertising postcards, magnets, pens, and notepads are being utilized to consistently convey a standard brand image to the public. Printed brochures or information sheets targeted towards each market segment will be developed, detailing the benefits of utilizing Southwest Legal Services' services.

Additional advertising utilizing local radio ads, billboards, outdoor bench ads, or ads in consumer business magazines may be undertaken once the business is established and is able to allocate more funds towards promotion. However, because consumers are inundated with thousands of media messages each day, and traditional advertising vehicles reach fewer people than in years past, caution will be taken before allocating funds towards costly forms of advertising.

OPERATIONS PLAN

Location

Southwest Legal Services currently operates from a 250 square foot home office in Wallaceburg Ontario. While overhead is low, accessibility to customers is limited to specific appointment times, as the founder's home is not open to walk-in traffic. Parking is

ample and the cost is reasonable; however, zoning is residential so servicing high volumes of clients is not feasible at this time, and the office is not accessible to wheelchairs.

In addition to errors and omissions insurance that must be carried by licensed paralegals, extra home insurance is required to cover liabilities associated with visiting clients.

Alternatively, a virtual office concept may be employed in conjunction with a home office. This would allow Southwest Legal Services to remain nebulous and to conduct client meetings on-site at the client's location. Cost savings gained from not having to pay rent for a retail space could then be passed along to the client.

Retail space would allow better access to clients and walk-in traffic and would allow customers to come to Southwest Legal Services on their own, helping to offset the owner's dislike of sales. However, having a dedicated office space is restricting, as someone always needs to be in the office during opening hours. This would mean employing a receptionist so that the owner could attend client meetings at the client's location.

Shared workspace arrangements are available at a greatly reduced cost in the city of Chatham at The Ground Floor.

The Ground Floor - 67 King Street West, Chatham, ON

<http://www.groundfloorck.com/>

Currently accepting new members for phase one of the project, The Ground Floor is creating a shared workspace for independent workers and small organizations. There are three types of tenancy – private office space, permanent desk space, and hot desks. In addition to these individual workspaces, tenants have access to a variety of communal areas and shared services.

Southwest Legal Services will preferably lease its own retail space, so that client files, office supplies, and resource materials can be secured on-site and the space can be signed and advertised accordingly. The ideal location would have washroom facilities, a small kitchenette, and a reception area, as well as two or three offices. The potential exists to sublet office space to other firms or individuals to supplement Southwest Legal Services' income.

While the court buildings are located in downtown Chatham, rent and competition are steep, and access is limited due to lack of available parking. The preferred location for a retail office would be in a high traffic area in Wallaceburg, which is both close to the owner's home, and within reasonable driving distance (20 minutes maximum) to the court buildings.

Employee Requirements

As Southwest Legal Services is in its infancy, hiring additional employees is not feasible at the current time. However, independent contractors will be utilized to augment the capabilities of the founder on a project or term basis as this eliminates the need to remit EI, CPP, WSIB premiums, Employer Health Tax, and benefits.

The owner has discussed contracting arrangements with a few seasoned lawyers and management professionals, who are available on a freelance or telecommuting basis, to augment Southwest Legal Services' workforce as needed.

Inexpensive contractors from a variety of overseas outsourcing firms may be utilized to assist with business writing, promotions, and product development.

Co-op students (at no cost) from St. Clair College will be utilized to provide administrative support in the office, and unpaid internships may be offered to recent paralegal graduates from a variety of local colleges and training schools.

Management Profile

Southwest Legal Services is currently a sole proprietorship and all major business functions are being handled by the founder.

