

Sunday, April 2

## PIPIE: Personal Injury Practice Idea Exchange

Sunday, April 2 9:30 AM - 4:30 PM

Join this exceptional networking experience to share solutions and discuss the current problems unique to the personal injury plaintiff practice. If you can't stay all day, participate as much as your schedule allows. You will enjoy round-table discussions and informal sharing, and will determine the topics you wish to discuss. These may include human resources, strategic planning, marketing, financial management, and computer hardware and software issues for personal injury firms.

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## BOIE: Branch Office Managers Idea Exchange

Sunday, April 2 12:30 PM - 1:45 PM

If you are a branch office manager, you won't want to miss this idea exchange. Join your peers to exchange ideas and best practices unique to your position; then bring back information and practical tips you can share at your firm or legal department.

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## LFPAIE: Large Firm Principal Administrators Idea Exchange

Sunday, April 2 12:30 PM - 4:30 PM

NOTE: For purposes of participating in this Idea Exchange, a principal administrator is defined to mean the firm's chief non-lawyer operating officer or administrator, generally carrying the title of Executive Director, Director of Administration, Chief Operating Officer and similar designations. The term does not include branch office managers, regardless of title or department/functional specialist lead staff. There can be only one person in a law firm who qualifies as its principal administrator.

This unique idea exchange is open to the principal administrator in a law firm having, in all locations combined, 100 or more attorneys. Come with questions, concerns and solutions to discuss with your peers who are also managing large firms. You select the topics, which may include business planning, developing talent, lateral partner hiring and evaluating client profitability.

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## IPIE: Intellectual Property Idea Exchange

Sunday, April 2 1:00 PM - 2:15 PM

Join your fellow Intellectual Property (IP) administrators to discuss the unique issues to the IP administrator. Both new and experienced IP administrators are welcome to participate in this informal setting where you will share information, ideas and best practices. Participants are encouraged to bring topics of interest, questions and other issues to discuss.

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## CLIE: Chapter Leader Idea Exchange

Sunday, April 2 1:30 PM - 3:00 PM

This facilitated idea exchange is for current and prospective chapter leaders. Bring a success (or war) story and share!

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## HRIE: Human Resources Idea Exchange

Sunday, April 2 1:30 PM - 3:00 PM

Don't miss this chance to join firm administrators and human resource (HR) specialists in a lively discussion of the vital issues surrounding day-to-day HR solutions. Connect with your peers to discuss how HR managers and other department heads are thinking strategically to prepare for the future.

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## CLMIE: Certified Legal Manager Idea Exchange

Sunday, April 2 2:00 PM - 3:15 PM

Plan to pursue CLM certification? Just curious what it's all about? Bring your questions and get firsthand advice from experienced CLMs who will provide valuable tips on how to prepare for the certification exam. This is an ideal time for creating a network of support while preparing for the exam. You'll also hear how to develop focused study habits and overcome stumbling blocks during this interactive, informal exchange. In addition, members of the ALA Certification Committee will be available in the ALA booth to answer questions throughout the conference.

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## CP/GVIE: Corporate and Government Idea Exchange

Sunday, April 2 2:30 PM - 4:30 PM

Corporate and government law departments are entities that exist within larger organizations, and share many of the same challenges. Don't miss this great opportunity to meet fellow legal management professionals and discuss concerns, exchange thoughts and share best practices specific to operations in corporate and government law departments.

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## LFIE: Large Firm Administrator Idea Exchange (100+ Attorneys)

Sunday, April 2 3:15 PM - 4:30 PM

Plan to meet your fellow administrators in law firms with 100 or more lawyers to share best practices, pose questions on operational issues and discuss other matters specific to a large firm. Connect with peers, both old and new, and bring back a wealth of information and practical tips that you can implement immediately in your firm. Be sure to bring your questions and topics for discussion.

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## LWIIE: Leading with Inclusion Idea Exchange

Sunday, April 2 3:15 PM - 4:30 PM

Connect with colleagues and share challenges and successes around culturally competent leadership, unconscious bias, inclusion and diversity. Please join your peers to discuss strategies for promoting awareness, leading and advancing these important objectives in our workplaces.

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## MFIE: Medium Firm Idea Exchange

Sunday, April 2 3:15 PM - 4:30 PM

Don't miss this opportunity to meet your colleagues and brainstorm issues relevant to the unique challenges involved in managing the day-to-day responsibilities of the medium-sized firm of 31-99 attorneys. Come with questions, concerns and solutions to discuss with your peers. This is a great opportunity to connect with your colleagues, share ideas and discuss the topics relevant to the medium-sized firm.

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## SFIE: Small Firm Idea Exchange

Sunday, April 2 3:15 PM - 4:30 PM

Do you do it all in your firm of one to 30 attorneys? This idea exchange is for you! Join your peers to share ideas and issues relevant to running the business of the small firm. You will have an opportunity to determine the topics, which may include marketing, recruiting and small firm overhead.

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## INTIE: International Idea Exchange

Sunday, April 2 3:30 PM - 4:30 PM

This is the ideal place to meet administrators from around the world, connect with other international administrators and discuss the unique issues affecting your firms. U.S. administrators are also welcome to join this discussion. Discussion topics may include issues that are common to managing legal offices anywhere, as well as issues unique to your country.



## Education Monday, Apr. 3



CM10: Welcome and Keynote: The Manning Playbook for Leadership

Archie Manning

Monday, April 3 8:00 AM - 9:30 AM

Leadership is a concept that is more discussed than it is understood. What does it mean to be a leader in today's corporate world? Drawing on his years of NFL experience, Archie Manning takes his audience through the ups and downs of his career and shows what leadership looks like and why we need it today more than ever.

Objectives:

- Discover how to keep perspective and overcome obstacles.
- Examine how to learn from your failures.
- Illustrate how to use your experience to mentor and lead those around you.

60 Minutes

Audience: Basic

CLM App Management Category: Organizational Development

CLM App Management Category -FS: Human Resources Management

CPE Field of Study: Computer Science

CLE: Law Practice Management



## CM12: Leadership Is Not a Glass Slipper ... But You Still Have to Make Sure It Fits!

Monica Wofford

Monday, April 3 11:00 AM - Noon

Any person or personality can be a leader. But is it a fit for you? The same style of leadership, is not a fit for every candidate and many would even say the glamour of being a leader is not all it's cracked up to be. Leadership is Not a Glass Slipper™ is the session in which you'll easily see which style works for those you lead and the skills needed to lead even more effectively. Complete with 10 steps for individualized leadership development, this session helps you find your strengths and guides you to determine the right people who are the best fit for your team, practice and even among the attorneys who influence your office environment. Whether your leadership skills could improve in the area of communication, delegation, motivation, recognition or engagement of those you lead, this session clarifies which type of leadership "shoe" fits and whether you're the right person for it!

### Objectives:

- Identify key leadership actions that elevate effectiveness in communication and engagement.
- Apply identification tactics to vacancies, gaps and missing skills in your office.
- Determine, based on one's preference, whether being a leader is a role that truly and comfortably fits.

Audience: Attendees should have a working knowledge of leadership techniques in the legal industry. No advance preparation is required.

60 Minutes

Audience: Intermediate

CLM App Management Category: Organizational Development

CLM App Management Category -FS:

CPE Field of Study: Business Management & Organization

CLE: Law Practice Management



## FM10: How to Price for Profitable Legal Services and Build Client Relationships

Keith Lipman

Monday, April 3 11:00 AM - Noon

Pricing is the infrastructure of profitability and needs to be understood and accessible on the firm, practice, client, matter and attorney level. It's also the bedrock of building successful client relationships. With the pricing role at law firms evolving and maturing, the need for new, holistic technologies to support these roles is growing as well. In today's atmosphere, it's essential to have a core platform that connects law firm leadership and attorneys with their business development, pricing, finance and human resources teams — allowing the firm to work in a more integrated manner.

Objectives:

- Develop a deeper understanding of how pricing drives profitability and client relationships.
- Analyze how legacy technologies and new tech solutions enable firms to pursue ideal pricing strategies.
- Identify strategies for a comprehensive, holistic approach to complex pricing and legal project management challenges.

Audience: This session assumes that participants have a working knowledge of Legal Services Pricing.

60 Minutes

Audience: Intermediate

CLM App Management Category -FS: Financial Management

CPE Field of Study: Finance

CLE: Law Practice Management

Session Category: FM



OM11: Office 365 and the Cloud: What You Need to Know About Ethics and Security

James Gast David Myers

Monday, April 3 11:00 AM - Noon

Law technology is moving to the cloud at an incredible rate. Cloud and Office 365 adoption rates will continue to increase as the cost benefit is increasingly recognized. However, for law firms and their ownership, there are serious ethical, security and confidentiality considerations that need to be made prior to the leap into the cloud. Due diligence is a gray area for each firm and each state. We will explore the benefits of Office 365 and the cloud, and provide some tools to help legal management professionals evaluate if their firm should consider various cloud services.

Objectives:

- Evaluate various cloud services appropriate for law firms.
- Discuss and consider cloud ethical, security and confidentiality.
- Identify how to avoid common pitfalls when moving to the cloud.
- Review self-readiness tools and worksheets.

Audience: Attendees should have 7-10 years of Information governance and cyber security experience in the legal industry. No advanced preparation is required.

60 Minutes

Audience: Intermediate

CLM App Management Category: Information Technology

CLM App Management Category -FS: Operations Management

CPE Field of Study: Computer Science

CLE: Competence Issues

Session Category: OM



L110: Marketing on the Internet: A Perfect Marriage of Law, Business Development and Technology

Deborah McMurray

Monday, April 3 11:00 AM - 12:15 PM

How does a firm get noticed and compete with the tens of millions of posts on social media today? Where is the best money invested for the greatest return? Where do your business development goals fit in — and how do they drive your strategy and result in opportunity? This session will answer these questions and many more. You'll hear the results of Content Pilot's recent study, Global 50 Law Firm Websites: Ten Foundational Best Practices, receive practical advice about website strategy/design, hear tips on search engine optimization (SEO), and content best practices — all with the goal of winning your firm more profitable clients.

Objectives:

- Discuss how to build your next website with business development in mind, and how to plan the right strategy and budget.
- Break down how to write website and social media content that will turn the heads of human readers and search engine robots.
- Identify what the world's largest law firms are doing online.



- Identify how B2B buyers of legal services evaluate law firms online and the two buying stages they go through.

Audience: Attendees should have a working knowledge of digital marketing, technology and business development in the legal industry. No advance preparation is required.

75 Minutes

Audience: Intermediate

CLM App Management Category: Information Technology

CLM App Management Category -FS:

CPE Field of Study: Marketing

CLE: Law Practice Management

Session Category: LI



CM11: Business Writing Blitz: Tackling Grammar, Punctuation and Common Errors

Shannon Andrus

Monday, April 3 11:00 AM - 12:30 PM

This practical program provides an overview refresher of English grammar, punctuation and spelling, along with proofreading and composition tips and tricks. Delivered in fast-paced, "blitz" style, the workshop covers the most common and high-value errors, focusing only on the information you need to sharpen your writing and avoid mistakes.

Objectives:

- Examine how to use correct grammar and punctuation.
- Demonstrate how to write clear, complete sentences.
- Discuss how to adapt writing style to the appropriate audience and delivery media.
- Recognize frequently misused words.
- Describe ways to eliminate common errors.

Audience: Attendee at any level will benefit from this session. No advance participation is necessary.

90 Minutes

Audience: Basic

CLM App Management Category: Writing Skills

CLM App Management Category -FS:

CPE Field of Study: Communications

CLE: Substance Abuse



HR10: Connecting Business Goals to HR Metrics

Mark Robilliard

Monday, April 3 11:00 AM - 12:30 PM

Return on investment (ROI) is the classic business metric, but how does that relate to HR? We'll start with a surprising idea — the only two things happening in a law firm: value is being created and value is being destroyed. By first building a simple, but powerful model of how all business works, we'll engage in conversations about the business of law. With the fundamentals in place, we'll explore a range of useful metrics for HR practitioners. While we'll use an innovative system called Color Accounting to shine light on the numbers, it's as much a focus on using words that make the subject matter come to life and the session engaging for all types of learner.

