CORE CONCEPTS

12:45pm - 1:45pm
REAL WORLD TECHNOLOGY SOLUTIONS FOR SMALL FIRM LAWYERS
Richard Ferguson
What technology do small firms need to practice successfully and profitably amidst disruptive events and challenges. Come learn what new tools you need to have in your toolchest and how to better use resources you already have to deliver quality legal services to client.

2:15pm - 3:15pm
SECRET'S OF MICROSOFT 365
Annette Sanders, Ben M. Schorr
Explore some of the less known features and capabilities of Office 365, including Teams, integration and automation.

3:45pm - 4:45pm
ADOBE ACROBAT DC: EXPLORING THE NEWEST FEATURES
Annette Sanders, Daniel J. Siegel
Adobe Acrobat DC is the most commonly used PDF product in law firms. Since 2020, Adobe has made dramatic changes to the product, while keeping the name the same, including redaction, digital signatures, document review and more. This program will also touch upon some of the .pdf program alternatives available to law firms.

ETHICS

12:45pm - 1:15pm
ETHICS OF REMOTE PRACTICE
Daniel J. Siegel
How does technology and working from home impact your professional responsibilities? Despite a rapidly changing environment, lawyers still have the duty to remain competent, which is one of the primary duties under the Rules of Professional Conduct. To be competent, we not only need to be technologically capable to be able to work remotely and effectively, but keep track of constantly changing regulations and laws. Cybersecurity has become a huge issue. What are lawyers required to do to protect the confidentiality of client information (Rule 1.6) when they are working from a home network and possibly from a personal device? And how should lawyers effectively communicate with their clients (Rule 1.4)? In stressful times, how do lawyers maintain civility and professionalism? The questions are many - let’s explore the answers together.

1:30pm - 2:00pm
LEGAL ETHICS IN DIFFICULT TIMES: A LAWYER'S BRIDGE OVER TROUBLED WATER
Shawn L. Holahan
The last year has created new challenges as lawyers attempt to continue to serve clients and comply with ethical rules. We’ll consider these new challenges, including working remotely, how to be diligent and communicate well during these uncertain times, and maintaining confidentiality and cybersecurity while working remotely (and frequently from home).

2:15pm - 3:15pm
ETHICAL AI: PLAYBOOK FOR A RAPIDLY CHANGING WORLD
R. Patrick Huston, Natalie Pierce
During this dynamic presentation, you will get tips to successfully leverage AI in the global business and national security settings. Learn the interplay between AI and cybersecurity, practical tips for using AI legally and ethically, “Deepfakes” and other emerging risks, and how to secure early-stage funding and ultimately lucrative technology contracts.

3:45pm - 4:15pm
THE TIMES THEY ARE A’CHANGING: THE SHIFTING REGULATORY LANDSCAPE
Ann A. Scott Timmer
Regulatory reform is underway in Utah, Arizona and California; and other states are currently both watching those states and beginning to explore amendments to the regulation of the practice of law. This session, presented by those involved in these historic changes, will highlight the reasons for the change, the pushback they are still encountering, and guide you through the changes to the practice of law that are taking place. This session walks through the changes, highlights the differences between the various states involved in this reform, and explores changes that may still be on the horizon.

DIVERSITY

12:45pm - 1:45pm
THERE’S ROOM FOR YOU TOO: CREATING AND CULTIVATING DIVERSITY BY EMPOWERING AND DEVELOPING LAWYERS WHO LEAD
Temi Sylanbade
Our society is enjoying amazing innovation and rapid change driven by our most diverse, most educated, and most misunderstood generation: the millennials. They are literally the future and are successfully mastering the art of empowering and inspiring diversity and leadership that will ultimately determine your firm’s success and impact in the world. Explore practical ways to foster diverse communities within your firm and harness the power that will fuel our future.

2:15pm - 3:15pm
HARNESSING AND MAXIMIZING TECHNOLOGY AND DATA TO DRIVE DIVERSITY, EQUITY, AND INCLUSION IN THE LEGAL PROFESSION
Gretchen C. Bellamy, Kellye Gordon, Daniel Winterfeldt, Rebecca Hernandez Benavides
Can technology and data accelerate change for talent and diversity, equity, and inclusion in the legal sector?

3:45pm - 4:45pm
COURAGEOUS CONVERSATIONS: WHAT LEADERSHIP ON RACIAL JUSTICE LOOKS LIKE IN THE LEGAL COMMUNITY
Dawn Jones, CK Hofller, Erin H. Gerstenzang
A law degree bestows a special status and privilege in our society. No other degree affords the same proximity to courts and government and this creates a unique opportunity for lawyers to choose to be on the front lines of racial justice issues.
12:45pm - 1:15pm
COLLABORATING: WHAT IS THE BEST TOOL?
John E. Grant, Kenton Brice
Especially now when collaborating is so critical, what is the best tool to meet your firm’s needs. Do you even need a new tool? Using a comparison of Microsoft Teams and Slack as a foundation, this session will help you decide how to assess your collaboration needs and find the right tool for the job.