Relevant Experience

- Worked directly with a variety of corporate legal departments preparing legal defence documentation for claims; represented companies in examinations for discovery, mediations, settlement conferences, and legal proceedings.
- Conducted impartial investigations regarding harassment and discrimination complaints, integrity violations, Ministry of Labour inquiries, and labour/unionization activity.
- Oversaw the administration of workplace accident (WSIB) claims, participated in mediations to facilitate the Early Safe Return to Work (ESRTW) process, and mentored other managers on protocols for managing claims.
- Represented clients in Small Claims Court.
- Experienced in dealing with the Ontario Employment Standards Act (ESA), Occupational Health and Safety Act (OHSA), Workplace Safety and Insurance Act (WSIA), Canadian Human Rights Code, Canadian Labour Code, as well as contract and tort law.

IMPLEMENTATION SCHEDULE

Immediate and ongoing

- Monitor online ad campaigns
- Attend two networking events monthly
- Review business plan and implementation schedule monthly
- Contact past clients for references and referrals

Future

- Submit notary public application to the Ministry of the Attorney General
http://www.attorneygeneral.jus.gov.on.ca/english/courts/notary_public/default.asp
- Determine whether blog/article writing should be outsourced or done by the owner
- Create/outsourcing 10-20 blog posts/articles
- Create/outsourcing a free e-book targeted at middle managers of small businesses that will discuss the benefits of obtaining outside assistance with legal issues.
- Establish a trust account as per LSUC paralegal guidelines
- Research incorporation

FINANCIAL PLAN

Southwest Legal Services' owner has funded the start-up activities of the business thus far and will be claiming them as expenses against their personal income for 2012, as the enterprise is currently a sole proprietorship.

2012 Financials

Anticipated expenditures for 2012 include the following:

- LSUC membership dues
- Paralegal Licensing Examination
- Application Fee for the Licensee Certificate for Legal Services
- Errors and Omissions Insurance

Detailed financial projections based on continuing operations from a home office have been provided in the following schedules. Because Southwest Legal Services has not made any sales to date, during the first few months of operation Southwest Legal Services is operating at a loss. As advertising increases and the owner has more time to dedicate to networking and sales, gross margin is expected to increase steadily for the remainder of the year, peaking at the *most likely case* scenario for a total monthly income of \$1900 per month in December 2012. Despite the increase in gross revenue, Southwest Legal Services would finish the year with a net operating loss of \$62 (see Schedule 1).

Fixed home office expenses are \$470 per month. While shared office space may be rented for less than this, it seems unlikely that Southwest Legal Services will be able to afford its own retail space without significantly greater revenue levels.

Lease rates for commercial space in Wallaceburg range from \$11 to \$21 per square foot, plus tax, plus common area maintenance (COM) fees. Using a conservative average of \$16 per square foot, plus tax and COM fees of \$4 per square foot, a 250 square foot retail space would lease for \$5,000 per year or \$416 per month. This, in addition to utilities, phone, and the requisite receptionist for a retail space would require Southwest Legal Services to have gross sales approaching \$3000 per month in order to break even (see Schedule 2). As such, it is unlikely that Southwest Legal Services will be able to afford a retail location within the first year of operations unless outside financial assistance is obtained.

Note that neither of these two scenarios factors in a salary or wage for the owner in the first year of operation.

Based on the pro forma cash flow statement (Schedule 3), it would be advisable to have a positive cash position in the form of a loan or cash infusion from the owner. Finances are currently limited, it has proven more feasible to pay for expenses as they arise using the owner's employment income as a funding source. During 2012, the owner contributed start-up funds from their employment income to Southwest Legal Services' start-up expenses.

Schedule 4 details a pro forma balance sheet for Southwest Legal Services; however, due to the lack of tangible assets or inventory the business possesses, retained earnings would be equivalent to sales for the first year of operation. The breakeven point, or the point at which projected revenues are equivalent to projected expenses for the business (see Schedule 5) at the end of 2012, would be \$10,736.00.

