

Thursday, May 3

LI10: Welcome and Keynote: What Would You Do? Business Edition



Thursday, May 3 9:30 AM - 11:00 AM

The chances of getting caught on hidden camera by "What Would You Do?" are tiny compared to the everyday dangers of the digital age — especially in the business world. We live in a time when the boundaries between our personal and professional selves are blurred, reputations can be lost in an instant, and mistakes live on forever. From years of observing the best and worst of human nature, John Quiñones helps you discover "What Would You Do?" if business and ethics cross?

Objectives:

- Explore the dilemmas that leaders, employees and organizations face in this brave new world of transparency.
- Discuss how no matter how advanced we become, it all still comes down to doing the right thing.

Other Information:

- 60 Minutes
- Audience: Basic
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Business Management & Organization

Speaker Info: John Quinones

CM10: Giving and Receiving Feedback for Performance Improvement



Thursday, May 3 11:15 AM - 12:15 PM

Many organizations are abandoning annual reviews in favor of more frequent and specific feedback to improve performance. Employees are asking for more concrete and timely feedback on their work product and team performance. Giving and receiving feedback is the key for high-performing teams. In this session, participants will learn the

situation, behavior and impact (SBI) approach to giving feedback to minimize defensiveness and maximize performance improvement. Participants will learn and practice the SBI model with each other, using both positive and constructive feedback.

Objectives:

- Review the SBI model for giving and receiving feedback.
- Practice the SBI model and get feedback from others.
- Develop a plan to give feedback at work.
- Explain how to teach the SBI model to others.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category: Communication Skills
- CPE Field of Study: Communications

Speaker Info: Mark Beese

HR10: How Gender Diversity Is Key to Organizational Success



Thursday, May 3 11:15 AM - 12:15 PM

With the changing face of the workforce, gender diversity is a key business strategy to sustaining an inclusive and diverse legal profession. Some employers have started to meet this challenge, while others are struggling to catch up. Initiatives meant to create gender balance need to spread the responsibility for success among organizational leaders and become part of the overall strategic mission and culture of the firm. Whether your organization is in the beginning, middle or "stalled" stage with pushing through these efforts, this discussion will explore how more seasoned professionals can help make the business case for gender diversity and its intersection with holistic flexibility. By working through the business case, you'll gain the knowledge to start advancing gender diversity and sustainability at the individual, client and organizational levels to create inclusive cultures that attract and retain top talent.

Objectives:

- Discuss trends/research on gender diversity.
- Review and be able to work toward the business case for why firms should care.
- Identify concrete strategies to engage and gain the support of outside counsel and clients.

- Discuss unconscious bias.
- Examine how to create and implement a culture to attract and retain top talent within your organization.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Human Resources Management
- CPE Field of Study: Personnel/HR

Speaker Info: Manar Morales

OM10: Transform Through Technology



Thursday, May 3 11:15 AM - 12:15 PM

You will identify the challenges — both practical and legal — of running small to midsize businesses. We'll examine the cost of mismanagement and look at attainable technology solutions to achieve success.

Objectives:

- Identify common missteps that employers make with data.
- Assess costs of simple, recurring mistakes.
- Recognize technology solutions that will transform your operations and anticipate their costs and ROI.
- Discover how to measure success.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category: Information Technology
- CLM App Management Category -FS: Operations Management
- CPE Field of Study: Information Technology

Speaker Info: Karen Kirkpatrick

CM11: Leadership: Do Men and Women Do It Differently?



Thursday, May 3 11:15 AM - 12:30 PM

Many firms and organizations have women's leadership programs. While such programs are necessary, they ignore the fact that the majority of partners — about 80 percent — and legal executives (about 78 percent; Chief Executive Officers are more than 95 percent) — are men. In order to change this dynamic, we must have a conversation with the decision-makers.

Objectives:

- Describe how and why women work differently — the neuroscience, evolutionary science and socialization behind gender.
- Evaluate our own implicit bias surrounding gender.
- Discuss and create solutions to address the gender gap.