1:30pm - 2:00pm
WRAPPING YOUR MIND AROUND MICROSOFT TEAMS
Non-CLE
Ben M. Schorr, Josh Leporati
Microsoft Teams is the newest tool used by law firms and courts. Take a deeper dive into Microsoft Teams and learn how the many varied features of Teams will help your firm members stay connected, organized and stay on top of your projects.

2:15pm - 2:45pm
MASTERMIND: STARTING AND GROWING YOUR BRAIN TRUST
Non-CLE
Gretchen Jackson
In his book, Think and Grow Rich, Napoleon Hill states, “no two minds ever come together without thereby creating a third, invisible intangible force, which may be likened to a third mind”, also known as, the Mastermind. When you come together with a diverse set of people to serve a specific purpose, you are able to unlock the answers to questions you have, see situations completely differently, and come up with solutions you would not have on your own. The idea is collaboration over competition in helping one another reach their goals.

3:00pm - 3:30pm
SHOULD I STAY OR SHOULD I GROW?
Stephanie Everett
Stay solo, partner with other lawyers to build a better firm, or expand? Explore the legal and practical considerations for making this decision.

3:45pm - 4:15pm
COLLABORATION AND LAW PRACTICE MANAGEMENT PROGRAMS
Hong Dao, Natalie Robinson Kelly
Discover the best law practice management programs and other tools to help you collaborate with clients and colleagues and offer secure and collaborative ways to engage with clients for a more rewarding experience.

4:30pm - 5:00pm
BREAKING THROUGH KNOWLEDGE TRANSFER BARRIERS WITH CROSS-GENERATIONAL CONVERSATION: KNOWING YOUR AUDIENCE
Kami Hoskins
Baby Boomers, Millennials, Gen-X? Whether you are hiring new associates, or dealing with your firm’s older partners, understanding a generational group’s expertise and work styles and participating in healthy cross-generational conversations is essential to creating a non-threatening workplace and ensuring mutual respect, understanding and productivity. Learn about how to best communicate within your firm and in the legal community to create the best result for you, your firm and your clients.

Tuesday
03.09.21

2:45pm - 3:45pm
INNOVATING TOWARDS A BETTER NORMAL
Ed Walters, Jack Newton
2020 was a difficult—but transformative—year where lawyers were challenged to operate in a pandemic and economic downturn. What are lawyers doing to innovate, operate, and build their practices in a rapidly changing landscape? How are we building toward not just a new normal, but a better normal? In this presentation, we share practical examples of how small law firms around the country have designed simple yet innovative legal services that insulate their businesses during times of volatility and best prepare them to thrive in the future.

1:15am - 1:45am
LAWYER’S GUIDE TO ZOOM
Juda Strawczynski
As lawyers moved to working remotely, they flocked in droves to Zoom for video conferencing. As they quickly learned, it was easy to use—and their clients loved it too. Zoom is rich in features, but to use it competently you need to understand the platform. This session is designed to introduce you to the many ways you can use Zoom in the practice or law—with an eye to making sure that you are using the platform securely and effectively.

12:00pm - 1:00pm
MANAGING, MOTIVATING, AND RETAINING VIRTUAL & TELECOMMUTING TEAMS
Andrew Elowitt, Marcia Watson Wasserman
How do you pivot your practice to allow attorneys and staff to work remotely while maintaining high levels of connectivity, productivity, and accountability? What management techniques and technologies work best to foster team collaboration, communication, and morale while everyone is physically distanced? Answer these questions and more in this session.

1:00pm - 2:00pm
THE CASE FOR PRACTICE MANAGEMENT SOFTWARE: ONE STOP SHOPPING FROM CONFLICTS TO COMMUNICATION
Catherine Sanders Reach, Charity Anastasio
In an ever-evolving marketplace lawyers have many choices in practice management software/services. What will work for you, your staff and your clients? How should you decide among the many choices?
2:45pm - 3:45pm  
PAPERLESS: THE NEXT GENERATION!  
Daniel J. Siegel  
The move to paperless law firms has been underway for years. Going paperless, or paper on demand, means less paper, more scanning, e-document storage and backups. What are the lessons learned by lawyers and law firms from years of experience with paperless practice?

WELL-BEING

11:15am - 11:45am  
THE PSYCHOLOGY OF WELL-BEING  
Kimberly Y. Bennett  
Psychological well-being consists of positive relationships with others, personal mastery, autonomy, a feeling of purpose and meaning in life, and personal growth and development. This session will explore the intersection of well-being, mental health and the law and identify practical applications to improve well-being for legal professionals and clients.