SCHEDULE 1													Pro Forma Income Statement for the Year Ending December 31, 2012												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL												
1. Gross Sales	0	0	0	200	400	600	1,000	1,500	1,800	1,900	1,900	1,900	11,200												
2. Less: Cash Discounts	0	0	0	0	0	0	0	0	0	0	0	0	0												
A. NET SALES	\$0	\$0	\$0	\$200	\$400	\$600	\$1,000	\$1,500	\$1,800	\$1,900	\$1,900	\$1,900	\$11,200												
Cost of Goods Sold:																									
3. Beginning Inventory	0	0	0	0	0	0	0	0	0	0	0	0	0												
4. Plus: Net Purchases	0	0	0	0	0	0	0	0	0	0	0	0	0												
5. Total Available for Sale	0	0	0	0	0	0	0	0	0	0	0	0	0												
6. Less: Ending Inventory	0	0	0	0	0	0	0	0	0	0	0	0	0												
B. COST OF GOODS SOLD	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0												
C. GROSS MARGIN	\$0	\$0	\$0	\$200	\$400	\$600	\$1,000	\$1,500	\$1,800	\$1,900	\$1,900	\$1,900	\$11,200												
Less: Variable Expenses																									
7. Owner's Salary	0	0	0	0	0	0	0	0	0	0	0	0	0												
8. Employee's Wages and Salaries	0	0	0	0	0	0	0	0	0	0	0	0	0												
9. Supplies and Postage	0	0	0	30	30	30	30	30	30	30	30	30	270												
10. Advertising and Promotion	0	0	200	100	100	100	100	100	100	100	100	100	1,100												
11. Delivery Expense	0	0	0	0	0	0	0	0	0	0	0	0	0												
12. Bad Debt Expense	0	0	0	0	0	0	0	0	0	0	0	0	0												
13. Travel	0	0	0	0	0	0	0	0	0	0	0	0	0												
14. Legal and Accounting Fees (professional dues)	0	0	0	110	450	0	1,215	602	0	0	0	0	2,377												
15. Vehicle Expense	0	0	0	100	100	100	100	100	100	100	100	100	900												
16. Maintenance Expense	0	0	0	0	0	0	0	0	0	0	0	0	0												
17. Miscellaneous Expenses	50	50	50	50	50	50	50	50	50	50	50	50	600												
D. TOTAL VARIABLE EXPENSES	\$50	\$50	\$250	\$390	\$730	\$280	\$1,495	\$882	\$280	\$280	\$280	\$280	\$5,247												
Less: Fixed Expenses																									
18. Rent (10% of home mortgage)	200	200	200	200	200	200	200	200	200	200	200	200	2,400												
19. Utilities (Heat, Light, Power)	30	30	30	30	30	30	30	30	30	30	30	30	360												
20. Telephone	125	125	125	125	125	125	125	125	125	125	125	125	1,500												
21. Taxes and Licenses	0	0	0	0	0	0	0	0	0	0	0	0	0												
22. Depreciation	0	0	0	0	0	0	0	0	0	0	0	0	0												
23. Interest	0	0	0	0	0	0	0	0	0	0	0	0	0												
24. Insurance (errors and omissions)	0	0	0	0	0	0	0	75	75	75	75	75	375												
25. Other Fixed Expenses (includes property tax, mortgage interest, house insurance & internet)	115	115	115	115	115	115	115	115	115	115	115	115	1,380												
E. TOTAL FIXED EXPENSES	\$470	\$470	\$470	\$470	\$470	\$470	\$470	\$545	\$545	\$545	\$545	\$545	\$6,015												
F. TOTAL OPERATING EXPENSES	\$520	\$520	\$720	\$860	\$1,200	\$750	\$1,965	\$1,427	\$825	\$825	\$825	\$825	\$11,262												
G. NET OPERATING PROFIT (LOSS)	(\$520)	(\$520)	(\$720)	(\$660)	(\$800)	(\$150)	(\$965)	\$73	\$975	\$1,075	\$1,075	\$1,075	(\$62)												
H. INCOME TAXES (estimated)	\$0	\$0	\$0	\$44	\$88	\$132	\$220	\$330	\$396	\$418	\$418	\$418	\$0												
I. NET PROFIT (LOSS) AFTER INCOME TAX	(\$520)	(\$520)	(\$720)	(\$704)	(\$888)	(\$282)	#####	(\$257)	\$579	\$657	\$657	\$657	(\$62)												