Objectives:

- Breakdown financial statements in a way that makes them meaningful.
- Examine how your business generates and consumes value.
- Discuss HR specific metrics and link them to business goals.
- Identify financial-communication pitfalls.

Audience: Attendee at any level will benefit from this session. No advance participation is necessary.

90 Minutes

Audience: Basic

CLM App Management Category -FS: Human Resources Management

CPE Field of Study: Personnel/HR

CLE: Law Practice Management



HR11: Maximizing Your Firm's Success in Lateral Hiring

Alan R. Olson

Monday, April 3 11:00 AM - 12:30 PM

In today's legal market, the vast majority of law firms engage in lateral hiring of lawyers. Success varies across-the-board in terms of successful recruiting processes and, more importantly, in the success of laterals once hired. This session, directed at law firm and practice area leaders and managers, will provide strategies and tools to help your firm maximize its success in lateral recruitment and hiring. The presentation will include a strategic overview, guidelines on financial, performance and cultural issues, and pitfalls to avoid.

**Objectives:**

- Discuss strategizing and profiling the best candidates to meet your firm's needs.
- Identify which candidates are most likely to fit — and not fit — your firm's culture.
- Examine financial, performance and profitability parameters, and structures to implement.
- Discover ways to enabling new hires to hit the ground running, and shorten the firm's period for return on investment

**Audience:** Attendees should have a working knowledge of recruitment techniques in the legal industry. No advance preparation is required.

90 Minutes

**Audience:** Intermediate

CLM App Management Category -FS: Legal Industry/Business Management

CPE Field of Study: Personnel/HR

CLE: Law Practice Management



**L111: Burying the Billable Hour: Implementing Value Pricing in Your Firm**

Ron Baker

Monday, April 3 11:00 AM - 12:30 PM

Understanding how people make buying decisions is a key component to any successful pricing strategy. By grasping the concepts of how clients are influenced, you can be better equipped to price successfully and increase your profitability. This session will provide a look at behavioral economics, marketing strategy and customer psychology, as well as how these principles should be applied to pricing. This session will confront the conventional wisdom embodied in the old law firm business model, which states the way to success is by leveraging people and hours, or "we" sell time.

**Objectives:**

- \* Recognize the first and second law of pricing and how they influence your pricing decisions.
- \* Discover how the anchoring and framing effects influence pricing.
- \* Analyze what and how people buy.

- \* Discuss the importance of price psychology and emotions.
- \* Identify why your firm should offer pricing options, rather than one price.

Audience: This session assumes that participants have a working knowledge of pricing in the legal industry.

90 Minutes

Audience: Basic

CLM App Management Category -FS: Legal Industry/Business Management

CPE Field of Study: Finance

CLE: Law Practice Management



OM10: Building Information Risk Management into Your IT Security Program

Al Marcella Jr.

Monday, April 3 11:00 AM - 12:30 PM

In today's global economy, organizations critically depend upon information technology (IT) systems to process their information for better support of their mission. Risk management plays a critical role in protecting an organization's information assets — and therefore its mission — from IT-related risk. An effective risk management process is an important component of a successful IT security program and should be treated as an essential management function of the organization.

Objectives:

- Identify threats, vulnerabilities and exposures to organizational data and information assets.
- Analyze various risk methodologies and assess application to individual enterprise environments.
- Explain and utilize risk assessment and analysis methodologies.
- Assess information security controls and countermeasures and their effectiveness.
- Develop risk mitigation strategies for critical organizational information resources.

Audience: This session assumes that participants have a working knowledge of risk management operations in the legal industry.

90 Minutes

Audience: Intermediate

CLM App Management Category -FS: Operations Management

CPE Field of Study: Management Advisory Services

CLE: Law Practice Management

Session Category: OM



### FM11: Administering Your Firm's Retirement Plan in a Changing Environment

Virginia Brennan

Monday, April 3 1:45 PM - 2:45 PM

New fiduciary rules brought about by the U.S. Department of Labor are expected to result in significant changes in the way retirement plans and related investment advisory services are delivered to individuals. Starting in 2017, these changes may impact the way plan sponsors interact with advisory firms and consultants. Legal management professionals should be aware of these changes and know how they may impact the way retirement plans are administered.

Objectives:

- Review the basics of the new rules being introduced by the U.S. Department of Labor.
- Identify how these rules may impact the way your firm's retirement plan is administered.
- Determine key best practices on how to administer your firm's retirement plan.

Audience Statement: This session assumes that participants have a working knowledge of federal fiduciary rules and retirement plans.

60 Minutes

Audience: Intermediate

CLM App Management Category -FS: Financial Management

CPE Field of Study: Finance

CLE: Legal Ethics



### L113: Who Should Care About Legal Conflicts of Interest?

Jennifer Buhler

Monday, April 3 1:45 PM - 2:45 PM

In this program, attendees will learn why every legal management professional, regardless of the size of the firm, must understand the ramifications of conflicts of interest. The program will include an overview of how conflicts of interest are created, why you must search for conflicts for every new

matter and lateral hire (lawyers and non-lawyers), and how you can make your conflicts system work for your firm. The presentation will also include examples of what can happen if firms fail to spot a conflict of interest.

Objectives:

- Discuss how conflicts of interest are created under Rule 1.7, 1.8 and 1.9.
- Explain why it is important to search for conflicts of interest for all lateral hires, including staff.
- Summarize solutions for how to better structure your database to find and solve conflicts of interest.
- Describe examples of how a conflict of interest can cost a firm money and harm a firm's reputation.

Audience: This session assumes that participants have a working knowledge of legal project management in the legal industry.

60 Minutes

Audience: Intermediate

CLM App Management Category -FS: Legal Industry/Business Management

CPE Field of Study: Behavioral Ethics

CLE: Legal Ethics



HR13: Examining the HR Trends That Are Shaping Law Firms for the Future

Lori Kleiman

Monday, April 3 1:45 PM - 3:00 PM

You need top talent, and savvy firms watch what they need in HR to be competitive. Law firms have to take a fresh look at what is trending in HR departments, employee engagement and retention techniques, and general human resources best practices. As a leader, embracing the business megatrends that impact your employees and HR in general is essential. In this interactive session, you will learn how you can implement initiatives in your firm to prepare human capital for the ever-changing operations of business. These initiatives include working with remote employees, retention, trends in performance management, the role of social media and your website in recruiting, evaluating aspects like pay policy, and training to change skills and behaviors. Don't miss this opportunity to get ahead of the curve and bring the latest action-oriented HR solutions back to your organization.

Objectives:

- Identify the HR megatrends transpiring in business that keep your management team up at night.
- Develop long-term initiatives that are grounded in the best interest of your employees making an impact on the firm.

- Analyze resources that will address the human resource trends.
- Determine which HR initiatives in your firm today will take you into the future, and which need to be updated.

Audience: This session assumes that participants have a working knowledge of human resource management and employee benefit plans.

75 Minutes

Audience: Intermediate

CLM App Management Category -FS: Human Resources Management

CPE Field of Study: Personnel/HR

CLE: Law Practice Management



LI12: Generational Marketing: Strategies and Tactics for Engaging Different Generations

Jonathan Fitzgarrald Heather Morse

Monday, April 3 1:45 PM - 3:00 PM

The business landscape is now composed of four distinct generations of purchasers and providers of legal services. Successful legal professionals understand each generation has its own distinct preferences, incentives, skill sets and ways they receive and process information. This interactive program will provide insights into the four generations, and how law firms can construct and tailor messages both internal and external so messages are heard by target audiences. Additionally, the discussion will explore the coming tide of Gen X leaders, who are characterized by their independence, individualism, resilience, self-reliance, adaptability and an entrepreneurial spirit. The program also dives into how law firms can better attract and retain Millennial attorneys.

Objectives:

- Discover how the generations can come together in a collaborative setting to best work together.
- Describe the different motivations of each generation, and what law firm leaders can do to overcome many of the current hurdles to collaboration.
- Review up-to-date information on the current status of the generational divide.
- Discuss tactics to motivate and lead in this ever changing legal environment.

Audience: Attendees should have a 7-10 years of business development knowledge in the legal industry. No advance preparation is required.

75 Minutes

Audience: Advanced

CLM App Management Category -FS: Legal Industry/Business Management

CPE Field of Study: Business Management & Organization

CLE: Law Practice Management



CM13: Business Writing: Digital Communication

Shannon Andrus

Monday, April 3 1:45 PM - 3:15 PM

This practical program focuses on communicating clearly and appropriately through email and includes an overview of effectively using social media in the professional world.

Objectives:

- Distinguish the different rules that apply to email communication versus traditional business documents.
- Demonstrate how to write clear, complete, effective emails.
- Breakdown how to adapt writing style to the appropriate audience and delivery media.
- Summarize the "rules of engagement" for social media communication in the business world.

Audience: This session assumes that participants have a working knowledge of effective business writing. No advance preparation is required.

90 Minutes

Audience: Intermediate

CLM App Management Category: Writing Skills

CLM App Management Category -FS:

CPE Field of Study: Communications

CLE: Law Practice Management



CM14: Old School, New School: Engaging, Retaining, and Managing Change in a Multigenerational Workplace

Lora Haines



Monday, April 3 1:45 PM - 3:15 PM

In 2015, Millennials officially outnumbered boomers in the workplace. They are shaking it up and trumping some tried-and-true management practices, and resistance from older generations is bursting at the seams. They're also tough to retain! Navigating this change management scenario will not be business as usual. In this session, attendees will learn four essential rules for managing the "Millennial movement." This presentation is packed with real life examples from companies who are winning with Millennials. You'll examine the changes through the lens of a Millennial and Baby Boomer to illustrate what to expect on this rocky road.

Objectives:

- Discover ways to motivate and inspire millennials to achieve superior job performance.
- Create a work environment that is structured, but empowering.
- Recognize the stages of change and manage the situation purposefully.
- Describe ways to overcome resistance and manage difficult situations effectively and directly.
- Identify ways to encourage and provide constant and open communication to build trust among every generation.

Audience: This session assumes that participants have 10 years of experience and/or advanced degree in field of study

90 Minutes

Audience: Advanced

CLM App Management Category: Organizational Development

CLM App Management Category -FS:

CPE Field of Study: Communications

CLE: Law Practice Management



HR12: Replacing the Annual Performance Appraisal Ritual

Ron Baker

Monday, April 3 1:45 PM - 3:15 PM

Most organizations and employees are dissatisfied with the performance appraisal process, so it remains a curiosity why this methodology continues to exist. Performance appraisals don't drive careers; they are an incidental effect of other dynamic systems. In essence, appraisals are the paper-shuffling ritual that sanctifies decisions already made. A few professional firms have replaced this annual process, including Deloitte and Accenture.

Objectives:

- Relate why it's a legal myth that performance appraisals protect you from litigation, or in court.
- Analyze why appraisals instinctively focus on weaknesses, not strengths.
- Outline why once a year is too long to evaluate and provide feedback to knowledge workers.
- Summarize effective replacements to the annual performance appraisal.

Audience: This session assumes that participants have a working knowledge of performance appraisals in the legal industry.

90 Minutes

Audience: Intermediate

CLM App Management Category -FS: Human Resources Management

CPE Field of Study: Personnel/HR

CLE: Law Practice Management



OM12: Establishing and Maintaining a Proactive, Privacy-Compliant Firm

Al Marcella Jr.

Monday, April 3 1:45 PM - 3:15 PM

Issues of both national and individual security and safety continue to dominate the strategic decisions and activities of citizens, government officials and corporate strategic planners. The need for more access to personal information, the potential of population "digital DNA" profiling and the surrender of greater amounts of personal privacy are increasingly likely. What are the impacts legally, financially and personally as the possibility of laying bare once coveted private information, is no longer considered or treated as private?