Other Information:

- 75 Minutes
- Audience: Intermediate
- CLM App Management Category -FS:
- CPE Field of Study: Communications

Speaker Info: Kristen Knepper, JD

FM10: Modernizing Partner Compensation: Incentivizing the New Normal



Thursday, May 3 11:15 AM - 12:30 PM

In some law firms embracing project management, process improvement, and strategic pricing, leaders have observed that the partner compensation system hasn't kept pace and may not fully reward the new behaviors -- even when those behaviors are very profitable for the firm. For some leaders, this is a major understatement! In other law firms, lawyers resist change because of vague fears of disrupting quality or firm culture, but what they really fear is the loss of income. And some law firms have solved it:

embracing the new normal of efficiency requires adjustments to partner compensation, adjustments that better link quality, financial performance, and client satisfaction. Turns out, the new normal pays quite well.

This session will explore the typical resistance to change and delve into how compensation plans have been successfully adjusted and rolled out.

Objectives:

- Identify the root causes of partner resistance, even in the face of overwhelming market pressure to adapt.
- Learn how to employ "safe" methods to capture partner feedback on the current compensation plan and using this feedback to gain traction.
- Understand the critical links between firm and practice strategy and partner compensation, so what's right for the partner is what's right for the partnership.
- Become aware of the typical roadblocks, from poor data to outdated systems to a culture of privacy -- and how everyone from rainmakers to service partners to rising partners has both a valid beef and a need to get over it.
- Understand the pros and cons of the usual approaches to compensation redesign and rollout, from going too fast to going too slow

Other Information:

- 75 Minutes
- Audience: Advanced
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Finance

Speaker Info: Timothy B. Corcoran

HR11: Workplace Internal Investigations: A Novel Approach



Thursday, May 3 11:15 AM - 12:30 PM

If the truth isn't found in an investigation or inquiry, trust can wither and litigation risk can skyrocket. HR and legal management professionals often conduct investigations but receive limited training on this critical skill set. This presentation provides a proven phase-based process model, practical and actionable techniques, and critical insight for assessing, planning, understanding and completing investigations. The dynamic, multimedia presentation also leverages critical thinking and systems approach through an engaging story as we walk through the process.

Objectives:

- Review and apply an investigative model to make the best decisions with a systems approach.
- Apply critical thinking to ensure objectivity, focus on key information and withstand scrutiny.
- Identify comprehend the best practices and the common failures during investigations.
- Examine risk management from the clients' perspective and apply better guidance.

Other Information:

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

Speaker Info: Christine Cave & Max Dubroff

LI12: Business Insurance: Are You Covered?



Thursday, May 3 11:15 AM - 12:30 PM

With the many hats legal management professionals wear every day, insurance typically falls to the bottom of the stack. In this session, we'll explore areas of insurance that are often overlooked (key person coverage, business interruption evaluation, the importance of hired/non-owned auto for professional firms, workers' compensation updates, and so on). We'll also discuss how to determine appropriate limits for your firm and current trends in claims.

Objectives:

- Identify risks that face law firms that may not currently be addressed.
- Outline appropriate limits for coverage.
- Review current claim trends for the legal profession (outside of professional liability).

Other Information:

- 75 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Business Management & Organization

Speaker Info: Regan E. Katz

FM11: The Basic Principles of General Accounting



Thursday, May 3 11:15 AM - 12:45 PM

This session focuses on an introduction to accounting department duties, accounts payable process, accounts receivable process, general ledger, general ledger accounts, account types, cash versus accrual accounting methods, and fixed asset management. We will outline duties and processes in detail in the accounting department. There will be a review of the balance sheet and profit and loss statements so that you have an understanding of where account balances reside. We'll also discuss types of expenses and the importance of understanding the main expenses that affect a law firm. We will include a discussion of depreciation and some of the methods of applying depreciation.