SCHEDULE 2 - Retail Location		Pro Forma Income Statement for the Year Ending December 31, 2012												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL	
1. Gross Sales	0	0	0	0	3,400	3,400	3,400	3,400	3,400	3,400	3,400	3,431	27,231	
2. Less: Cash Discounts	0	0	0	0	0	0	0	0	0	0	0	0	0	
A. NET SALES	\$0	\$0	\$0	\$0	\$3,400	\$3,400	\$3,400	\$3,400	\$3,400	\$3,400	\$3,400	\$3,431	\$27,231	
Cost of Goods Sold:														
3. Beginning Inventory	0	0	0	0	0	0	0	0	0	0	0	0	0	
4. Plus: Net Purchases	0	0	0	0	0	0	0	0	0	0	0	0	0	
5. Total Available for Sale	0	0	0	0	0	0	0	0	0	0	0	0	0	
6. Less: Ending Inventory	0	0	0	0	0	0	0	0	0	0	0	0	0	
B. COST OF GOODS SOLD	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
C. GROSS MARGIN	\$0	\$0	\$0	\$0	\$3,400	\$3,400	\$3,400	\$3,400	\$3,400	\$3,400	\$3,400	\$3,431	\$27,231	
Less: Variable Expenses														
7. Owner's Salary	0	0	0	0	0	0	0	0	0	0	0	0	0	
8. Employee's Wages and Salaries	0	0	0	1,600	1,600	1,600	1,600	1,600	1,600	1,600	1,600	1,600	14,400	
9. Supplies and Postage	0	0	0	30	30	30	30	30	30	30	30	30	270	
10. Advertising and Promotion	0	0	200	100	100	100	100	100	100	100	100	100	1,100	
11. Delivery Expense	0	0	0	0	0	0	0	0	0	0	0	0	0	
12. Bad Debt Expense	0	0	0	0	0	0	0	0	0	0	0	0	0	
13. Travel	0	0	0	0	0	0	0	0	0	0	0	0	0	
14. Legal and Accounting Fees (professional dues)	0	0	0	110	450	0	1,215	602	0	0	0	0	2,377	
15. Vehicle Expense	100	100	100	100	100	100	100	100	100	100	100	100	1,200	
16. Maintenance Expense	0	0	0	0	0	0	0	0	0	0	0	0	0	
17. Miscellaneous Expenses	50	50	50	50	50	50	50	50	50	50	50	50	600	
D. TOTAL VARIABLE EXPENSES	\$150	\$150	\$350	\$1,990	\$2,330	\$1,880	\$3,095	\$2,482	\$1,880	\$1,880	\$1,880	\$1,880	\$19,947	
Less: Fixed Expenses														
18. Rent (10% of home mortgage)	200	200	200	416	416	416	416	416	416	416	416	416	4,344	
19. Utilities (Heat, Light, Power)	30	30	30	30	30	30	30	30	30	30	30	30	360	
20. Telephone	125	125	125	125	125	125	125	125	125	125	125	125	1,500	
21. Taxes and Licenses	0	0	0	0	0	0	0	0	0	0	0	0	0	
22. Depreciation	0	0	0	0	0	0	0	0	0	0	0	0	0	
23. Interest	0	0	0	0	0	0	0	0	0	0	0	0	0	
24. Insurance (errors and omissions)	0	0	0	0	0	0	0	75	75	75	75	75	375	
25. Other Fixed Expenses (internet)	115	115	115	40	40	40	40	40	40	40	40	40	705	
E. TOTAL FIXED EXPENSES	\$470	\$470	\$470	\$611	\$611	\$611	\$611	\$686	\$686	\$686	\$686	\$686	\$7,284	
F. TOTAL OPERATING EXPENSES	\$620	\$620	\$820	\$2,601	\$2,941	\$2,491	\$3,706	\$3,168	\$2,566	\$2,566	\$2,566	\$2,566	\$27,231	
G. NET OPERATING PROFIT (LOSS)	(\$620)	(\$620)	(\$820)	(\$2,601)	\$459	\$909	(\$306)	\$232	\$834	\$834	\$834	\$865	\$0	
H. INCOME TAXES (estimated)	\$0	\$0	\$0	\$0	\$748	\$748	\$748	\$748	\$748	\$748	\$748	\$755	\$0	
I. NET PROFIT (LOSS) AFTER INCOME TAX	(\$620)	(\$620)	(\$820)	(\$2,601)	(\$289)	\$161	#####	(\$516)	\$86	\$86	\$86	\$110	\$0	