Objectives:

- Identify potential sources of risk that would affect client/firm privacy (e.g., data, voice, video, written communications, etc.).
- Assess data collection, classification and sharing practices.
- Recognize ways to reduce risk from a privacy breach.
- Explain on-going audit strategies for privacy compliance.
- Examine the five W's of a Privacy Impact Assessment

Audience: This session assumes that participants have a working knowledge of privacy and compliance regulations in the legal industry.

90 Minutes

Audience: Intermediate

CLM App Management Category -FS: Operations Management

CPE Field of Study: Administrative Practice

CLE: Law Practice Management



OM13: Advanced Excel Tips and Tricks

Ivan L. Hemmans

Monday, April 3 1:45 PM - 3:15 PM

Learn how to take Excel spreadsheet solutions to the next level of productivity. Attendees are guided through intermediate and advanced techniques for using Excel to increase the types of financial data they can produce in the legal setting.

Objectives:

- Explain the "lookup" feature and how to find values in lists.
- Discuss how to distribute delimited data across cells.
- Demonstrate how to group, filter and total large lists of data.
- Outline how to set up reliable data validation.

Audience: This session assumes that participants have 10 years of experience and/or advanced degree in field of study. Attendees should have advanced knowledge of spreadsheet applications.

90 Minutes

Audience: Advanced

CLM App Management Category: Information Technology

CLM App Management Category -FS: Operations Management

CPE Field of Study: Computer Science

CLE: Law Practice Management



L116: Essential Sales Lessons that Law Firms Need to Know from Corporate Legal Department Leaders

Oliver Yandle Connie Brenton Jeffrey Franke Tracey Gallegos Carrie Powicki

Monday, April 3 1:45 PM - 3:15 PM

Do you know what corporate legal departments are looking for when they are procuring legal services? Do you know what they are missing from their current law firm vendors regarding technology — technology that could potentially cost your firm their business? Members of the Corporate Legal Operations Consortium (CLOC) know and are ready to share their knowledge with you. CLOC is made up of legal operations professionals who are the individuals responsible for procuring legal services and overseeing daily in-house corporate operations. This panel session will be made up of CLOC members who are experts in their field. It will address key challenges and opportunities that buying and selling legal services creates — from relationship building and management, to financial and strategic decision-making. If you are seeking a win-win approach that encourages communication and collaboration between professional buyers and sellers of legal services, you should attend this session to discover what CLOC members want and need from their law firm vendors.

Objectives:

- Discuss why corporate legal department leaders chose their legal service providers.
- Explain why corporate legal department leaders keep their legal service providers.
- Describe why corporate legal department leaders do not keep legal service providers.
- Identify ways to build strong relationships between corporate legal department leaders and legal service providers.
- Discover the best tools to be used for measuring AFAs.

Audience Statement: This session assumes that participants have a working knowledge of corporate legal departments and legal service providers.

- 90 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Legal Industry/Business Management
- CLE: Law Practice Management



FM12: Do You Know What Your 401(k) Is Costing You and Your Firm?

Virginia Brennan

Monday, April 3 4:00 PM - 5:00 PM

Do you know how fees affect your firm's 401(k)? As the administrator of your plan, you should have a good understanding of the costs associated with your retirement plan, which can include costs to your firm as well as costs to your individual employees. There are several types of fees a retirement plan provider can use to collect revenue. All of these fees can quickly add up to thousands of dollars, which

can erode the profits of your law firm and negatively impact an employee's retirement savings. In this presentation, we will discuss why fees are important and review the types of fees that are often included in retirement plans. We will also talk about the role of the fiduciary and making appropriate decisions with fee information as part of that responsibility.

Objectives:

- Identify various fees and how they are applied to plans and participants.
- Outline how to make value judgments based on the relationship between fees and services.
- Discover how expense ratios directly impact savings.

Audience Statement: This session assumes that participants have a working knowledge of federal fiduciary rules and retirement plans.

60 Minutes

Audience: Intermediate

CLM App Management Category -FS: Financial Management

CPE Field of Study: Finance

CLE: Law Practice Management



OM14: The Less Paper Law Firm: A Case Study

John Gilbert Carolyn Smallwood

Monday, April 3 4:00 PM - 5:00 PM

Today's law firms and legal departments understand that reducing the amount of paper in their office can have substantial benefits. Through less-paper initiatives, legal operations of all sizes can create efficient workflows, enable remote access, reduce on-site storage footprint and realize savings from phasing out all offsite storage. This case study will review how to successfully implement a less-paper initiative utilizing all-digital document retention supported by state-of-the-art scanning and routing technology.

Objectives:

- Explain the value of a scanning program.
- Determine the expected ROI for a law firm or legal department.
- Review tips, tricks and process improvements from planning to implementation.
- Evaluate tactics for overcoming the recalcitrance of attorneys and staff alike.

Audience: Attendee at any level will benefit from this session. No advance participation is necessary.

60 Minutes

Audience: Basic

CLM App Management Category -FS: Operations Management

CPE Field of Study: Production

CLE: Law Practice Management



HR15: Federal Labor and Employment Law Compliance Under the New Administration: Are You Prepared?

Todd Fredrickson

Monday, April 3 4:00 PM - 5:15 PM

This session will cover emerging issues under federal labor and employment law under the new presidential administration, including Title VII, the Fair Labor Standards Act, the Equal Pay Act and other laws. You'll learn about the evolving enforcement agendas of such agencies as the Equal Employment Opportunity Commission and U.S. Department of Labor. Additionally, you'll obtain practical advice on responding effectively when these agencies investigate or audit discrimination or harassment issues, exempt versus non-exempt status, and like issues.

Objectives:

- Describe how to set up your office for success to avoid trouble spots under these laws.
- Assess risk or exposure when dealing with new laws or issues
- Identify employer rights and responsibilities upon receipt of a complaint, charge or audit notice.

Audience: This session assumes that participants have ten years of federal labor and employment law experience.

75 Minutes

Audience: Advanced

CLM App Management Category -FS: Human Resources Management

CPE Field of Study: Personnel/HR

CLE: Law Practice Management



L115: Leading with Strategy

Steve D. Wingert

Monday, April 3 4:00 PM - 5:15 PM

Strategic planning is an essential tool law firms and legal departments must have as a competitive road map to the future. Yet, there are generally three camps when it comes to the strategic planning: 1) Those who develop thoughtful, focused goals and execute and measure results; 2) Those who develop a plan because they think they should, yet fail to execute the plan in a systematic way with desired results; and 3) Those who simply hope for the best. So why is strategic planning such a chore for so many, with such mixed results? What role does leadership in your organization play in strategic thinking, strategic management and strategic change? How does a leader driven approach impact the development, execution, measurement and success of a strategic focus? This session will provide insights into the leaders' role in strategy and change.

Objectives:

- Identify components of strategic leadership and planning.
- Define the components of a strategic plan and the relevance of each.
- Formulate the role leaders' play in the strategic thinking and management process, and characteristics key to their success.
- Discuss the role change management plays in execution of a strategic plan.
- Examine steps for accountability and success of the plan.

Audience: This session assumes that participants have a working knowledge of strategic planning in a legal setting. No advance preparation is required.

75 Minutes

Audience: Intermediate

CLM App Management Category -FS: Legal Industry/Business Management

CPE Field of Study: Management Advisory Services

CLE: Law Practice Management



CM15: Make Difficult People Disappear: How to Eliminate Conflict and Reduce Stress in the Workplace

Monica Wofford

Monday, April 3 4:00 PM - 5:30 PM

We all have them, but no one wants to deal with them. But what you really want to know is how to Make Difficult People Disappear™ ... without going to jail! In this high-energy session, attendees complete a personality quiz and apply their emotional intelligence to difficult bosses, employees and even family members. Appropriate for audiences of all positions, the lessons from this topic foster

collaboration among office managers and the teams they lead — as well as the attorneys and administrators who lead them — while eliminating daily stress and conflict that can come from clients and others.

Objectives:

- Develop and retain a unique awareness of the four personalities you work with, report to, collaborate with, and sometimes struggle working with.
- Practice immediately applicable methods for improving your daily communication and prevention of conflict among colleagues.
- Evaluate your role in a difficult relationship and find the humor in how we unknowingly help others be difficult or see us as difficult.
- Identify three scenarios in which the course skills can be applied and practice their solutions in session.

Audience: Attendees of all levels will benefit from this session. No advance preparation is required.

90 Minutes

Audience: Basic

CLM App Management Category: Organizational Development

CLM App Management Category -FS:

CPE Field of Study: Communications

CLE: Law Practice Management



CM16: Law is a Buyer's Market: Transforming Law Firms to Respond to a New Competitive Environment

Jordon Furlong

Monday, April 3 4:00 PM - 5:30 PM

Law firms have experienced a wrenching decade of upheaval. Economic crisis, technology revolutions and an army of innovative competitors have created a new marketplace for legal services. Empowered clients are sending less work to law firms and dictating new terms of their relationships with outside counsel, turning law into a buyer's market. Law firms need effective solutions to these existential challenges, and fast. This session will outline those solutions and recommend practical routes by which law firms can achieve them.

Objectives:

- Describe the underlying causes of legal market transformation and the new competitive landscape for legal services.
- Identify the key features of a buyer-focused law firm that can thrive in this new environment.



- Explain essential leadership and change management techniques that law firms will require to undertake this transformative process. Audience Level: Intermediate

Audience: This session assumes that participants have 7-10 years of change management and client service experience in the legal industry.

90 Minutes

Audience: Advanced

CLM App Management Category -FS:

CPE Field of Study: Business Management & Organization

CLE: Competence Issues



HR14: Building Effective Mentoring Programs

Rik Nemanick

Monday, April 3 4:00 PM - 5:30 PM

One of the best ways to help develop and retain your valued employees is by having them work with a skilled mentor. Many firms have created programs to facilitate the creation of mentoring partnerships, but the programs have not always delivered the desired results, leading to frustration of both mentees and mentors. However, mentoring programs can deliver great results if they are designed well from the start. This session will examine current research on mentoring programs and will detail how firms can get the most out of them.

Objectives:

- Describe how firms can benefit from facilitated mentoring programs.
- Identify what structure to create for an effective program.
- Explain what should be covered in mentor and protégé training.
- Summarize how to evaluate the program for success.

Audience: This session assumes that participants have a working knowledge of human resource needs and procedures in a legal setting. No advance preparation is required.

90 Minutes

Audience: Intermediate

CLM App Management Category -FS: Human Resources Management

CPE Field of Study: Personnel/HR

CLE: Law Practice Management



#### L114: Doubling Your Practice Through Productization

Mark Maraia

Monday, April 3 4:00 PM - 5:30 PM

This interactive session will make the business case for lawyers productizing their services, no matter the firm size. Using client case studies from small firms to larger ones, you'll learn how to rethink and present your services as products at multiple price points — making it easier for the buyer of the services to hire you. In the process, your client will enjoy greater perceived value in working with you.

#### Objectives:

- Explain ways to better understand the client's perception of value.
- Discuss why "thinking like a rainmaker" requires C-suite thinking skills.
- Illustrate why productization is more profitable than hourly billing.
- Discover why productization is better than commoditization.

Audience: This session assumes that participants have 10 years of experience and/or advanced degree in field of study

90 Minutes

Audience: Advanced

CLM App Management Category -FS: Legal Industry/Business Management

CPE Field of Study: Management Advisory Services

CLE: Law Practice Management



#### OM15: Disaster Planning and Recovery: Lesson from the Trenches

Ernie Condra

Monday, April 3 4:00 PM - 5:30 PM

Attendees will hear from the executive director of a large law firm that suffered windstorm damage. The result was a destroyed a headquarters office. They will learn about how planning was or was not well conceived, and about the myriad of details required to remain functioning, recover in temporary spaces

and rebuild an entire 50,000-square-foot office. This knowledge will position them dramatically better when considering similar potential catastrophes in their firms.

**Objectives:**

- Analyze your current state of planning for a disaster and how it may or may not be effective.
- Examine the nuances of how even good planning can be short circuited.
- Identify tips and tricks for remaining functional under disaster conditions.
- Outline how communications play a pivotal role in recovery.