Wednesday  
03.10.21  
MARKETING

11:15am - 11:45am  
CREATING A MARKETING BLUEPRINT Non-CLE  
Stephanie Everett  
In this interactive workshop we’ll explore the factors that go into creating a marketing plan for your law firm. We’ll explore how your firm’s mission statement, vision and core values will impact your marketing. Learn about how to create a client persona to focus your marketing, and how to create the value proposition that will enable your firm to thrive through these uncertain times.

2:45pm - 3:15pm  
WORKSHOP: THE LIFE COACH ACOYLES  
Brooke Moore  
We can’t always control external factors and the circumstances in our lives but we can choose how we feel about them and how we respond to them. Thoughts become things. Seriously. It’s a little science and a little woo but we do have the ability to attract more of what we want in life by rewiring our brains and shifting our narratives through a process called thought modeling.

12:00pm - 12:30pm  
THOUGHT MODELING WORKSHOP: THE LIFE COACH ACOYLES  
Brooke Moore  
We can’t always control external factors and the circumstances in our lives but we can choose how we feel about them and how we respond to them. Thoughts become things. Seriously. It’s a little science and a little woo but we do have the ability to attract more of what we want in life by rewiring our brains and shifting our narratives through a process called thought modeling.

1:00pm - 1:30pm  
CREATING CLIENT-CENTERED MARKETING Non-CLE  
George Pisharis  
What does client-centered marketing mean? We’ll explore marketing as it relates to optimizing the client experience, how you can optimize your rate of conversion from potential client to actual client, and how to reduce potential friction points.

1:45pm - 2:15pm  
TEARDOWNS  
LAW FIRM WEBSITE  
Megan Boyd  
In this interactive session, we’ll teardown law firm websites, look at the best and the worst and discuss practical tips so you can build yours up!

2:45pm - 3:45pm  
WELL-BEING: A MODERATED PANEL  
Brooke Moore, Nefra MacDonald, Olivia Vizachero  
Building on the content you’ve already learned about lawyer well-being, this panel will explore how to take what you’ve learned and implement changes in your firm and in your personal life to enhance lawyer wellness and well-being.

2:45pm - 3:45pm  
HOW TO USE BRANDING TO MAINTAIN A DIVERSE LEGAL WORKFORCE AND ELIMINATE BIAS, IN ANY ECONOMIC ENVIRONMENT Non-CLE  
Katy Goshtasbi  
Our personal brands make us unique as lawyers, but they may create an environment where conflict reigns and diversity is lacking. In this interactive session, explore the connection between diversified legal environments that actively seek to eliminate bias and attorney-client/attorney-attorney relationships, how you
can have a corporate legal culture that mitigates business risk AND still drives creativity and innovation; how you can maintain a diverse law firm and utilize this diversity to grow, hire and manage employees; and the Five “Cs” of brand management to achieve, and cultivate, diversity in your law firm environment and in attorney-client relationships.

3:30pm - 4:00pm
EMAIL MARKETING WORKSHOP Non-CLE
Julie Clarkson
In this interactive session, we’ll explore email marketing including how to build your email list, how to automate your email marketing and what your message to prospective legal clients should be.

VIRTUAL/REMOTE

11:15am - 11:45am
BEST PRACTICES FOR SECURING YOUR VIRTUAL PRACTICE
David G. Ries
Attorneys are cautious about working in the cloud and becoming dependent upon technology. However, practicing with the assistance of technology is not only essential in modern day, it’s continuing to shape and change the future of the practice of law.

12:00pm - 12:30pm
SET IT & FORGET IT: VIRTUAL WORKFLOW AUTOMATION
Regina Edwards
Working virtually requires working efficiently. Automating your workflows from intake to closing improves quality and consistency within your firm and saves you time. Automated workflows also allow you to avoid menial tasks and focus on revenue generating activities.

1:00pm - 2:00pm
GOING VIRTUAL: UNCONVENTIONAL LAW FIRM DESIGN
Brooke Moore
Clients are driving changes in how they receive legal services. Alternative legal service providers are meeting client demands and capturing market share. In order to remain competitive, attorneys must rethink the way they practice law and design client-centric law firms that promote attorney well-being also.

2:45pm - 3:15pm
CREATING THE FRAMEWORK: VIRTUAL LAW OFFICE MODELS
Bahar Ansari
Virtual law practice does not have to be all or nothing. You can add virtual components to your practice and still reap some benefits of practicing virtually. Virtual law office models are designed in a way to create a win-win law firm model solution for the client and attorney.

3:30pm - 4:00pm
VITAL COMMUNICATION TOOLS & TIPS FOR THE VIRTUAL PRACTITIONER
Darlene Tonelli
Communication is key in successfully running a virtual practice. It is important to utilize technology that is easy to use and secure. Organizing your internal and external communications will protect you and increase overall efficiency in your firm.