Objectives:

- Develop an understanding of accounting department structure and responsibilities.
- Identify the main differences in cash versus accrual accounting.
- Recognize what types of accounts are on a balance sheet and profit and loss statement.
- Develop a clear process of accounts payable.
- Develop a clear process of accounts receivable.

Other Information:

- 90 Minutes
- Audience: Basic
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Finance

Speaker Info: Andrea L. Myers, CLM

LI11: Branding and Differentiation: Creating a Unique Message for Your Firm



Thursday, May 3 11:15 AM - 12:45 PM

It all flows from the message: What's your unique strategy? How will you stand out from the crowd? Your website is your 24/7 face to the world, your most important marketing tool. However, too many firms proclaim the same basic messages — quality, results, excellence or service. These limp platitudes are then illustrated by the obvious photography clichés of globes, columns, gavels, skylines and smiling lawyers. To succeed in today's tough economy, firms must do better. In this fast-paced hour, you'll learn how to develop your own unique strategy, blasting through dozens of differentiated messages and real-life examples of the best (and worst) law firm ads and websites, including a detailed case study. You will leave energized, educated and entertained, with a better understanding of how to differentiate your firm or practice.

Objectives:

- Describe why strategy is vital to the success of their marketing efforts.
- Discuss the primary differentiation strategies are for law firms.
- Identify your own unique message and how to sell it to your lawyers.
- Show to execute on it, including turning the message into a website.

Other Information:

- 90 Minutes
- Audience: Advanced
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Marketing

Speaker Info: Ross Fishman

BOLD Bites

BB10: When the Ball Has Been Dropped: How to Recover from a Botched Investigation

Thursday, May 3 1:45 PM - 2:00 PM

The call for help was desperate: "Please come fix our botched investigation!" Instead of acting like you have all the answers (because you don't), you confidently correct and complete the investigation, enabling your client to move forward while reducing their

risk. This session will focus on an all-new case study to illustrate another way to apply the phased-based model from "Workplace Internal Investigations: A Novel Approach." This insight will improve your ability to provide one-of-a-kind support to your clients.

Other Information:

- 15 Minutes

Speaker Info: Christine Cave & Max Dubroff

BB11: Mental Toughness: How it Works in the Real World and Why You Should Care

Thursday, May 3 2:00 PM - 2:15 PM

Mental toughness is seen as *the* key performance indicator by athletes and coaches across essentially every sport. Yet it's all but completely ignored in terms of our professional pursuits and daily lives — that's a mistake. We'll discuss the latest research around mental toughness, its application to the real world, and what you can do to encourage the process.

Other Information:

- 15 Minutes

Speaker Info: Brad Cooper & Suzanna Cooper

BB12: How to Handle Passive-Aggressive Personalities

Thursday, May 3 2:15 PM - 2:30 PM

Do you ever have challenging personalities in your firm that cause unnecessary upsets? This session will focus on how to effectively handle passive aggressive personalities and bullies in the workplace.

Other Information:

- 15 Minutes

Speaker Info: Jennifer Hill

BB13: Progressive Approaches to Occupancy

Thursday, May 3 2:30 PM - 2:45 PM

In today's legal workplace, hierarchical organization of office space — crowned by the ultimate reward of the corner office — reigns supreme. But as is true for any static institution that doesn't keep up with the changing times, a revolution is taking place. A growing list of pressures on law firms continues to build the case for more progressive approaches to occupancy. As other industries adopt increasingly flexible open office design approaches, it gives ample reason for cost-conscious, competitive law firms to pause and reflect: Is it time to evolve, or will the old order bear up under the pressure?