**Audience:** This session assumes that participants have 10 years of experience and/or advanced degree in field of study

90 Minutes

**Audience:** Advanced

CLM App Management Category -FS: Operations Management

CPE Field of Study: Business Management & Organization

CLE: Law Practice Management

**Session Code Key**

CM – Communications & Organizational Management

FM – Financial Management

HR – Human Resources Management

LI – Legal Industry/Business Management

OM – Operations Management



## Education Tuesday, April 4



FM20: Time Entry to Cash Receipts...8 Steps to Increase Revenue & Partner Profits

Jay Erdman

Tuesday, April 4 7:30 AM - 8:30 AM

Our experience has found that the key to Law Firm Profitability is more easily achieved by raising revenue than trimming expenses. This presentation involves a basic to intermediate overview of specific areas (from Time Entry to Cash Receipts) for increasing revenue and Partners' profits. It will focus on the various factors that influence enhancing revenue objectives and presents ideas and methodologies to the attendees that they might employ to achieve their desired goals.

Objectives:

- Evaluate Partner's profits calculations impacted by various levels of revenue enhancements
- Identify various strategies to increase Firm's revenue, including:

Capturing more time

Improving Resource Management

Closing the Realization Gap

- Discuss methods to assess and improve the management of Unbilled Time, Unbilled Cost and Accounts Receivable

Audience Level: Intermediate

This session assumes that participants have a working knowledge time entry and cash receipts.

60 Minutes

Audience: Intermediate

CLM App Management Category -FS: Financial Management

CPE Field of Study: Finance

CLE: Law Practice Management



FM21: Working against the Margin: Cost Recovery in the New Legal Marketplace

Robert Mattern

Tuesday, April 4 7:30 AM - 8:30 AM

Law firms now face new challenges: a growing global market, flat domestic demand, increasing client pushback, competition from non-legal sources and an increase in outsourcing. Firms now work against the margin. Their success is dependent upon their ability to strategically recover costs. In this session, we'll examine the results from the 2016 Mattern & Associates Cost Recovery Survey, including strategies from firms that are proactive about maintaining this expense recovery stream and adjusting their strategy to the current workplace — and those that are letting this revenue slip away. We'll discuss new, critical areas and trends in legal research, litigation support and e-discovery managed services from which attendees can leverage ready-to-implement benchmark takeaways.

Objectives:

- Develop an understanding of the new challenges facing law firms in 2016, and how strategic cost recovery plays a role in meeting these challenges.
- Describe the elements of effective cost recovery by comparing strategies from firms that are recovering costs effectively and firms that struggle to do so.
- Identify new critical areas and trends in cost recovery that firms can use to manage costs and drive profitability.

Audience: This session assumes that participants have a working knowledge of cost recovery and financial management in the legal industry. No advance preparation is required.

60 Minutes

Audience: Intermediate

CLM App Management Category -FS: Financial Management

CPE Field of Study: Finance

CLE: Law Practice Management



## LI21: Information Governance: How to Implement Need-to-Know Access and Ethical Walls without Destroying Productivity

Ben Weinberger

Tuesday, April 4 7:30 AM - 8:30 AM

Lawyers have an ethical obligation to protect the client confidentiality. The Panama Papers served as a wake-up. Clients are now telling firms to limit access to their information to only those who are working on their matters. Given the risk of data breach and the damage to firm and client reputations as well as the threat of fines from regulatory agencies, firms can no longer accept the risk that comes with open-access security models. Firms must now compartmentalize data and limit access without creating new workflow problems or risk management policy violations. This session will include an overview of why clients are driving the need-to-know policies, how this shift is being handled (or mishandled) by various firms, and what is needed to make the transition seamless, effective and demonstrably secure.

### Objectives:

- Describe ways to maintain ethical walls to protect client confidentiality.
- Analyze how and why clients and regulatory agencies are driving the shift from open access to limited information access ("need to know" security).
- Discuss how firms can address this change on an organizational level and across which specific systems, while maintaining optimal workflow and risk management.
- Breakdown both technological and operational solutions and how they can be deployed simultaneously to resolve issues.

Audience: Attendees should have a working knowledge of ethical practices in the legal industry. No advance preparation is required.

60 Minutes

Audience: Intermediate

CLM App Management Category -FS: Legal Industry/Business Management

CPE Field of Study: Behavioral Ethics

CLE: Law Practice Management



CM20: The Happy Hour Effect: 5 Key Commitments to Elevate Your Personal and Professional Success

Kristen Brown

Tuesday, April 4 7:30 AM - 8:45 AM

Stress negatively affects our lives professionally and personally, and the legal profession is no exception. It's estimated that 80 percent of people say their job is the most stressful aspect of their lives. Furthermore, 1 million people are calling in sick to work every day due to stress — to mention those who show up but are unproductive, unfocused or even actively sabotaging their teams. By understanding the dynamics of stress and how it impacts you and your team, you can better manage it so it doesn't stop you from being successful in your career and personal goals. This session will discuss the Happy Hour Effect framework and how it can help reprioritize the dynamics of your life with clarity, and offer fresh action for work/life happiness, health, career success and stronger relationships.

Objectives:

- Recognize why and how stress impacts your personal and professional success at work and home.
- Create a customized Life Map to help change your mindset around work/life balance.
- Discover your stress cues and stress cures so you can better prepare for and manage the elements of your life that cause anxiety, while boosting the areas that bring you energy and happiness.

Audience: Attendee at any level will benefit from this session. No advance participation is necessary.

75 Minutes

Audience: Basic

CLM App Management Category: Self-Management Skills

CLM App Management Category -FS:

CPE Field of Study: Personal Development

CLE: Law Practice Management



HR20: The Potential Implications of “Trumpcare”

Karen L. Kirkpatrick

Tuesday, April 4 7:30 AM - 8:45 AM

This label has yet to find its way into any proposed bills or even signed legislation. However, 2017 promises to bring vast change in health care, including its delivery, access and cost. This session will explore the myriad of options that this administration has to better the health care landscape, while reducing costs, increasing access and participation on all fronts. We also will outline all the initiatives that have taken place, including what bills have been proposed and/or passed, what legislation has been left alone, and what may be still to come.

**Objectives:**

- Discuss how to gain a higher level of comfort in what they know and how to manage it within the firm.
- Explain what effective dates and changes employers will need to address in 2017 and what is potentially coming in 2018.
- Prepare messaging to staff.

Audience: This session assumes that participants have a working knowledge of human resource management and employee benefit and health plans.

- 75 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Human Resources Management
- CPE Field of Study: Personnel/HR
- CLE: Law Practice Management



L120: Social Media, Digital Marketing Mechanics and More

Audrey Ehrhardt

Tuesday, April 4 7:30 AM - 8:45 AM

You have social media. You have a website. You support both with content, such as blogs. But what is all of it really doing for you? In this session, we are going to take a look behind the curtain of your law practice's strategic marketing plan to discuss your website foundation, together with the seven digital marketing strategies you need to get your law firm ranked on Google's first page. From SEO (search engine optimization) and the Google suite (including Google analytics/webmaster tools, Maps and AdWords) to publishing platforms, small search engine maximization, and reporting and conversion, we will dive deep into what your strategy should look like, along with best practices for getting where you want to go with your integrated digital marketing.

**Objectives:**

- Identify the six key digital platforms for lawyers and evaluate the lawyers' presence related to marketplace saturation in each.
- Discuss the elements of a comprehensive, multiplatform digital strategy.



- Describe the digital marketing mechanics and tools that are important for firms that want to raise their digital rankings.
- Examine real-world examples of these mechanics and tools for a better understanding of how to use them.

**Audience Level:** Advanced



**HR21: A Transgender Experience: A Personal Account**

Ret. Lt. Rachel Esters

Tuesday, April 4 7:30 AM - 9:00 AM

This presentation includes an eye level view of what gender transition consists of, including male and female perspectives. The attendees are able to experience a subject that has become more visible nationally, in both our communities and the workplace. The presentations' goal is not limited to only transgender issues, but by the nature of the topic, participants are able to have a better perspective of the challenges that women and minorities experience at work. This unique perspective will assist your organization in understanding the needs of transgender employees and provide an understanding environment. This presentation is designed to be a departure from standard training sessions by incorporating emotional experiences with a focus on discussion.

**Objectives:**

- Discuss the speaker's gender transition, with the inclusion of personal stories.
- Identify and discuss challenges in the office.
- Analyze the physical and emotional aspects of the transition process. Audience Level: Intermediate

**Audience:** This session assumes that participants have a working knowledge of human resource needs and procedures in a legal setting. No advance preparation is required.

90 Minutes

Audience: Intermediate

CLM App Management Category -FS:

CPE Field of Study: Personnel/HR

CLE: Law Practice Management



## OM20: Hacking: The Threat from Within

Pamela Blank Woodruff Rob Kleeger

Tuesday, April 4 7:30 AM - 9:00 AM

Law firm management and risk managers have been focusing on the threats of outside hackers, malicious source code attacks and the everyday digital threats that could disrupt business. But there is one weak link that they also need to focus on — people. Whether disgruntled or dishonest, whether destroying records or stealing intellectual property, it is shockingly easy for insiders to wreak havoc on your most valuable digital assets. Unprotected data can leave your office on a thumb drive, a laptop or through a personal email account. Once outside, there are plenty of lively markets for it. From competitors looking for trade secrets, to criminals stealing customer data, to rogue states breaching national security and much more, there is no shortage of buyers for any information that can be monetized. Before you can begin to build your defense, you need to know what you must protect.

### Objectives:

- Identify the risks within the law firm environment.
- Discuss practical tips on how to better secure and monitor sensitive data.
- Examine surveys and facts to support the trends.
- Analyze interactive hypotheticals.

**Audience:** This session assumes that participants have a working knowledge of cyber security and risk management in the legal industry.

90 Minutes

**Audience:** Intermediate

CLM App Management Category: Information Technology

CLM App Management Category -FS: Operations Management

CPE Field of Study: Computer Science

CLE: Law Practice Management



## OM21: Operational Excellence: Legal Process Improvement Applied to Business and Administrative Functions

Karen Dunn Skinner David Skinner

Tuesday, April 4 7:30 AM - 9:00 AM

Today's legal market demands a new approach to operational excellence. There is increasing pressure on the business and administrative professionals whose work is at the foundation of every law practice to deliver better quality service in less time and at less cost. Lean Six Sigma's framework for process improvement is based in fact, logic, and common sense and is a powerful methodology that will drive operational excellence through increased efficiency and productivity, leading to greater competitiveness and sustainable profitability. This interactive session is designed specifically for those responsible for championing innovation through process optimization or for sponsoring or leading process improvement teams. You'll learn about some of the fundamental tools and methodologies you can use immediately to identify, evaluate, and eliminate waste in every aspect of your firm's operations.

Objectives:

- Demonstrate how implementing Lean can increase operational excellence through improved productivity, profitability, and client service across all aspects of an organization.
- Breakdown how the DMAIC (Define, Measure, Analyze, Improve, and Control) approach can lead to successfully implementing improvements.
- Identify value and waste in the business and administrative processes that support the practice of law.
- Discuss why process optimization is the foundation of successful legal project management systems.

Audience: This session assumes that participants have a working knowledge of legal process improvement in the legal industry.

90 Minutes

Audience: Intermediate

CLM App Management Category -FS: Operations Management

CPE Field of Study: Business Management & Organization

CLE: Law Practice Management



FM22: Client Profitability: Analysis to Action

Brian Kennel

Tuesday, April 4 9:45 AM - 11:15 AM

Client profitability is a tether to reality. In this session, we will review the most reliable methods for computing client/matter profitability. We will examine the more common methods for allocating overhead, including an analysis of direct and indirect costs. The second part of this session will include a discussion of the various uses of client profitability data in compensation, client pricing, alternative fee

agreements, workload distributions and overhead control. We'll also consider the various pitfalls to avoid, and address methods to overcome partner fears about calculating client profitability for the first time. Finally, we'll include an overview of the competitive advantages this type of data affords to a firm when recruiting laterals and groups.