FUTURE PROOF

11:15am - 11:45am
WITH: TECHNOLOGY TO WORK SMARTER AND NOT WORK TOO HARD
Melanie Leonard
Explore ideas to work smarter rather than harder in the legal environment from simple document creation and editing, transcription, virtual task delegation, and more.

12:00pm - 12:30pm
RECONFIGURING OFFICES AND BEST PRACTICES FOR 2021 AND BEYOND: REIMAGINED WORKPLACES AND WORKSPACES Non-CLE
Laura L. Keeler
Transitioning your firm from bricks and mortar to alternate work places and work spaces was done with little to no planning with the advent of stay-at-home orders and quarantines. Now is the time to take time to reimagine your physical presence and footprint for the new normal. Explore best practices for remote working, hoteling, and more, and what is right for you, your firm and your clients.

1:00pm - 1:30pm
TECH COMPANY PROJECT MANAGEMENT TECHNIQUES THAT LITIGATORS SHOULD STEAL
Jacqueline G. Schafer
We’ve all had times where we’re scrambling to make a litigation deadline—trying to incorporate those last comments from the client, finding that exact line in the transcript to support your argument, and building in enough time for your paralegal and legal assistant to clean up the formatting. Project management was never taught in law school, but as the attorney signing your name on the brief, you’re often playing a role that shares many similarities to a project manager at a tech company.

1:45pm - 2:15pm
IS LEGAL INNOVATION AN OXYMORON?
Reid F. Trautz
With all the talk about innovation in law firms, what does successful innovation look like? Is it innovation for the lawyer or innovation for the client? What are the keys to successful innovation efforts?

2:45pm - 3:15pm
TIPS FOR LIVING THE MULTI-DEVICE LIFESTYLE
Regina Edwards
Today, everyone lives the multi-device lifestyle; lawyers and clients are no exception. Most people have a computer and a smartphone, however when you add a tablet or Mac to the mix, all sorts of opportunities to leverage the synergy that a plethora of devices brings becomes available. Explore how to best navigate this digital maze to efficiently and effectively serve your clients.

3:30pm - 4:00pm
PROFITABLE AND PRACTICAL TIPS TO FUTURE-PROOF YOUR LAW FIRM
Dan Pinnington
There are two futures: The one we create for ourselves or the one we let others create. Lawyers must not be complacent in waiting for someone else’s future to arrive, but rather get involved in making changes for their preferred future. Future Proofing has been the subject of a monthly column in Law Practice Magazine. Join one of the authors of that column for practical tips, helpful ideas, techniques and strategies to help prepare your firm for your preferred future.

LEADERSHIP

11:15am - 11:45am
SCALING SOCIAL IMPACT & AMPLIFYING EMPATHY: HOW LEGAL PROFESSIONALS CAN BE LEADERS FOR CHANGE
Rukayatu Tijani
We’re in quite an interesting time. COVID-19, inequitable access to justice, and systemic racism, are forcing the legal field to assess the ways it has traditionally served businesses and diverse founders. Explore a new way of “doing law” so law firms may remain a relevant and viable institution in our society today. This session will explore how tech automation and a clear marketing message centering social impact and diverse viewpoints can shape the new way young attorneys are practicing law. Come to learn, be inspired, and acquire powerful tools to make social impact in your own right.
12:00pm - 12:30pm
HOW OUR IDENTITIES SHAPE OUTCOMES
Safaya Fawzi, Gretchen C. Bellamy

During this session, we will engage in a “privilege walk” activity, and begin a preliminary, in-depth discussion about interpersonal and institutional racism. We will take from the Racial Healing Handbook and other workbooks and resources focused on unpacking one’s racial history and experiences.

1:00pm - 2:00pm
PRACTICAL TIPS TO AMPLIFY YOUR LEADERSHIP AND IMPACT
Nkoyo-Ene Effiong, Natalie Anne Knowlton, Tiffany M. Graves

As legal service providers, we have access to power and privilege on account of knowledge, resources, skills/training, networks, and overall ability to navigate the legal system. Many of our potential clients or consumers do not. To expand our impact, there are low-tech ways in which we can close the justice gap through intentional relationship building that equips people who otherwise cannot afford legal services to take the next best step. In this talk, we will explore how to shift our language and our actions to advocating “alongside” rather than “on behalf of” our clients or consumers.

2:45pm - 3:45pm
LEADERSHIP: A MODERATED PANEL
Rukayatu Tijani, Safaya Fawzi, Natalie Anne Knowlton, Tiffany M. Graves, Nkoyo-Ene Effiong

After unlocking your mind to the impact you can achieve as a solo practitioner or small law firm, join our speakers for a panel on how you can apply this to your own practice.