SCHEDULE 3													Pro Forma Cash Flow Forecast		
12 - Month Cash Flow Projections													YEAR 1		
Minimum Cash Balance Required = <input type="text" value="1000"/>															
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL		
Cash Flow From Operations (during month)															
1. Cash Sales	0	0	0	200	400	600	1,000	1,500	1,600	1,700	1,800	1,900	10700		
2. Payments for Credit Sales	0	0	0	0	0	0	0	0	0	0	0	0	0		
3. Investment Income	0	0	0	0	0	0	0	0	0	0	0	0	0		
4. Other Cash Income	0	0	0	0	0	0	0	0	0	0	0	0	0		
A. TOTAL CASH FLOW ON HAND	\$0	\$0	\$0	\$200	\$400	\$600	\$1,000	\$1,500	\$1,600	\$1,700	\$1,800	\$1,900	\$10,700		
Less Expenses Paid (during month)															
5. Inventory or New Material	0	0	0	0	0	0	0	0	0	0	0	0	0		
6. Owner's Salary	0	0	0	0	0	0	0	0	0	0	0	0	0		
7. Employee's Wages and Salaries	0	0	0	0	0	0	0	0	0	0	0	0	0		
8. Supplies and Postage	0	0	0	-30	-30	-30	-30	-30	-30	-30	-30	-30	-30	-270	
9. Advertising and Promotion	0	0	-200	-100	-100	-100	-100	-100	-100	-100	-100	-100	-100	-1100	
10. Delivery Expense	0	0	0	0	0	0	0	0	0	0	0	0	0		
11. Travel	0	0	0	0	0	0	0	0	0	0	0	0	0		
12. Legal and Accounting Fees (professional dues)	0	0	0	0	-450	0	0	0	0	0	0	0	0	-450	
13. Vehicle Expense	0	0	0	-100	-100	-100	-100	-100	-100	-100	-100	-100	-100	-900	
14. Maintenance Expense	0	0	0	0	0	0	0	0	0	0	0	0	0		
15. Rent	-200	-200	-200	-200	-200	-200	-200	-200	-200	-200	-200	-200	-200	-2400	
16. Utilities	-30	-30	-30	-30	-30	-30	-30	-30	-30	-30	-30	-30	-30	-360	
17. Telephone	-125	-125	-125	-125	-125	-125	-125	-125	-125	-125	-125	-125	-125	-1500	
18. Taxes and Licenses	0	0	0	0	0	0	-1,215	-186	0	0	0	0	0	-1401	
19. Interest Payments	-115	-115	-115	-115	-115	-115	-115	-115	-115	-115	-115	-115	-115	-1380	
20. Insurance	0	0	0	0	0	0	0	-75	-75	-75	-75	-75	-75	-375	
21. Other Cash Expenses	-50	-50	-50	-50	-50	-50	-50	-50	-50	-50	-50	-50	-50	-600	
B. TOTAL EXPENDITURES	(\$520)	(\$520)	(\$720)	(\$750)	(\$1,200)	(\$750)	(\$1,965)	(\$1,011)	(\$825)	(\$825)	(\$825)	(\$825)	(\$10,736)		
Capital															
Purchase of Fixed Assets	0	0	0	0	0	0	0	0	0	0	0	0	0		
Sale of Fixed Assets	0	0	0	0	0	0	0	0	0	0	0	0	0		
C. CHANGE IN CASH FROM PURCHASE OR SALE OF ASSETS	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Financing															
Payment of Principal of Loan	0	0	0	0	0	0	0	0	0	0	0	0	0		
Inflow of Cash From Owner	0	0	0	0	0	0	0	0	0	0	0	0	0		
Issuance of Equity Positions	0	0	0	0	0	0	0	0	0	0	0	0	0		
Repurchase of Outstanding Equity	0	0	0	0	0	0	0	0	0	0	0	0	0		
D. CHANGE IN CASH FROM FINANCING	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
E. INCREASE (DECREASE) IN CASH	(\$520)	(\$520)	(\$720)	(\$550)	(\$800)	(\$150)	(\$965)	\$489	\$775	\$875	\$975	\$1,075	(\$36)		
F. CASH AT BEGINNING OF PERIOD	\$0	(\$520)	(\$1,040)	(\$1,760)	(\$2,310)	(\$3,110)	(\$3,260)	(\$4,225)	(\$3,736)	(\$2,961)	(\$2,086)	(\$1,111)	\$0		
G. CASH AT END OF PERIOD	(\$520)	(\$1,040)	(\$1,760)	(\$2,310)	(\$3,110)	(\$3,260)	(\$4,225)	(\$3,736)	(\$2,961)	(\$2,086)	(\$1,111)	(\$36)	(\$36)		
MEET MINIMUM CASH BALANCE	FINANCE	FINANCE	FINANCE	FINANCE	FINANCE	FINANCE	FINANCE	FINANCE	FINANCE	FINANCE	FINANCE	FINANCE	FINANCE		