#### Objectives

- Recognize the benefits of client/matter profitability analysis.
- Explain the process for creating a credible profitability analysis.
- Identify the various uses of client profitability.
- Create an action plan for developing a workable client profitability report system.

Audience: This session assumes that participants have a working knowledge of Law firm financial management practices.

90 Minutes

Audience: Intermediate

CLM App Management Category -FS: Financial Management

CPE Field of Study: Management Advisory Services

CLE: Law Practice Management



CM21: The Realist's Guide™ to Getting a Grip on Negativity

Craig Price

Tuesday, April 4 10:15 AM - 11:15 AM

Understanding its usefulness and value is a major key to successful effective teams. With this innovative, entertaining program Craig Price takes a realistic, humorous look at traditionally "negative" issues. By looking at the hidden value in complainers, criticism and failure, Craig will give tools to not only limit the occurrence of these difficulties, he'll have you looking at these "problems" in a whole new light.

#### Objectives:

- Learn how to create effective teams by understanding the negativity of others.
- Get techniques to respond effectively to negative employees.
- Understand the power of saying "no" as leader and team member.
- Recognize how to delegate responsibly.

Audience: This session assumes that participants have a working knowledge of communication styles and organizational development in a legal setting. No advance preparation is required.

60 Minutes

Audience: Intermediate

CLM App Management Category: Organizational Development

CLM App Management Category -FS:

CPE Field of Study: Business Management & Organization

CLE: Law Practice Management



CM22: Strength-Based Leadership: The 10-80-10 Principle

Sunjay Nath

Tuesday, April 4 10:15 AM - 11:15 AM

The 10-80-10 Principle is a framework that allows you to increase your performance and results by focusing your energy and efforts on highest yielding activities. It helps individuals and teams operate at a dynamic level. Every person or group already exhibits behaviors that are top 10 (percent) — those behaviors that lead to high performance and achievement. What people lack is the knowledge and a framework to consistently operate at that dynamic, top 10 level. The 10-80-10 Principle program provides a methodology to reward and grow top 10 behaviors and neutralize bottom 10 actions. Attendees will identify their top and bottom 10 and, using the 10-80-10 Principle, they'll create greater performance levels in both their personal and professional lives.

Objectives:

- Discover how to save time by focusing on the right activities.
- Outline how to increase team cohesion by increasing output with fewer resources.
- Create a healthier organization culture by cultivating and training toward team members' strengths, which increases job satisfaction and reduces turnover.

Audience: This session assumes that participants have a working knowledge of leadership techniques in the legal industry. No advance preparation is required

60 Minutes

Audience: Intermediate

CLM App Management Category: Organizational Development

CLM App Management Category -FS:

CPE Field of Study: Business Management & Organization

CLE: Law Practice Management



FM23: Tips for Significantly Reducing Firm Travel Costs

Michael Steiner Stephen Dempsey R.J. Filipski Patrick Guilfoyle Scott Jordan

Tuesday, April 4 10:15 AM - 11:15 AM

Typically, the second largest expense for a law firm is travel. Traveling attorneys have different special needs compared to other business travelers. Their plans are constantly changing — 80 percent of their travel is last minute, which means increased costs to the bottom line. This session explores the best practices for managing your firm's travel, including hotel rate negotiations, unused ticket tracking and more robust reporting. You'll also learn how to put in place strategic solutions to help service your travelers more efficiently, drive travel policy compliance and increase bottom-line savings.

Objectives:

- Discuss the key factors needed to negotiate hotel and airline rates and upgrades.
- Analyze benchmarking travel spend data and policies of similar firms.
- Describe case studies of other firms to give examples of how tightening a travel policy can save money for the bottom line.

Audience: This session assumes that participants have a working knowledge of budgeting and travel in the law firm operations

60 Minutes

Audience: Intermediate

CLM App Management Category -FS: Financial Management

CPE Field of Study: Finance

CLE: Law Practice Management



HR22: Dysfunction Junction: Handling the 10 Most Difficult Law Firm Employees

Renee Culotta

Tuesday, April 4 10:15 AM - 11:15 AM

This presentation takes a look at the top 10 most difficult law firm employees to manage. We will explore common law firm personalities, including the trip wire (the partner who is considered a tyrant and feared by his subordinate employees); the constant complainer (who frequents the HR office with complaints about anything, everything and everyone); and the social butterfly (the cyber loafer more interested in social media and blogging rather than work).

**Objectives:**

- Identify when common law firm employment situations trigger legal concerns.
- Outline effective strategies to handle common law firm employment situations through policies, procedures and conflict resolution methods.
- Develop a plan of action to proactively handle employee complaints and problems, in an effort to deter and prevent litigation.

**Audience:** This session assumes that participants have a working knowledge of human resources management in a legal setting and US labor and employment laws. No advance preparation is required.

60 Minutes

**Audience:** Intermediate

**CLM App Management Category:** Communication Skills

**CLM App Management Category -FS:** Human Resources Management

**CPE Field of Study:** Personnel/HR

**CLE:** Law Practice Management



**LI22: What You Need to Know Now about Cyber Liability Insurance**

Uri Gutfreund

Tuesday, April 4 10:15 AM – 11:15 AM

Nearly every law firm is considering this coverage and yet there is little reliable information about how to purchase the right product for your firm. Policy coverage and language vary widely, so it is critical that you understand what you need and the best way to procure this policy. Your firm partners are counting on you to get this right so that your firm doesn't become the next news story. Come learn what needs to be in this critical policy.

**Objectives:**

- Examine what your sophisticated clients are demanding you purchase in order to keep their business.

- Identify your weakest links and real exposures.
- Discover what parts of the coverage may already be available in your existing policies.
- Recognize how the insurance coverage works for law firms in the various policies.

Audience: This session assumes that participants have a working knowledge of Web-based Technology and Lease/Contract Agreements.

75 Minutes

Audience: Intermediate

CLM App Management Category -FS: Legal Industry/Business Management

CPE Field of Study: Business Management & Organization

CLE: Law Practice Management



LI23: Staying the Course in Times of Change: The Multiple Hats of the Practice Manager in Succession Planning

Audrey Ehrhardt

Tuesday, April 4 10:15 AM - 11:15 AM

Law firm succession planning generates many challenges for the attorneys involved, but it holds just as many or more for the practice manager. During this time of transition, the practice manager undertakes additional, varied tasks and responsibilities necessary to both support the attorney and keep the practice moving forward. From transition preparation, documentation and follow through, to managing team, protecting brand consistency and ensuring ongoing work place efficiency, the practice manager needs a comprehensive, yet adaptable, strategy in place for keeping productivity and morale high during times of change.

Objectives:

- Discuss tools for developing essential strategies with attorney.
- Create a forum for dialogue to effectively handle employee questions.
- Review ongoing team building and motivation ideas.
- Prepare to identify and manage potential crises.

Audience: This session assumes that participants have a working knowledge of Succession planning and change management functions in the legal setting. No advance preparation is required.

60 Minutes

Audience: Intermediate



CLM App Management Category: Organizational Development

CLM App Management Category -FS:

CPE Field of Study: Business Management & Organization

CLE: Law Practice Management



OM22: Wellness: The Pit and the Pendulum...and the Carrot?!?

Karen L. Kirkpatrick

Tuesday, April 4 10:15 AM - 11:15 AM

Even if you're not a Hitchcock fan, you can recognize the difficulties in implementing a great solution to reduce long-term costs while navigating the legalities of such. The Affordable Care Act (ACA) and the Equal Employment Opportunity Commission (EEOC) have done nothing to simplify these plans, but once understood can be a boon to the bottom line. During this session, you'll see plan types, incentives (carrot vs. stick) and affordability influences. We'll examine the EEOC's final rules on employer wellness programs that determined how the Americans with Disabilities Act (ADA) and Genetic Information Nondiscrimination Act (GINA) requirements must be protected.

Objectives:

- Recognize the various types of wellness plans (participatory vs. health-contingent) and determine what your staff would be most motivated by.
- Discuss how to manage Health Risk Assessments (HRAs) legally.
- Explain what health history you can or cannot require from employees, spouses, dependents and adoptees.
- Outline how to implement a wellness plan to engage employees, lower plan costs and increase morale.

Audience: This session assumes that participants have a working knowledge of Wellness programming, and ADA and EEOC regulations in the legal setting.

60 Minutes

Audience: Intermediate

CLM App Management Category -FS: Operations Management

CPE Field of Study: Business Management & Organization

CLE: Law Practice Management



## OM23: The Era of Lean Training

Doug Striker

Tuesday, April 4 10:15 AM - 11:15 AM

In today's legal marketplace, clients have far more power than they used to have. The recession made clients much more savvy and diligent when it comes to hiring legal help, including the way they are willing to pay (fee agreements) and how much they are willing to pay. Simply put — today's clients are demanding proof that their legal teams are working efficiently to achieve their goals. This expectation is driving firms to focus more energy on staff training so that everyone is working at maximum efficiency. Yet, very few law firms have limitless resources to pour into training. Attendees will learn techniques to achieve Lean training — when you marry technology with a culture of accountability, you can conduct a highly effective training program for far less than you might imagine.

### Objectives:

- Create a Performance Improvement Plan (PIP).
- Demonstrate how to automate scheduling and participation.
- Recognize how to not waste your staff's time.
- Discover how to maximize your dollars.

**Audience:** This session assumes that participants have a working knowledge of information technology and systems in a law firm setting

60 Minutes

**Audience:** Intermediate

**CPE Field of Study:** Management Advisory Services

**CLE:** Law Practice Management



## LI24: 8 Ways Technology Managed Services can Benefit Your Firm

Stephen Cole Robert Mattern

Tuesday, April 4 2:45 PM - 3:45 PM

Managed Services around technology — especially in areas of litigation support/eDiscovery and document management — have garnered enormous buzz in the industry. Law firms are increasingly

presented with options to off-load their internal offerings concerning software, infrastructure, and services. The 2015 Mattern & Associates Managed eDiscovery and Litigation Support Survey indicates 28 percent of firms have entered into some form of Managed Services arrangement concerning their litigation support offering, with 46 percent of respondents indicating their firm is considering doing so. Additionally, the use of cloud-based solutions continues to gain traction in the legal market in areas such as Document Management. In this session, we'll discuss the driving factors behind this uptick and delve into the benefits law firms are reaping from procuring software, infrastructure, and services via a Managed Service agreement.

Objectives:

- Develop an understanding of technology Managed Services and current trends in this area.
- Discuss the primary benefits to law firms from outsourcing software, infrastructure, and services.
- Identify takeaways for how to implement an outsourced litigation support/document management strategy.

Audience: Attendees should have a working knowledge of business development and litigation support/eDiscovery in the legal industry. No advance preparation is required.

60 Minutes

Audience: Intermediate

CLM App Management Category -FS: Legal Industry/Business Management

CPE Field of Study: Business Management & Organization

CLE: Law Practice Management



LI25: Has Your Company Bridged the Gap Between Human Values and Ethics? Does It Matter?

Chuck Gallagher

Tuesday, April 4 2:45 PM - 3:45 PM

What causes otherwise intelligent people — people who know the difference between right and wrong — to make a choice that will negatively impact themselves and their organization? With a unique perspective gained from his own past experience, this session will shed new light on why we do what we do and how to influence behavior. Most ethics presentations and training programs focus on compliance and legal issues — as if ethical choices are either legal or not. The reality is, ethical choices have far more impact on a company long before the issue of "legal or illegal" comes into play. While your ethics code of conduct might meet all the standards required, the missing piece for most companies is the ability to help management and employees understand the human dynamic associated with conduct management.

**Objectives:**

- Examine specific human dynamics when it comes to ethical decisions.
- Identify key components involved in making ethical choices.
- Review the phases of "The Unethical Continuum."
- Develop a road map to keep employees' behavior between the ethical lines.

Audience: This session assumes that participants have a working knowledge of ethics and professional conduct, ethical decision making, and personal ethics. No advance preparation is required.