12:00pm - 12:30pm
SOLVING THE SMALL LAW BILLING PROBLEM
Hunter Steele, Ruchie K. Chadha

Small law firms and their staff play a very important role within our communities yet on average they are billing for only 25-30% of their day. How are firms to provide a great service, produce good results, and build a great business when there is a fundamental problem with the unit economics of what they do? The increase in complexity of billing, and the increase in the sheer number of iterative transactions that fee earners deal with and perform on a daily basis, has made it all too difficult to keep track of time, and to understand the profitability of fixed and contingency cases. This session will explore why small law firm’s billing’s complexity has increased, and what small law firms can do to move back towards being fairly paid for the work they and their teams are performing every day.

1:00pm - 1:30pm
HOW TO ACHIEVE ZERO AR
Raza Hasan, M David Johnson

This session will focus on how firms can improve their collection rate to 97%+ using modern technology tools and processes that puts them in control of when they are paid for their work, resulting in a zero balance on their Accounts Receivable sheet.

1:45pm - 2:15pm
CANNABIS LAW: WHAT YOU NEED TO KNOW TO REPRESENT CLIENTS IN THE COUNTRY’S FASTEST-GROWING INDUSTRY
Amanda Ostrowitz, Esq.

The pandemic has put a strain on many industries that were once the top revenue producers for law firms. While a few prospered in the pandemic-driven economy (divorce, business restructuring, health care) cannabis has been the biggest standout. The cannabis industry has maintained its upwards trajectory thanks in part to being deemed an “essential business” in many states, and industry watchers are optimistic that as the nation emerges from the pandemic, legalization will continue as states search for new tax revenue opportunities to rebuild their economies. This, coupled with increasing public acceptance of cannabis, could spur further policy reform. Combine that with increased deal flow, it’s hard to deny the growth potential for law firm revenue.

In the first half of this session, you will learn how hemp, CBD, and cannabis are regulated, the various layers of law that must be analyzed when working with clients from state to state, and the type of obstacles that are often dealt with at each level. Participants will also receive a high-level overview of the newest states that voted to legalize cannabis in the November 2020 election, as well as the various states currently working to legislatively legalize cannabis. The second half of the session will cover practical advice for practitioners seeking to work in the cannabis sector. For example, legal tech tools that help law firms bypass months of studying, areas of specialty that are needed in the cannabis industry, practice areas that naturally transition and/or overlap with cannabis, and the various ways law firms have grown their cannabis practices. Moreover, it will discuss critical conversations that law firms must have pertaining to malpractice insurance, state ethics opinions, and how public they want to be about their involvement in the sector.

2:45pm - 3:15pm
LEGAL ACCOUNTING STRATEGIES TO STREAMLINE YOUR FIRM OPERATIONS AND INCREASE YOUR PROFITABILITY
James Andrew Hinds Jr., Gerry Anderson, M.Sc., CPA

In law school attorneys are taught to work complex cases, not how to manage firm operations. However, in order to stay competitive, law firms must have fresh, modern solutions implemented to provide management, timekeepers, and staff the tools they need to effectively streamline internal processes and seamlessly manage firm operations. The daily frustration of balancing billable vs. overhead hours just to get paid can be a daunting process for practicing attorneys, not to mention the overwhelming thought of managing the firm’s business operations. Join us as we discuss how, why, and when to implement innovative legal accounting procedures within your law firm to streamline processes, expedite payment processing, mitigate risk of aged receivables, and to obtain consistent, real-time data that will allow you to accurately forecast, budget, and manage business operations.

3:30pm - 4:00pm
IMPROVING CLIENT EXPERIENCE THROUGH TECHNOLOGY
David Hepburn, Cody Bender, Aaron Minc

Every law firm says that they are client focused. As a lawyer, your top priority is your clients. But how do you put this into action? We know the lawyer-client relationship is fundamental to keeping clients happy and coming back. However, no one person can control client experience in its entirety – it is a firm-wide endeavor. Client experience is made up of 100s of touchpoints throughout the client’s journey with your firm. From the first response they get from an inquiry form or calling your reception desk, to the updates they receive from you and your team throughout their matter or the ease
of access they have to case files. The challenge is how you and your team keep up with client expectations for each of these touchpoints. Especially when service expectations are getting higher all the time. So, how do you make sure every interaction and communication your client has with your firm adds up to exceptional client experiences?

Thursday 03.11.21

MARKETING

12:30pm - 1:00pm
CLIENT RELATIONSHIP MANAGEMENT WORKSHOP Non-CLE
Gyi Tsakalakis
Workshop: CRM

1:15pm - 1:45pm
SOCIAL MEDIA WORKSHOP Non-CLE
Sonia Lakhaney
Social Media Clients hire lawyers they know, like, and trust. Learn how to use social media to meet more people and demonstrate professional expertise (sorry we can’t make you more likeable).

2:00pm - 2:30pm
ADVERTISING WORKSHOP Non-CLE
Dana DiTomaso
Getting into online ads without knowing how you’re going to optimize your spend? You might as well set a pile of money on fire and livestream it to Facebook — you’ll get a better return on investment. In this workshop, you will learn how to calculate ROAS, and which KPIs to focus on in your online advertising.