SCHEDULE 4		Pro Forma Balance Sheet	
	Opening	End of Year 1	
ASSETS			
Current Assets:			
1. Cash	0	10,700	
2. Accounts Receivable	0	0	
3. Inventory	0	0	
4. Other Current Assets	0	0	
A. TOTAL CURRENT ASSETS		\$0	\$10,700
Fixed Assets:			
5. Land and Buildings	0	0	
less depreciation	0	0	0
6. Furniture and Fixtures	0	0	
less depreciation	0	0	0
7. Equipment	0	0	
less depreciation	0	0	0
8. Trucks and Automobiles	0	0	
less depreciation	0	0	0
9. Other Fixed Assets	0	0	
less depreciation	0	0	0
B. TOTAL FIXED ASSETS		\$0	\$0
C. TOTAL ASSETS		\$0	\$10,700
LIABILITIES			
Current Liabilities (due within 12 months)			
10. Accounts Payable	0	0	
11. Bank Loans / Other Loans	0	0	
12. Taxes Owed		0	
D. TOTAL CURRENT LIABILITIES		\$0	\$0
Long-term Liabilities			
13. Notes Payable (due after one year)	0	0	
14. Other Long-term Liabilities	0	0	
E. TOTAL LONG-TERM LIABILITIES		\$0	\$0
F. TOTAL LIABILITIES		\$0	\$0
NET WORTH (Capital)			
SHARE CAPITAL			
Common Shares	0	0	
Preferred Shares	0	0	
RETAINED EARNINGS	0	10,700	
G. TOTAL NET WORTH		\$0	\$10,700
H. TOTAL LIABILITIES AND NET WORTH		\$0	\$10,700
		BALANCED	BALANCED