60 Minutes

Audience: Intermediate

CLM App Management Category -FS: Legal Industry/Business Management

CPE Field of Study: Behavioral Ethics

CLE: Law Practice Management



CM23: Ally or Adversary? The Three Secrets to Cultivating Strategic Relationships

Eric Spencer    Kelley Coyle Wyngarden

2:45 PM – 4:00 PM

Cultivating focuses on the how of successful business. Successful leaders are able to develop strategic relationships across the organization and industry. Ally relationships that ensure business results are achieved through employee engagement and collaboration. In organizations where toxic behaviors are ignored, inefficiencies abound, productivity and customer satisfaction decline, costs go up. As a result, especially in turbulent times, those who have not spent the time to cultivate winning relationships may find results deteriorate just when outstanding team performance is required.

**Objectives:**

- Explain why quality working relationships matter, the business and personal impact.
- Apply the Relationship Ecosystem™ to diagnose the health and quality of your professional relationships.
- Describe the next steps to develop ally relationships and manage adversarial relationships.

**Audience Level:** Intermediate



## CM24: Leading from All Sides: The Realist's Guide™ to Leadership

Craig Price

Tuesday, April 4 2:45 PM – 4:00 PM

In a world of vastly different personalities and perspectives, finding ways to get all the pieces to fit into a cohesive and effective organization can be a challenge. If you want to be a good leader, good manager or a good employee, there is no one way. Often, the way you interact needs to change with each person and each situation. In this innovative, practical and entertaining program, discover realistic ways you can create a consistently successful leadership approach by adapting to differing personalities and creating the flexibility necessary to be a leader in today's changing world.

### Objectives:

- Create effective teams by embracing the talents of others.
- Understand the importance of Personality vs. Attitude.
- Respond effectively to different personalities.
- Merge opposing viewpoints into effective outcomes.

Audience: Attendee at any level will benefit from this session. No advance participation is necessary.

75 Minutes

Audience: Basic

CLM App Management Category: Organizational Development

CLM App Management Category -FS:

CPE Field of Study: Business Management & Organization

CLE: Law Practice Management



## FM24: Incorporating Outside Counsel Guidelines into Your Firm's Billing Processes

Christine Smith

Tuesday, April 4 2:45 PM - 4:00 PM

In this session, we'll discuss best practices around outside counsel guidelines, including how to successfully incorporate them into your billing processes. We'll also examine how today's law firms can provide value to their clients throughout the timekeeping and invoicing process.

### Objectives:

- \* Identify how to ensure accurate timekeeping to add value to work.
- \* Discuss how to create intake process to include e-billing information and eliminate NBI errors.
- \* Analyze your firm's timekeeping for e-billed clients to ensure value of work performed.

Audience: This session assumes that participants have a working knowledge of Law firm accounting and billing practices.

75 Minutes

Audience: Intermediate

CLM App Management Category -FS: Financial Management

CPE Field of Study: Management Advisory Services

CLE: Law Practice Management



## HR23: Understanding and Working Through Racial Microaggressions

Caprice Hollins

Tuesday, April 4 2:45 PM - 4:15 PM

When we engage in conversations across cultures, there is always the risk that what we say might offend someone. Oftentimes we don't even know why what we said was offensive. But rather than risk offending, many people avoid cross cultural dialogue altogether or cling to politically correct terminology. The tightrope we walk and the mental labor that ensues is exhausting, and often leaves everyone involved feeling unheard or misunderstood. This session will cover what has commonly become known as microaggressions — what they are, why people often react the way they do, and

strategies for engaging effectively across cultures when racial tension exists in our personal and professional relationships.

Objectives:

- Define what microaggressions are.
- Identify strategies for engaging in conversations when racial tension exists.
- Extend your cultural competence.

Audience: This session assumes that participants have a working knowledge of human resource needs and procedures in a legal setting. No advance preparation is required.

90 Minutes

Audience: Intermediate

CLM App Management Category: Communication Skills

CLM App Management Category -FS:

CPE Field of Study: Personnel/HR

CLE: Law Practice Management



HR24: ADA and ADAAM Training for Human Resources

Renee Culotta

Tuesday, April 4 2:45 – 4:15 PM

It's important for law firm employers to develop policies and procedures that identify and effectively respond to disabled employees and requests for reasonable accommodation. And recent changes and court interpretations to the Americans with Disabilities Act (ADA) — specifically the expansion of the definition of employees considered disabled under the ADA and increase in Equal Employment Opportunity Commission (EEOC) charges alleging violations of the ADA — make it even more of a priority. Participants will be able to identify triggers to the ADA interactive process, develop a systematic process for responding to requests for accommodation, and learn the most common reasonable accommodations that must be provided to employees.

Objectives:

- Recognize the provisions of the ADA and ADA Amendments Act.
- Develop knowledge on the most recent EEOC and court interpretations of who is considered a disabled employee under the ADA.
- Identify when employees are requesting reasonable accommodation and triggering the interactive process.
- Outline how to assist employees and applicants requesting reasonable accommodation.

Audience: This session assumes that participants have a working knowledge of human resource management in the legal industry and U.S labor and employment laws. No advance preparation is required.

90 Minutes

Audience: Intermediate

CLM App Management Category -FS: Human Resources Management

CPE Field of Study: Personnel/HR

CLE: Law Practice Management



OM24: Practical Legal Project Management: Kick-starting an LPM Initiative

Tom Baldwin

Tuesday, April 4 2:45 PM - 4:15 PM

If you're just getting started with legal project management (LPM), or you want to breathe life into an existing initiative, this hands-on workshop will get you headed in the right direction. This session is designed for senior law firm administrators who are responsible for implementing LPM or supporting lawyers in LPM initiatives, and anyone interested in optimizing an LPM initiative. Many firms have tried and failed to implement effective LPM systems. Others haven't got enough buy-in to see any real benefit. The usual approach does not work. Lawyers balk at the complexity. Smaller firms lack sufficient resources. This session will introduce you to a simpler, more practical approach to LPM and a useful tool for identifying the practice areas that can benefit from it the most. You can implement effective LPM with fewer resources and greater buy-in as part of an integrated approach to performance excellence.

Objectives:

- Demonstrate why your firm should implement LPM.
- Analyze what benefits your firm and your clients will see.
- Identify your starting point using a data monitoring tool.
- Illustrate how LPM can form part of an integrated approach to performance excellence.

Audience: This session assumes that participants have a working knowledge of legal project management in the legal industry.

90 Minutes

Audience: Intermediate

CLM App Management Category -FS: Operations Management



CPE Field of Study: Production

CLE: Law Practice Management



OM25: We've Been Hacked! Now What?

Ryan Cooper Uri Gutfreund Rob Kleeger

Tuesday, April 4 2:45 PM - 4:15 PM

Experience a real life example based on a real hacking incident at a law firm. The panel takes attendees through a real hacking incident and engages the attendees to answer questions about what to do.

Objectives:

- Examine the breach response — who needs to be called, reported to and the steps needed to best protect the firm.
- Describe good defense strategies.
- Evaluate good cyber insurance policies.

Audience: Attendees should have working knowledge of Information governance and cyber security in the legal industry. No advanced preparation is required.

90 Minutes

Audience: Intermediate

CLM App Management Category -FS: Operations Management

CPE Field of Study: Computer Science

CLE: Law Practice Management



HR25: General Session - Gray Area Thinking: Understanding Diverse Humans and Welcoming Transgender Attorneys, Coworkers and Clients

Ellen Krug

Tuesday, April 4 4:30 PM - 5:30 PM

Our society is tackling many issues relative to diversity and how to be welcoming toward and inclusive of persons who are "different." This includes challenges relative to accepting transgender or gender

nonconforming persons. With this presentation, Ellie Krug (a trial attorney who transitioned from male to female in 2009 at age 52) provides a toolkit, "Gray Area Thinking," as a way of understanding and welcoming humans of all persuasions. As a part of this training, she shares about what it means to be transgender and offers tips on how to welcome your firm's first (or second or third) transgender attorney, coworker and client. The presentation includes a discussion about inclusivity, "allyship" and the need for greater compassion for all humans.

Objectives:

- Identify how we collectively label and group others who are "different" and the resulting obstacles toward inclusivity.
- Describe ways of understanding and remembering our commonalities.
- Discuss what it means to be transgender and gender nonconforming and specific ways to make the workplace more inclusive toward those humans.
- Illustrate how we all ripple to each other in either positive or negative ways.

Audience Statement: This session assumes that participants have a working knowledge of the legal industry and Human Resource practices in the legal industry. No advance preparation is required.

60 Minutes

Audience: Intermediate

CLM App Management Category -FS: Human Resources Management

CPE Field of Study: Personnel/HR

CLE: Recognition and Elimination of Bias in the Legal Profession and Society

HRCI: General Credit



## Education Wednesday, April 5



CM30: How to Tell When Someone is Lying

Traci Brown

Wednesday, April 5 8:30 AM - 9:30 AM

Are you winning the game of Two Truths and a Lie? You play every day and don't even know it. Detecting lies is crucial in business and life. Do you know if your clients really like your proposal? Do they like the job you did? Are they telling you the truth about their budget? Are they telling you all of their needs? Are the people you're interviewing inflating their resume? And, most importantly, did your kids eat those chocolate donuts that were on the counter or did the dog? This program uses videos from current events to demonstrate techniques. To apply the learning, we'll play Two Truths and a Lie.

Objectives:

- Identify how to instantly tell if someone is lying.
- Explain which lies are important.
- Breakdown how to elegantly uncover the truth.

Audience: This session assumes that participants have a working knowledge of communication techniques in the legal industry. No advance preparation is required.

60 Minutes

Audience: Intermediate

CLM App Management Category: Communication Skills

CLM App Management Category -FS:

CPE Field of Study: Communications

CLE: Law Practice Management



FM30: Managing the Money: Legal Ethics Related to Trust Accounts?

Margaret Brown Funk

Wednesday, April 5 8:30 AM - 9:30 AM

While each state has its own ethical rules governing an attorney's use of a client trust account, most states have adopted the ABA Model Rules for Client Trust Account Records. Rule 1.15 of the ABA Model Rules of Professional Conduct requires that lawyers who are entrusted with the property of law clients and third persons in the practice of law must hold that property with the care required of a professional fiduciary. In this session, we will discuss the practical implementation of Model Rule 1.15, common mistakes, and tried and tested solutions from a regulation counsel's perspective. If you manage your firm's trust account or supervise others who manage the firm's trust account, this session is for you.

Objectives:

- Discuss the requirements of ABA Model Rule 1.15.
- Analyze common ethical issues that arise in managing client trust accounts.
- Outline best practices for managing client trust accounts.

60 Minutes

Audience: Intermediate

CLM App Management Category -FS: Financial Management

CPE Field of Study: Behavioral Ethics

CLE: Legal Ethics



FM31: Internal Controls and Segregation of Duties: How to Structure in Your Small Firm

Ron Seigneur

Wednesday, April 5 8:30 AM - 9:30 AM

This session will focus on the tactics and protocols legal management professionals need to be aware of to properly maintain the custody and security of firm assets, both tangible and intangible in nature.

Emphasis will include discussion of how to protect the reputation of the firm and its attorneys as the key intangible asset of a professional services firm. Examples will be provided of prior breaches at law firms and the lessons to be learned from them.

Objectives:

- Demonstrate an understanding of internal control basics, including proper segregation of duties.
- Examine what to do when personnel are added or leave the firm in order to protect firm assets.
- Identify the four key traits that cause individuals to embezzle or commit fraud.

Audience: This session assumes that participants have a working knowledge of asset management and financial management in the legal industry. No advance preparation is required.

60 Minutes

Audience: Basic

CLM App Management Category -FS: Financial Management

CPE Field of Study: Finance

CLE: Law Practice Management



HR30: Marijuana in the Workplace

Judge Mary A. Celeste

Wednesday, April 5 8:30 AM - 9:30 AM

As more marijuana laws take affect across the country, more workplaces are impacted. Legal management professionals — be it in the context of the office or courthouse — will be facing legal employment issues regarding marijuana use. This presentation will help administrators to develop workplace drug policies and testing. It will also discuss the prevalent and relevant marijuana laws across the country and review appellate cases that deal with recreational and medical marijuana use in the workplace. It will also address the application of the Americans with Disabilities Act and its relationship to medical marijuana use.