2:45pm - 3:15pm
MARKETING MEASUREMENT WORKSHOP Non-CLE
Conrad Saam
Workshop: Measurement (Analytics, UTM Parameters, Goals, Dashboards, Closing the Loop)

3:45pm - 4:15pm
ONLINE COMMUNITIES WORKSHOP Non-CLE
Ticora E. Davis
While technology provides a seemingly endless multitude of marketing tools, at the end of the day, law practice remains a reputation and relationships business. Find out how to put technology like Facebook and Slack to work to create, nurture, and solidify professionals relationships online.

4:30pm - 5:00pm
MARKETING TECHNOLOGY TOOL TRENDS Non-CLE
Gyi Tsakalakis
Where is marketing technology headed? The prognosticators prognosticate. Get a sneak peek of what you’ll be using to market your practice tomorrow.

VIRTUAL/REMOTE

12:30pm - 1:30pm
REMOTE TEAM MANAGEMENT: INNOVATIVE APPROACHES & BEST PRACTICES Non-CLE
Lauren Rosenthal, Joey Silberfein
A remote-friendly approach allows firms to attract a wider range of talent, support a diverse workforce, and develop an inclusive culture. Create high-performing, collaborative, distributed teams with processes that promote strong relationships and professional growth.

2:00pm - 2:30pm
GO WITH THE WORKFLOW: IMPROVING YOUR VIRTUAL CLIENT INTAKE Non-CLE
Billie Tarascio
Working virtually requires working efficiently. Automating your intake workflow improves quality and consistency within your firm and saves you time. Automated workflows also allow you to avoid menial tasks and focus on revenue generating activities.

2:45pm - 3:15pm
CLIENT PORTALS: THE CORNERSTONE OF VIRTUAL PRACTICE Non-CLE
Jim Calloway
The key component of a virtual practice is utilizing a user-friendly client portal. Client portals provide wide functionality from document sharing to communications to collecting payments. The client portal is also a safe, secure place to store and exchange information.

3:45pm - 4:15pm
OUTSOURCING AS AN EFFICIENCY TOOL Non-CLE
Courtney Troutman
If you feel like you practice law in-between running to the post office, answering the phone, and figuring out how to format a document, you may suffer from TDTM (TRYING to DO TOO MUCH) Syndrome. TDTM can lead to inefficiency, lost revenue, and burnout. The cure may be outsourcing the tasks that you don’t need to do yourself so you can focus on practicing law.

4:30pm - 5:00pm
BUILDING A LIFESTYLE LAW FIRM: BENEFITS OF VIRTUAL PRACTICE Non-CLE
Laura O’Bryan
While the convenience of virtual law practice benefits clients, practicing virtually also has benefits for the attorney. Building a virtual law firm allows you the flexibility to design a practice around your unique life circumstances. Technological advances have made virtual practice more feasible and the firms embracing technology more competitive in the evolving legal market.
1:15pm - 1:45pm
AUTOMATION TOOLS FOR TRANSACTIONAL ATTORNEYS
Samir Patel
Do you practice in a transactional area of law? This session is focused on your needs as a practitioner. Discover software that supports your automation needs and your practice.

2:00pm - 2:30pm
DOCUMENT AUTOMATION AND FIXED FEES RELATIONSHIP
Non-CLE
Hugh Logue
Clients wonder why the preparation of a simple legal document costs so much. Legal clients want certainty in legal fees, not surprises. Attract clients with transparency and flat rates. Learn how to use document automation so that you may offer clients fixed fees.

2:45pm - 3:15pm
USING DOCUMENT AUTOMATION PLATFORMS TO CREATE DIY SERVICES & PASSIVE INCOME
Lauren Lester, Rob Alexander
Learn to expand your legal practice by serving the 85% of those with legal issues who do not consult a lawyer. By using client portals, templates and forms created by answering a few questions, augmented by simple attorney reviews, you can build a practice serving those missed clients with minimal administrative effort and maximum efficiency.

3:45pm - 4:15pm
MIXING PEOPLE AND AUTOMATION: FINDING THE SWEET SPOT
Chris Fortier, Alisson C. Williams, Esq.
When you automate, you simplify. But without the repetition, will your team be able to discuss a case’s nuances and come to a consensus on an action plan? Build training for associates and paraprofessionals in your practice that includes automation tools and complementary materials.

4:30pm - 5:00pm
AI WORKFLOWS AND AUTOMATION IN LIEU OF HUMAN INTERPRETATION
Damien Riehl
So, you want to use AI in your practice? Great but it is not foolproof. We will show how you can use AI and automation in your law practice and still comply with the rules of professional conduct and best practice. You will know where to find data black holes and learn how to train AI systems to accurately review your work and make your practice more efficient and effective.