<u>SCHEDULE 5</u>		Break-even Point for First Year	
Operating Expenses			
Owner's Salary		0	
Employee's Wages		0	
Supplies and Postage		270	
Advertising and Promotion		1,100	
Delivery Expense		0	
Bad Debt Allowance		0	
Travel		0	
Professional Fees		450	
Vehicle Expense		900	
Maintenance Expense		0	
Other Variable Expenses		600	
Rent		2,400	
Utilities		360	
Telephone		1,500	
Taxes & Licenses		1,401	
Depreciation		0	
Interest		0	
Insurance		375	
Other Fixed Expenses		1,380	
TOTAL OPERATING EXPENSES		\$10,736	
CONTRIBUTION MARGIN =		$\frac{\text{Gross Margin}}{\text{Net Sales}}$	100.00%
BREAKEVEN POINT (\$Sales) =		$\frac{\text{Total Operating Expenses}}{\text{Contribution Margin}}$	
		\$10,736.00	

CONCLUSION

Based on the competitive analysis and pro forma financial statements completed for this report, Southwest Legal Services is a viable small business opportunity with goals that are attainable within the first year of operation. Key to business success is a well-executed marketing strategy with a keen focus on networking opportunities and on demonstrating the value that Southwest Legal Services can bring to potential clients. The financial risk will be mitigated by the owner retaining full time outside employment, and by utilizing independent contractors rather than hiring employees.

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APPENDIX 1 – QUARTERLY INDUSTRY REVENUE INDICES FOR SELECTED SERVICE INDUSTRIES

North American Industry Classification System (NAICS)	Seasonal adjustment	2010		2011		
		Q3	Q4	Q1	Q2	Q3
Accounting, tax preparation, bookkeeping and payroll services [5412]	Unadjusted	95.1 ^D	107.2 ^B	132.7 ^B	147.9 ^B	101.9 ^D
	Seasonally adjusted	116.9 ^D	118.3 ^B	121.8 ^B	123.9 ^B	125.1 ^D
Management, scientific and technical consulting services [5416]	Unadjusted	99.6 ^B	109.8 ^B	104.9 ^B	107.2 ^B	104.5 ^C
	Seasonally adjusted	101.2 ^B	106.0 ^B	105.0 ^B	109.0 ^B	106.4 ^C
Advertising, public relations, and related services [5418]	Unadjusted	98.1 ^A	111.5 ^A	94.8 ^A	103.8 ^B	96.2 ^B
	Seasonally adjusted	102.2 ^A	103.1 ^A	100.7 ^A	102.2 ^B	100.2 ^B
Employment services [5613]	Unadjusted	105.4 ^A	107.5 ^A	107.4 ^B	116.4 ^B	118.5 ^C
	Seasonally adjusted	103.3 ^A	104.2 ^A	112.6 ^B	117.8 ^B	115.7 ^C

** Retrieved March 16, 2012 from: <http://www5.statcan.gc.ca/cansim/a26>

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APPENDIX 2 – LISTING OF LICENSED PARALEGALS IN CHATHAM-KENT & LAMBTON COUNTY

	Licence Type	City	Postal Code	Status Status definitions
	Paralegal	Chatham		Licence Revoked
	Paralegal	Chatham	N7M 5L6	Not Providing Legal Services - Employed
	Paralegal	Chatham	N7M 5R9	In Private Practice
	Paralegal	Chatham	N7M 5M1	Providing Legal Services - Employed
	Paralegal	Chatham	N7M 5K1	Providing Legal Services - Employed
	Paralegal	Chatham	N7M 5W7	Not Providing Legal Services - Employed
	Paralegal	Chatham	N7L 0B4	In Private Practice
	Paralegal	Chatham	N7M 5M1	Providing Legal Services - Employed
	Paralegal	Chatham	N7L 3J3	In Private Practice
	Paralegal	Tilbury	NOP 2L0	In Private Practice
	Paralegal	Sarnia	N7T 5W5	In Private Practice
	Paralegal	Sarnia	N7T 7T9	Providing Legal Services - Employed
	Paralegal	Sarnia	N7V 3L8	In Private Practice
	Paralegal	Sarnia	N7T 5W5	In Private Practice (Practice Restricted)
	Paralegal	Sarnia		Deceased
	Paralegal	Sarnia	N7T 7T9	Providing Legal Services - Employed

** Retrieved from LSUC on-line paralegal directory August 27, 2012