Other Information:

- 15 Minutes

Speaker Info: Marty Festenstein

HR13: The Importance of Drafting Effective and Accurate Employment Documents



Thursday, May 3 1:45 PM - 2:45 PM

Drafting effective and accurate employment documents is extremely important and beneficial to employees and employers alike. A well-drafted and accurate position description that is updated annually serves to place employees on notice of expectations and can be essential in defending against all kinds of employee claims. Additionally, position descriptions serve as the foundation for performance evaluations, helping to achieve optimal performance while rewarding and acknowledging past employee achievements. Accurate and honest performance evaluations help establish an employer's expectations, give employees an opportunity to improve their performance, and are critical in defending against employment-related claims. This presentation will also address the impact of position descriptions and evaluations in litigation, including before agencies and in court.

Objectives:

- Discover how drafting effective and accurate position descriptions and performance evaluations can help you.
- Review how to draft effective and accurate position descriptions and performance evaluations.
- Examine the impact of position descriptions and evaluations in litigation, including before agencies and in court.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category: Writing Skills
- CLM App Management Category -FS: Human Resources Management
- CPE Field of Study: Personnel/HR

Speaker Info: Thomas McCally

CM12: Learn to Use C-Suite Coaching Skills



Thursday, May 3 1:45 PM - 3:15 PM

Want to learn how to coach like an executive or professional coach? This presentation is for you. You'll learn ways to improve collaboration and get great results to complex problems by learning how to use the same five-step coaching model taught to managers and executives nationwide. Learn the tricks to using the coaching model, including when to use a particular step to clarify challenges and desired outcomes, how to manage 360 degrees, and how to foster more productive meetings. Participants will practice coaching on each other.

Objectives:

- Examine how to coach others using the five-step coaching model.
- Discover how to achieve greater commitment, accountability and focus on goals.
- Explain how to use coaching skills to turn no-win scenarios into win-win opportunities.

Other Information:

- 90 Minutes
- Audience: Advanced

- CLM App Management Category -FS:
- CPE Field of Study: Communications

Speaker Info: Anne Collier & Cynthia Shaffer

CM13: Energize Your Life



Thursday, May 3 1:45 PM - 3:15 PM

Today's fast-paced lifestyle requires a lot of energy! But there's a healthier, more effective approach than energy drinks, donuts and coffee. In this session, we'll cover how you can get more energy and maximize your health in today's hectic lifestyle. This content-rich, fun program will bring you up to speed on how to feel your best in the 21st century.

Objectives:

- Discover the three simple steps to powering up their personal health.
- Discuss how to decrease stress levels by what you choose to eat.
- Explain how to live more energetic and productive lives.

Other Information:

- 90 Minutes
- Audience: Intermediate
- CLM App Management Category -FS:
- CPE Field of Study: Personal Development

Speaker Info: David Meinz

FM12: Increase Your Knowledge of Banking and Investment



Thursday, May 3 1:45 PM - 3:15 PM

The second session of Law Firm Accounting Series focuses on improving your knowledge in the areas of banking and investments. We'll discuss bank account types, transfers and trust accounts as well as outline the types of options available to your firm.

Additionally, we'll identify reasons behind incorporating different types of bank accounts in your portfolio and discuss the importance of banking security features during the session.

Objectives:

- Examine the differences between bank account types.
- Identify bank security features that you can implement.
- Explain bank rules and regulations as to deposits.
- Identify the differences between wire and ACH transactions.
- Identify types of investment alternatives.

Other Information:

- 90 Minutes
- Audience: Basic
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Finance

Speaker Info: Andrea L. Myers

FM13: Going Timeless Workshop



Thursday, May 3 1:45 PM - 3:15 PM

Nothing impacts a law firm's profit as much as pricing does. In recent years, firms have been exposed to all types of billing and pricing models. However, most of these are still based on the "we sell time" mindset. This session will confront the conventional wisdom of the traditional law firm business model and expose the folly that you cannot run a successful law firm without recording time. By the end of the session, you'll have a much better business and pricing model — one that's been adopted by hundreds of professional firms all over the world — that frees lawyers from the restrictions and the deleterious effects of the billable hour and recording time. This interactive workshop will show you how you can run a timeless practice and will provide real-life insights into how some law firms have adopted and flourished under this new business model.