Friday
03.12.21

11:15am - 11:45am
APPLYING WHAT YOU LEARNED AT TECHSHOW: MARKETING Non-CLE
Stephanie Everett
Take the marketing ideas you have learned at TECHSHOW and create a plan to implement them in your law practice. Leave this session with a “to do” list of practical steps you can start on immediately to build and grow your practice through effective legal marketing.

12:00pm - 12:30pm
APPLYING WHAT YOU LEARNED AT TECHSHOW: TRUST ACCOUNTING
Reid Potter
You see lots of flashy products that look great but you are not sure which one will fit your firm’s needs. If you need a trust account, how will you manage it? Where should you put legal fees, and what factors should you consider in deciding how to manage your trust funds? We’ll take a deeper dive into getting paid and how a variety of financial scenarios may impact your law firm financial management, focusing on trust accounting.

12:45pm - 1:15pm
APPLYING WHAT YOU LEARNED AT TECHSHOW: OPERATIONS TO AUTOMATE
Charity Anastasio
You’ve learned how automation can improve your law practice and your service to your clients at this week’s TECHSHOW. Now take the next step and begin to use what you’ve learned to design your project workflow to improve operations, manage the changes effectively, and focus your employees on doing the things you hired them to do - like serving your clients and creating documents that wow.

1:30pm - 2:00pm
APPLYING WHAT YOU LEARNED AT TECHSHOW: MANAGEMENT/CULTURE
Non-CLE
Safaya Fawzi
Take time to bring the aspects of great company cultures to your practice of law and firm. From Diversity and Inclusion to training and Professional Development, come prepared to learn how to keep employees, coworkers, and peers motivated to achieve your goals and best serve your clients.
2:15pm - 2:45pm
HOW DO YOU STAY IN LINE WITH YOUR BUSINESS/STRATEGIC PLAN?
Elizabeth Overmoe
You have this wonderful business plan, or strategic plan, for your law firm but want to be sure you stick to your plan. Learn about best practices you may employ to stick to your business plan. Learn how to design goals and metrics to hold yourself accountable. Design a plan implementation strategy that includes how to measure opportunities and later organization evaluations to you and your employees accountable.

3:00pm - 3:30pm
INNOVATION OR THE CLIENT: WHICH COMES FIRST? Non-CLE
Dan Elliott
Do you buy the technology and introduce it to the client, or do you get the client and then get the technology needed to serve the client? Design thinking is a way to be sure you are best serving both your needs and the clients’ needs - it’s not the chicken or the egg.

11:15am - 12:15pm
TOOLS YOU DIDN’T KNOW YOU NEEDED: E-SIGNATURES, REMOTE NOTARIES, AND BEYOND
Temil Silyanbade, Danielle M. Hall
We get it. Last year, you wanted to stay afloat and you heard of these tools that make practicing remotely possible. We’re talking about tools like e-Signatures, remote notaries and more. Learn the value of these essential services and make sure you are getting the right product at the right price that keeps you practicing and your clients served.

12:00pm - 12:30pm
TECH ETHICS IN A WORLD MOLDED BY THE COVID-19 PANDEMIC
Megan Zavieh
We learned from COVID-19 that lawyers and law firms have to be nimble. During this session, we will discuss how COVID-19 was an impetus for remote work and largescale rapid tech adoption, with a focus on how the Rules of Professional Conduct shaped this transition, what may need to change in the rules to adapt next time, and how lawyers can operate a tech-forward law firm ethically, from being paperless to using appropriately secure remote communications.

12:45pm - 1:45pm
REBOOTING A PRACTICE: DISASTER & CONTINUITY PLANNING
Richard Ferguson
Earthquakes, wind, fire, flood water... all can destroy buildings, ruin lives, and create havoc. The same can be said for pandemics and social unrest. Lawyers have a fiduciary duty to protect client information and client interests. Learn how to create disaster recovery and business continuity plans to protect your practice and your clients; how do you plan to meet the unexpected?

2:15pm - 2:45pm
CYBERSECURITY & DECEPTION: THE YEAR IN REVIEW AND LESSONS FOR THE FUTURE Non-CLE
Lincoln Mead
From collaboration to file storage and editing, we do everything in the cloud or on servers, which introduces new vulnerabilities in our duty to protect client and firm data. With large organizations getting compromised, classrooms getting "zoom-bombed," and other compromises, 2020 introduced new threats to how we do business. What did we learn?

3:00pm - 3:30pm
SETTING BOUNDARIES TO CREATE WORK-LIFE BALANCE AND IMPROVE YOUR PRODUCTIVITY
Danielle M. Hall
Boundaries are important. In sports, they define the area of play. In personal relationships they mark the limits one establishes in a relationship. But what about professional boundaries? Professional boundaries are designed to protect both, the client and the lawyer. They define effective and appropriate interaction between the parties. Without boundaries problems can arise, schedules can implode, and the lawyer can lose a sense of work/life balance. The failure to set healthy boundaries can also lead to ethical violations. With the increased use of technology in the law practice, the boundary lines can sometimes begin to blur. In this session, we will discuss the importance of setting boundaries and how the lack of boundaries can lead to potential stress, burnout, and ethical issues. We will discuss how to set boundaries and put a plan into action, how to use technology appropriately to help keep boundaries, as well as the positive effects it can have for your work and your well-being.