Objectives:

- Identify the recreational and medical marijuana laws.
- Discuss marijuana employment cases across the country.
- Explain drug workplace policies.
- Apply the American with Disabilities Act to medical marijuana use.
- Analyze the existing science and technology for drug testing. Audience: Basic

Audience: Attendee at any level will benefit from this session. No advance participation is necessary.

60 Minutes

Audience: Basic

CLM App Management Category -FS: Human Resources Management

CPE Field of Study: Personnel/HR

CLE: Law Practice Management



L130: Everything You Need to Know About Insurance in 60 minutes

Uri Gutfreund

Wednesday, April 5 8:30 AM - 9:30 AM

Legal management professionals are incredibly busy and juggle a variety of insurance responsibilities. This action-packed, one-hour session will cover best practices across all lines of coverage, including professional liability, health, property and casualty, cyber liability and employment practices liability insurance (EPLI). You will walk away with dozens of ideas that you can implement right away in your firm.

Objectives:

- Outline big picture best practices across the lines.
- Differentiate the most important areas that you can impact your firm.
- Evaluate ways to better focus yourself and managing partners on the critical decision areas.

Audience: This session assumes that participants have a working knowledge of X, Y, and Z. No advance preparation is required.

60 Minutes

Audience: Intermediate

CLM App Management Category -FS: Legal Industry/Business Management

CPE Field of Study: Business Management & Organization

CLE: Law Practice Management



## LI31: How to Help Senior Partners and Administrators Transition Out of Practice and Prepare Their Successors

Ida Abbott

Wednesday, April 5 8:30 AM - 9:30 AM

Few law firms have succession planning processes. Even fewer help partners or senior administrators prepare for the transition from law practice to the next stage of their lives and careers. Vast numbers of Baby Boomers will soon have to make this transition, but do not know where or how to begin. Fearful of losing their professional identity and unsure of what awaits them if they leave the firm, many hold tightly to their clients and responsibilities and stay at work longer they want to or should. This can frustrate younger professionals whose prospects for business growth, professional advancement and leadership are blocked. Firms can prevent this situation by helping senior lawyers and administrators prepare to enter their next stage with confidence and enthusiasm. This program will present an approach to help senior professionals make a smooth transition out of practice, while preparing their successors and promoting continuity and stability in the firm.

### Objectives:

- Examine the need for a succession planning process that includes helping senior lawyers and administrators prepare to transition out of their current roles.
- Recognize and overcome the factors that may prevent senior professionals from planning for the next stages of their lives and careers.
- Design an approach to transition-assisting practices that will be suitable for the senior professionals in their firms.

**Audience:** This session assumes that participants have a working knowledge of Succession planning and human resource functions in the legal setting. No advance preparation is required.

60 Minutes

**Audience:** Intermediate

CLM App Management Category -FS: Legal Industry/Business Management

CPE Field of Study: Personnel/HR

CLE: Law Practice Management



## OM30: Design Opportunities for the Next Generation of Law Firms

Jason deChambeau

Wednesday, April 5 8:30 AM - 9:30 AM

Looking beyond law firm office design may help unlock new ways of space utilization and planning strategies. This session will identify current drivers of change and strategies that address potential solutions. During the session, implementation of contemporary workplace models will be presented and a comprehensive design process will be introduced.

Objectives:

- Identify current drivers of change influencing the workplace.
- Identify benchmarking beyond the legal workplace.
- Describe a design process that identifies relevant drivers of change and prioritizes project goals to build stakeholder consensus and deliver a modern workplace.

Audience: This session assumes that participants have 10 years of experience and/or advanced degree in field of study

60 Minutes

Audience: Advanced

CLM App Management Category -FS: Operations Management

CPE Field of Study: Business Management & Organization

CLE: Law Practice Management



OM31: Social Media, Privacy and Trade Secrets

R. Mark Halligan

Wednesday, April 5 8:30 AM - 9:30 AM

The intersection of social media, privacy and trade secrets raises many legal and practical issues for law practice management professionals. In this advanced interactive session, we will discuss recent developments in trade secret law including the new Defend Trade Secrets Act of 2016, which creates a federal civil cause of action for trade secret misappropriation and adds whistleblower provisions and statutory notice requirements. We will address bring your own device (BYOD) and corporate-owned personally-enabled (COPE) policies contrasting the risks associated with such policies. We will also address privacy issues and security risks emanating from the increasing use of social media and other hot-button issues, such as ownership rights in customers and contacts generated by social media.

Objectives:

- Explain trade secrets and the Defend Trade Secrets Act of 2016.
- Analyze the legal risks associated with the intersection of social media, privacy and trade secret protection.



- Review best practices and other emerging issues for law practice management professionals involved with social media, privacy and trade secret issues.

60 Minutes

Audience: Advanced

CLM App Management Category -FS: Operations Management

CPE Field of Study: Management Advisory Services

CLE: Law Practice Management



CM31: David M. Brezina Memorial Session: Giving Voice to Values: The "How" of Values-Driven Leadership

Mary C. Gentile

Wednesday, April 5 9:45 AM - 11:15 AM

In this session, we'll discuss a ground-breaking new approach to preparing managers and leaders for values-driven action. Drawing on both the actual experience of organizational practitioners — as well as cutting edge research — Giving Voice to Values (GVV) fills a long-standing and critical gap in our understanding of how to enable ethical practice. Rather than a focus on ethical analysis, GVV focuses on ethical implementation and asks the question: "What if I were going to act on my values? What would I say and do? How could I be most effective?" GVV holds the promise to transform the foundational assumptions upon which the teaching of values-driven leadership is based, and importantly, to equip future organizational leaders to not only know what is right — but how to make it happen.

Objectives:

- Discuss the missing link in business ethics and compliance training and how to address it.
- Identify individual strengths and align them with personal and professional purpose in the pursuit of values-driven leadership.
- Discover how scripting, practice and the "GVV Thought Experiment" builds the ethics muscle.
- Examine how companies are using the GVV methodology to develop values-driven leadership.

60 Minutes

Audience: Basic

CLM App Management Category: Organizational Development

CLM App Management Category -FS:

CPE Field of Study: Communications

CLE: Law Practice Management



## FM32: Payroll Mistakes that Can Land You in Hot Water

Lauraine Bifulco

Wednesday, April 5 1:15 PM - 2:30 PM

Lawsuits related to employers' payroll practices are dramatically on the rise. During this fast-paced session, you will master federal legal principles governing the payment of wages. You'll also understand how state laws can differ from the federal regulations, and ways in which to avoid liability in this highly litigated area of the law. You will also learn the common mistakes made regarding hours worked, meal and rest periods, calculating bonus and commission amounts, wage statement requirements, proper overtime calculations, expense reimbursements, and inappropriate deductions from exempt employees' pay.

### Objectives:

- Outline new minimum wage regulations and how they impact wage thresholds for exempt classifications.
- Determine when you can and can't make deductions from exempt employees' pay.
- Explain ways to deal with commission and bonus plans.
- Determine what must be reported on the wage statement, when final paychecks must be provided and the penalties/fines associated with payroll mistakes.

Audience: This session assumes that participants have a working knowledge of payroll systems and state and federal labor regulations in the legal industry.

75 Minutes

Audience: Intermediate

CLM App Management Category -FS: Financial Management

CPE Field of Study: Finance

CLE: Law Practice Management



## FM33: Tax Updates and Year- End Planning for Various Entity Types

Ron Seigneur

Wednesday, April 5 1:15 PM - 2:30 PM

This session will focus on recent tax law changes that impact law firms and attorneys, including income, use, sales and employment taxes. The session will emphasize recent changes in tax law and protocols and related enterprise level planning. Critical tax planning issues at the individual attorney level will also be addressed. The session will compare and contrast entity level planning for C corporations, S corporations, limited liability partnerships and sole proprietorships.

**Objectives:**

- Review an update on recent federal and state tax law changes that impact law firms.
- Discuss how to optimize the annual planning process and determine who should be involved.
- Examine the differences in tax planning between entity types.
- Develop an understanding of how owner-employees can use retirement plans and other tactics to mitigate income tax liabilities.

**Audience:** This session assumes that participants have a working knowledge of tax planning and compliance and tax laws. No advance preparation is required.

75 Minutes

**Audience:** Intermediate

CLM App Management Category -FS: Financial Management

CPE Field of Study: Taxes

CLE: Law Practice Management



HR31: Executive Presence: How to Achieve Greater Influence in Your Firm

Elizabeth Fried

Wednesday, April 5 1:15 PM - 2:30 PM

It's not that top leaders lack external technical/business skills — it's that they lack the internal confidence and accompanying skillset for the subtleties required to project the gravitas of an influential leader. As an administrative, operations or human resources professional, you are in a key position to help your leaders bridge this gap. This presentation defines and outlines components of executive presence. It provides practical activities and resources to help you personally become a better leader. It also will help you mentor the leadership team to effectively project influence and gain employee respect. When combined, these tools will enable you, the partners and emerging leaders to be more effective in engaging and enrolling employees to carry out the firm's vision, mission and business strategy.

**Objectives:**

- Identify ways to develop your leadership teams' awareness of the need for executive presence.

- Demonstrate how to mentor or coach your management team in acquiring the three key attributes of executive presence.
- Examine techniques that help you and your leaders manage stress to provide a consistent behavioral style that builds credibility and moves the organization forward.

Audience: This session assumes that participants have a working knowledge of human resources management. No advance preparation is required.

75 Minutes

Audience: Intermediate

CLM App Management Category: Self-Management Skills

CLM App Management Category -FS: Human Resources Management

CPE Field of Study: Personal Development

CLE: Law Practice Management



CM32: The Story Teller's Secret

Jason Ashlock

Wednesday, April 5 1:15 PM - 2:45 PM

Revealing we are all storytellers at heart, this session aims to help build the capacity to understand how stories work, how they're built and why they stick. Transforming an organization's communications practices — graduating them from clumsy to focused, from random to intentional, from scattered to purposeful — we'll explore the power of narrative design. In this fast-paced, inventive keynote, you'll be handed tools used by some of the greatest storytellers of our time, learning how to aggregate, curate and amplify your message. Putting those story-making tools to use, you'll elevate standard keynotes into contagious messages, transform conference room presentations into memorable experiences, and convert the most mundane email chains and team meetings into behavior-changing, performance-driving events. And you'll do it all on the back on a shared, fundamental human hunger for stories that move, motivate and matter.

Objectives:

- Outline the fundamentals of good storytelling and the structure that underpins narratives that stick.
- Discuss how to aggregate, curate and amplify a message
- Identify how to elevate standard keynotes into contagious messages.

Audience: Attendee at any level will benefit from this session. No advance participation is necessary.

90 Minutes

Audience: Basic

CLM App Management Category: Communication Skills

CLM App Management Category -FS:

CPE Field of Study: Communications

CLE: Law Practice Management



HR32: Reality-Based Accountability: Hardwiring Accountability into Your Workforce and Coaching for Great Performance

Kelli Hinshaw

Wednesday, April 5 1:15 PM - 2:45 PM

Everyone is talking about accountability, but few organizations are actually successful in ensuring that personal accountability is hardwired into their talent and everyday business operations. Accountability has been elusive for many organizations, as they have not yet come to understand how to calculate the true value of an employee, how to drive it through great leadership, and how to measure the results. Join the reality-based revolution as we break down the core competency of personal accountability and give you no nonsense, workable strategies to hire for, coach for, and develop for accountability in your workforce!

Objectives:

- Develop a true understanding of the four elements of the competency of accountability.
- Discover the relationship between accountability and engagement.
- Examine the importance of coaching and mentoring in the development process.
- Identify a variety of performance management techniques.