Objectives:

- Examine how billing by time is a suboptimal pricing model for good lawyers.
- Discover genuine alternatives to time-based billing that firms can use that are more strategic.
- Show that firms do not need to record time to run successful practices
- Demonstrate that making a move to a nontime-based pricing is not as difficult as what most think.

Other Information:

- 90 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Finance

Speaker Info: John Chisholm

HR12: Growing the Team: Know Thyself for Best Hiring Practices



Thursday, May 3 1:45 PM - 3:15 PM

What is your hiring practice? Do you use a dartboard, or do you hire with a purpose? Evaluating your team and knowing what makes them a great asset will decrease your hiring and subsequent firing woes down the road. Some of the questions we'll tackle include: What do you value in your team? What are their strengths and weaknesses? Are you hiring a clone or a disrupter? What is your goal with this new spend?

Objectives:

- Explain how to evaluate current team members.
- Examine if you should clone or disrupt.
- Formulate the right questions to achieve that objective.

Other Information:

- 90 Minutes
- Audience: Advanced
- CLM App Management Category: Organizational Development
- CLM App Management Category -FS: Human Resources Management
- CPE Field of Study: Personnel/HR

Speaker Info: Karen Kirkpatrick

LI14: Effective and Ethical Use of Social Media



Thursday, May 3 1:45 PM - 3:15 PM

Having an effective social media presence with relevant and regular content can help boost client retention and acquisition for law firms. Thousands of lawyers in all areas of practice are using social media tools for content marketing, reputation management, and to communicate with their clients and prospects. Social media offers law firms efficient and effective ways to engage and inform their target audiences on myriad topics. However, in order to be effective, lawyers must understand the benefits of social media and how to manage the risks of social media — responsibilities that often fall on the legal administrator. During this program, we'll address how legal management professionals can work with lawyers to develop a social media strategy and implement a social media campaign ethically and effectively for long-term success.

Objectives:

- Explain how to incorporate content marketing in a social media campaign.
- Identify tools to engage lawyers in content marketing and social media.
- Discover best practices for ethical and effective social media engagement.

Other Information:

- 90 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Marketing

Speaker Info: Gina F. Rubel

OM11: Are Law Firms Spending Their Money on the Wrong Areas of IT Security?



Thursday, May 3 1:45 PM - 3:15 PM

In this digital age of the cloud and software as a service (SaaS) deployments, more and more enterprise data is being created, transported, processed and stored outside of the corporate network boundaries. This makes traditional perimeter-based security controls and legacy network and endpoint protection solutions increasingly less relevant. This session will cover how law firms traditionally have been spending money to secure their networks. You'll learn about the data privacy and legal issues that may impact the way firms deal with their clients' data and third parties. We'll also examine how to implement

best practices to offset the data breach trend. Additionally, we'll explain ransomware and social engineering, and how firms can help their clients (and yourselves) understand and deal with the financial and business risks these threats represent.

Objectives:

- Review the traditional ways firms have been safeguarding their corporate network.
- Examine the various compliance and risk aspects of the business of law.
- Discuss the external and internal top cyberthreats.
- Identify practical ways to secure data from future threats.
- Define ransomware and social engineering.

Other Information:

- 90 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Operations Management
- CPE Field of Study: Information Technology

Speaker Info: Rob Kleeger & Khizar Sheikh

LI13: Using Design Thinking for Innovation in Legal Services



Thursday, May 3 1:45 PM - 5:00 PM

What if law firm leaders could master the design process to creatively develop new ways to deliver legal services and delight clients? What if law firms could regularly use the five steps of design (empathize, define, ideate, prototype and test) to create unique solutions that improved quality and reduced costs for their clients? This session will use Stanford's Design School (dSchool) process and tools to answers these questions and to teach design thinking. Participants will learn the basic concepts not by lecture, but by actually going through the design process in a fast-moving, intense 120-minute workshop. Tools available on the dSchool's website will be distributed, and some of the brainstorming and design process tools will be explained and tried in the session.