11:15am - 12:15pm
THE FUTURE OF AI, MINDMAPPING, AND ONLINE DISPUTE RESOLUTION
Dr. Bonnie Aylor, David J. Bilinsky
This session will explore the expanding Online Dispute Resolution Movement. It will provide a brief overview of different types of ODR technologies that are already in use and based on AI. Discuss the AI decision process by way of mind maps, nodes, and machine learning. Speakers and participants will examine the ethical concerns associated with ODR, with particular focus on the necessity of licensed attorney oversight of legal AI creation. Finally, some possible future alternatives for regulation of ODR systems will be analyzed.

12:45pm - 1:45pm
NEW SKILLS FOR A REMOTE WORLD: THE EVOLUTION OF INSTRUCTION TO BECOME TECHNOLOGICALLY COMPETENT
Nicole Morris, Jennifer Wondracek, Debbie Ginsberg
COVID-19 has changed the way attorneys work. Attorneys are suddenly doing everything in a remote world: working, communicating with clients, notarizing documents, participating in court proceedings, and similar activities. The duty of technology competence encompasses all these skills and requires a evolving means of helping law students and lawyers develop these necessary skills.
ethical hot water. In this session Kimberly Bennett will pull back the curtain on subscription and unbundled legal services products and explain how to structure these representations to comply with the Model Rules of Professional Conduct.

**LITIGATION**

**11:15am - 11:45am**

**ONLINE DISPUTE RESOLUTION**

Ben Barton

Online dispute resolution is becoming a more common tool and is a vital piece of the access to justice solution. How is it working now? Who is using it? What are the advantages and what are the pitfalls? Is this a tool to make justice more accessible or does it just pose another barrier to justice?

**12:00pm - 12:30pm**

**CLOUD BASED E-DISCOVERY FOR SMALL FIRMS Non-CLE**

Jennifer L. Brandon

Small firms with limited resources may find eDiscovery challenging. This session will explore what e-discovery means; how to manage it if you are a solo or small firm practitioner, and explore the features that are key to getting the most bang for your buck.

**12:45pm - 1:15pm**

**TRIAL ADVOCACY WHILE INSIDE YOUR ZOOM BOX**

Hon. Daniel G. Martin

The virtual courtroom presents challenges for both the court and counsel. In this session, attorneys will learn how to navigate the virtual platform and effectively present arguments and evidence.

**1:30pm - 2:00pm**

**PRETRIAL IN THE VIRTUAL WORLD**

Paul J. Unger

How do you get ready for litigation in the virtual world? This may include pretrial depositions, witness preparation, getting evidence ready for virtual presentation and strategizing the best way to present your case.

**2:15pm - 3:15pm**

**ARTIFICIAL INTELLIGENCE AND ANALYTICS IN LITIGATION AND BEYOND**

Maura R. Grossman

Today, data-driven decision-making is used in everything from credit to education, from housing to employment, and from healthcare to policing. This session will cover the different ways AI and analytics are being used today in the legal profession, and touch on some of the challenges they pose for attorneys.

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**CLE Information**

States typically decide whether a program qualifies for CLE credit in their jurisdiction 4-8 weeks after the program application is submitted. For many live events, credit approval is not received prior to the program. The ABA will seek 10 hours of CLE credit in 60-minute states, and 12 hours of CLE credit for this program in 50-minute states including 3 hours of CLE ethics credit in 60-minute states and 3.6 hours of CLE ethics credit in 50-minute states. Credit hours are estimated and are subject to each state’s approval and credit rounding rules. Please visit the program website at www.techshow.com for program CLE details or visit www.americanbar.org/mcle for general information on CLE at the ABA.

A limited number of scholarships to defray registration fees may be available for government employees, public interest lawyers employed with nonprofits, academics, and law students, as well as unemployed attorneys. To apply, send a letter outlining the basis for your fee waiver request to Lyndsey Kent at lyndsey.kent@americanbar.org. All requests must be received February 1, 2021. For courses costing over $500, attorneys who qualify will receive at least a 50% reduction in the course fee(s). This does not include any reduction in lodging or travel costs.

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Titles, sessions, descriptions, and speakers are subject to change. Please note all times listed are in Eastern Standard Time (EST).
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Pricing Options

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*Law students must be ABA Members to register at the law student rate. You can learn more and become a member on americanbar.org. Remember, membership is FREE, and you can GO PREMIUM ($25) for extra benefits.

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