Audience: Attendees should have a working knowledge of human resources management. No advance preparation is required.

90 Minutes

Audience: Intermediate

CLM App Management Category: Organizational Development

CLM App Management Category -FS: Human Resources Management

CPE Field of Study: Personnel/HR

CLE: Law Practice Management



## LI32: Alternative Approaches to Secretarial Support

P. Douglas Benson Mark Santiago Gera Vaz

Wednesday, April 5 1:15 PM - 2:45 PM

The way that law firms support their professionals is rapidly changing. Technology, millennials and the availability of high-quality secretarial staff have all contributed to the change. The days of one-to-one reporting relationships are long gone and the current support ratios of three or four to one are close behind. Today, best practices in law firms is six, seven or as many at ten-to-one support ratios. How can a firm achieve these types of ratios without sacrificing service levels? This session will cover a methodology to analyze existing secretarial and word processing support structures, and discuss an alternative administrative support structure.

### Objectives:

- Analyze the type of support attorneys require.
- Evaluate the effectiveness of current support ratios.
- Identify additional support opportunities/requirements of attorneys.
- Develop implementation plans.
- Assess savings.

Audience: Attendees should have a working knowledge of legal services trends. No advance preparation is required.

90 Minutes

Audience: Intermediate

CLM App Management Category -FS: Legal Industry/Business Management

CPE Field of Study: Business Law

CLE: Law Practice Management



## OM32: A Successful Migration to the Cloud: Preparing for Success

Adam Citron

Wednesday, April 5 1:15 PM - 2:45 PM

Cloud services are here to stay. Join this interactive session where you will gain practical information on how to prepare for a successful migration. Discover the top considerations to avoid choosing the wrong provider. Learn the most important topics to discuss with your board. Develop a strategy for your firm.

Objectives:

- Discover the type of cloud service that is best for your firm.
- Identify the top questions to answer internally first.
- Design a preparation worksheet during the workshop.

Audience: This session assumes that participants have a working knowledge of information technology and systems in a law firm setting.

90 Minutes

Audience: Intermediate

CLM App Management Category: Information Technology

CLM App Management Category -FS: Operations Management

CPE Field of Study: Administrative Practice

CLE: Law Practice Management



OM33: Don't Let the Fine Print "Gotchas" Get You!

Mary Redmond

Wednesday, April 5 1:15 PM - 2:45 PM

This workshop reveals the camouflaged areas in equipment finance and service agreements that can result in cost overruns, blown budgets and destroy cash flow projections. You'll learn to more quickly identify termination penalties, added fees, automatic renewals and "not-so-fair" market value buyouts. Attendees will also master methods that make it easier to analyze and negotiate contracts and agreements and leave with tools to improve your firm's ROI.

Objectives:

- Identify 10 questions you must ask before signing another lease contract.
- Discuss how to quickly spot a "gotcha" and how to negotiate it out of the contract.
- Explain the five phrases you must modify in every agreement to avoid "gotchas."
- Recognize when the equipment maintenance commitment fits your company.
- Examine ways to ensure you never face a surprise invoice again.

Audience: This session assumes that participants 10 years of knowledge of contracts and lease agreements in the legal industry.

90 Minutes

Audience: Advanced

CLM App Management Category -FS: Operations Management

CPE Field of Study: Administrative Practice

CLE: Law Practice Management



OM34: Conversion: Your Nightmare or Your Daylight!

Lisa R. Dasher Bianca Moreiras

Wednesday, April 5 1:15 PM - 2:45 PM

Is it time to replace your server? Or move your platform to the cloud? What about dummy terminals or portable devices? Trying to decide about upgrading your software or a major accounting software transition? Do you have a realistic conversion budget in place, or will this conversion break the bank? Need answers to these questions? In this session, attendees will learn that even with an ounce of prevention, the best laid plans don't always turn out the way they should. We'll also discuss how to avoid issues and provide realistic timelines that will remove some of the pressure — as well as address some of the problems that will likely arise during the process.

Objectives:

- Identify key critical areas that must be noted prior to conversion.
- Outline a checklist of dates and items prior to conversion.
- Prepare to head off issues and problems once the conversion takes place.

Audience: This session assumes that participants have a working knowledge of project management plans in the legal industry.

90 Minutes

Audience: Intermediate

CLM App Management Category -FS: Operations Management

CPE Field of Study: Administrative Practice

CLE: Law Practice Management





## FM35: “New Money” – Managing Law Firm Revenue at Client Intake

Seelin Naidoo

Wednesday, April 5 3:00 PM - 4:00 PM

If only law firms “knew then what they know now” about their clients .... The clues were there from the beginning, when the client engagement began. This session asks participants to consider client engagements that resulted in write-offs (bad debt), and what can be done to mitigate loss in the future. What were the warning signs? We discuss criteria for accepting new clients and assessing their financial risk to the law firm. Does your firm use a New Client Risk Rating system? Law firm financial managers are encouraged to identify ways to deal with problem clients early in the cash flow cycle. The session will explore types of analytics for assessing new client exposure, and discuss steps to mitigate that exposure.

Objectives:

- Learn ways to anticipate potential bad debt early in the attorney-client relationship.
- Examine policies to encourage lower revenue risk from new clients or new matters.
- Harness existing time and billing software or analytics tools to identify potential accounts receivable problems early in the cash flow cycle.

Audience: This session assumes that participants have a working knowledge of revenue management and law firm profitability in the legal industry.

60 Minutes

Audience: Intermediate

CLM App Management Category -FS: Financial Management

CPE Field of Study: Finance

CLE: Law Practice Management



## LI33: The Tsunami Impact Is Now Here

William Cobb

Wednesday, April 5 3:00 PM - 4:00 PM

When the tsunami comes ashore as predicted last year, there will be a multitude of issues that will be critical for administrators. As IBM's Watson becomes more and more integrated into the everyday operations of the legal profession, three very big issues are emerging: 1) disintermediation moving lawyers out of equity positions to nonequity; 2) deleveraging the firm as associates and paralegals become less important to the delivery of services; and 3) the purge of partners based upon metrics that may destroy the law firm. All of these problems will take five to seven years to solve. The solutions will

have to be executed in the context of a firm's value system, strategies and partner review and evaluation system to ensure a viable future.

Objectives:

- Identify the issues that must be addressed to prepare for the next six years in the firm.
- Discuss which issue solutions will have the highest impact and the highest probability of success.
- Describe ways legal management professionals can motivate their employers to address the needed changes.
- Outline a timeline of steps to accomplish the required changes.

Audience: This session assumes that participants have 10 years of experience and/or advanced degree in field of study.

60 Minutes

Audience: Advanced

CLM App Management Category -FS: Legal Industry/Business Management

CPE Field of Study: Business Law

CLE: Law Practice Management



OM35 Surviving an Active Shooter

Robert Southern

Wednesday, April 5 3:00 – 4:00 p.m.

We live in a time where active shooters are becoming almost commonplace. We need to be able to properly plan for this circumstance both at home and at our offices. Do you know what to do if you are involved in an active shooter situation? Getting trained is your best defense. Learn how to preserve your life in the event of an active shooter by a detective in the Denver Police Department. This course is designed by the Denver Police Department and the Office of Risk Management.

Objectives:

- Recognize an active shooter profile.
- Discuss the “Run, Hide, Fight” method.
- Identify what is important to assess when reviewing emergency response plans.

Audience: Attendees should have a working knowledge of workplace safety issues. No advance preparation is required.

- 60 Minutes

- Audience: Intermediate
- CLM App Management Category -FS: Operations Management
- CPE Field of Study: Business Management & Organization
- CLE: Law Practice Management



### OM36: Mobile Device Security for Today's Technology

Adam Citron

Wednesday, April 5 3:00 PM - 4:00 PM

Everyone uses a mobile device. Accessing company data on that device is essential in today's world, whether that's just email and calendar, or files and applications. With the plethora of phone types available and the need for instant and secure access to company data, it's more important than ever not to ignore the risks associated with allowing this type of access. Join this session and learn about what your firm can do to protect firm and client data, while still providing staff secure and convenient access from their mobile devices.

#### Objectives:

- Examine the risks of accessing firm data on mobile devices.
- Discover the different types of security methods.
- Discuss some available mobile device security technologies.

60 Minutes

Audience: Intermediate

CLM App Management Category -FS: Operations Management

CPE Field of Study: Computer Science

CLE: Law Practice Management



### CM33: Captivate: Presentations That Engage and Win Over Today's Distracted Audiences

Steve Hughes

Wednesday, April 5 3:00 PM - 4:15 PM

What if you were the most amazing presenter in the world? What if every time you stood up to suggest a new idea or propose a change, people would listen and act on your recommendations? The good news

is that anyone can learn to captivate an audience and command a room. In this session, you'll discover how to instantly build rapport with others, use your nervousness to your advantage and handle questions with confidence. Using the latest research and real-world success stories, you'll walk away equipped and inspired to make a lasting impact within your firm.

**Objectives:**

- Outline how to grab people's attention from your very first words and keep it throughout your presentation.
- Discover the secrets to being perceived as more confident.
- Explain how to field any question with poise and flair.
- Demonstrate how to use PowerPoint to be more compelling.

**Audience:** This session assumes that participants have a working knowledge of communication skills in the legal industry. No advance preparation is required.

75 Minutes

**Audience:** Intermediate

**CLM App Management Category:** Communication Skills

**CLM App Management Category -FS:**

**CPE Field of Study:** Communications

**CLE:** Law Practice Management



**FM34: The Financial Reporting Checklists Every Firm Should Be Doing**

Rebecca Kelley

Wednesday, April 5 3:00 PM - 4:15 PM

In this session, we'll build the checklist of critical tasks that are essential for well-managed financial reporting. Attendees will learn what makes a solid foundation for financial reporting and how periodic checks and reviews lead to better and more timely decision making.

**Objectives:**

- Describe how to build a financial reporting checklist for your firm.
- Summarize three ways to maintain control and oversight without being in the details.
- Review comparative financial analysis for your firm. Audience Level: Intermediate

**Audience:** This session assumes that participants have a working knowledge of Law firm financial management and reporting practices.

75 Minutes

Audience: Intermediate

CLM App Management Category -FS: Financial Management

CPE Field of Study: Management Advisory Services

CLE: Law Practice Management



HR33: A Profession on Notice: The Ethical and Liability Case for Why Law Firms Must Get Serious About Substance Abuse

Link Christian

Wednesday, April 5 3:00 PM - 4:15 PM

Recently, the Journal of Addiction Medicine published a groundbreaking study by Hazelden Betty Ford and the American Bar Association Commission on Lawyer Assistance Programs titled, "The Prevalence of Substance Use and Other Mental Health Concerns among American Attorneys." Although it had been commonly presumed that the legal profession had a heightened rate of these problems, nobody expected the numbers — reported by only active, practicing attorneys — to rise to the level that they did. The study clearly revealed a full-blown crisis that cannot be ignored. This program will outline the enhanced ethical and legal problems which loom, but, more importantly, suggest 10 specific strategies which firms and administrators can employ immediately to address this issue. These strategies should be of increased relevance for any legal managers, both in respect to their own personal issues as well as their role in formulating and executing pro-active planning to prevent and reduce impairment within the firm.

Objectives:

- Review the findings of the study, emphasizing the number of actively impaired attorneys.
- Explain the increased ethical problems the firm is likely to encounter if it does not address the issues raised in the study.
- Describe the heightened legal liability the firm will face if a protocol is not established for identifying, confronting and assisting with substance abuse problems.
- Discuss 10 specific strategies to initiate now to avoid ethical and legal consequences and to promote a culture of prevention, wellness and support.

Audience: This session assumes that participants have a working knowledge of the legal industry. No advance preparation is required.

75 Minutes

Audience: Intermediate

CLM App Management Category -FS: Human Resources Management

CPE Field of Study: Personnel/HR

CLE: Law Practice Management

Session Code Key

CM – Communications & Organizational Management

FM – Financial Management

HR – Human Resources Management

LI – Legal Industry/Business Management

OM – Operations Management