Objectives:

- Evaluate how the design process works and how it could be applied to your law firm.
- Apply these lessons in your law firm environment.
- Create something physical to represent the law firm's best ideas to gain empathy, understanding, explore new ideas, test and inspire others.

Other Information:

- 180 Minutes
- Audience: Advanced
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Business Management & Organization

Speaker Info: Mark Beese

LI15: A Law Firm's Competitive Edge: Writing Effective Business Continuity Plans

**Thursday, May 3 3:30 PM - 4:30 PM**

We all know that a comprehensively written business continuity plan is an essential part of your firm's business continuity program. Is your current plan gathering dust on a shelf? Are you struggling to put together a written plan that not only prepares your firm in the event of a disaster but also meets client compliance and audit requirements? What about request for proposal (RFP) guidelines? If so, then this session is for you. This hands-on session is for managers in any-sized firm. We'll work through a checklist of key components that should be a part of every written business continuity plan. You'll also receive a template that you can bring back to your office and customize for your firm.

Objectives:

- Explain the importance of having a written business continuity plan.
- Discuss why compliance issues, multiple client audits and RFP requests have changed the playing field for business continuity in the legal field.
- Identify the key/essential elements of a comprehensive business continuity plan.
- Apply the techniques discussed by completing a template that can be used by your office to write or enhance your firm's business continuity plan.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category: Writing Skills

- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Business Management & Organization

Speaker Info: Kathryn Scourby

LI17: Expanding Your Strategic Driver Practices: How Two Firms Nailed Strategy and Online Marketing



Thursday, May 3 3:30 PM - 4:30 PM

Every firm has practices that offer real leadership opportunities. They're dynamic and well led, or in a growing market segment. In larger firms, an industry group or specialty area can be spread across a range of offices and practices, impeding cross-selling. But two top firms figured out a solution. This presentation showcases the effective efforts of a large and small firm in targeting a practice and industry group for market dominance. Drinker Biddle sought growth in health care, although their lawyers were spread across 14 practices and 11 offices. This initiative helped them work together and cross-sell, founded upon powerful stories, a microsite and team retreat. Meanwhile, employment firm Laner Muchin sought to enhance their position in the restaurant industry and public sector. The initiative supported their in-person activities and built a brand that showcased their work, leading to more business opportunities.

Objectives:

- Identify the best practice or industry group to target.
- Write a marketing plan to execute the plan.
- Discuss how to persuade your firm's lawyers to work together.
- Use internet marketing tools to help execute the plan.
- Examine how to sell this to the firm.

Other Information:

- 60 Minutes
- Audience: Advanced
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Management Services

Speaker Info: Ross Fishman

HR14: The Future of Health Care in Today's and Tomorrow's Political Climate



Thursday, May 3 3:30 PM - 4:45 PM

This interactive and lively session will discuss the immediate and ongoing impact of a Republican president and Congress (as well as a potential Senate Super Majority for 2018). We will review potential replacements to the Affordable Health Care Act (ACA) as well as the aspects that are likely to remain intact, including but not limited to the Cadillac tax, individual mandate, and mandatory contraceptive coverage. We will briefly discuss potential Supreme Court nominees/nominations and their positions on varying aspects of the ACA and related laws. Human Resources Managers, Chief Executive Officers, Executive Directors and Administrators will benefit from insights gleaned from this presentation to implement employee benefit strategies at their firms.

Objectives:

- Develop forward-thinking strategies to present to management.
- Estimate and evaluate the potential financial impact of changes.
- Develop employee benefit programs that simultaneously accomplish the goal of creating a comprehensive, financially responsible program that fits employees' and management's needs.

Other Information:

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

Speaker Info: Mark Shore

OM12: The Case for Open Office Work Environments



Thursday, May 3 3:30 PM - 4:45 PM

In today's legal workplace, hierarchical organization of office space — crowned by the ultimate reward of the corner office for the highest-ranking attorneys —reigns supreme. But as is true for any static institution that doesn't keep up with the changing times, a revolution is taking place. A growing list of internal and external pressures on law firms continues to build the case for more progressive approaches to occupancy. Other industries are adopting increasingly flexible design approaches and Millennials continue to exert greater influence in the workplace. Such trends give cost-conscious, competitive law firms ample reason to pause and reflect: Is it time to evolve, or will the old order hold up under the pressure? We'll explore how your firm can adopt and embrace this new work environment and provide practical tips on how to transition your space.

Objectives:

- Analyze your current work environments to see how they compare to current legal workplace and office trends.
- Identify the various workplace solutions in law firms that feature workplace applications.
- Explain how creating an open office environment impacts real estate costs, collaboration, flexibility and provides overall value to a law firm.

Other Information:

- 75 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Finance

Speaker Info: Marty Festenstein

CM14: Creating an Empowered Environment



Thursday, May 3 3:30 PM - 5:00 PM

This session is designed as a follow-up to the "Changing Role of the Legal Secretary." Many managers approached me after that session and asked how they could create an empowered environment when implementing change. In this session, we'll train managers on conflict resolution, how to listen for their staff's greatness, and identify ways to shift the perspective of their employees — as well as their own perspective — so that everyone is empowered in the workplace.

Objectives:

- Recognize common obstacles and pitfalls when creating an empowering environment.
- Discuss how to respond rather than react.
- Identify ways to break free of the "drama triangle."
- Discover five ways to generate an indispensable and empowered team.
- Outline three quick ways to create an empowered environment.

Other Information:

- 90 Minutes
- Audience: Intermediate
- CLM App Management Category: Organizational Development
- CLM App Management Category -FS:
- CPE Field of Study: Communications

Speaker Info: Jennifer Hill

FM14: Improve Your Knowledge of Trust Accounting



Thursday, May 3 3:30 PM - 5:00 PM

Do you know how to handle advanced fees, retainers and real estate settlements as they relate to your trust account? This session will teach you all aspects of trust accounting from beginning to end. You'll advance your knowledge regarding the ABA Model Rules that affect the procedures related to trust accounting. You'll also gain a better understanding of the state trust account rules that also are relevant to your trust account process. Additionally, we'll review the process surrounding requirements of bank reconciliation of a trust account.

Objectives:

- Develop the procedures for a three-part reconciliation of the trust account.
- Identify situations that require segregated trust accounts.
- Identify the differences of advanced fees and retainers.
- Discuss and identify the relevant ABA Model Rules.

Other Information:

- 90 Minutes
- Audience: Basic
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Finance

Speaker Info: Lisa Dasher

HR15: The New Rules to Work-Life Balance



Thursday, May 3 3:30 PM - 5:00 PM

The most elusive state for today's high-performing professional is one of balance. Everybody wants it, but very few actually have it. Are we constantly searching for a singular point within our ever-changing world? Or are we just waiting for someone, something or the perfect time to become more balanced? Now — not if or when — is the time for each and every professional to take charge of understanding what creates balance, where to begin and how to stay on track to make a long-lasting change.

Objectives:

- Identify your top priority for creating personal/professional balance through simple assessment tools.
- Apply a two-force balancing philosophy to your work-life.
- Design values to direct long-term decision-making.
- Discuss a practical lifestyle model through diet, quiet, movement and happiness.

Other Information:

- 90 Minutes
- Audience: Intermediate
- CLM App Management Category -FS:
- CPE Field of Study: Personnel/HR

Speaker Info: Lance Breger

OM13: The Employee Wellness Dance: Marrying Individual and Organizational Priorities



Thursday, May 3 3:30 PM - 5:00 PM

Law firms are different. What works to enhance employee wellness in many industries is not effective in this industry. Whether you oversee your organization's employee wellness program or are outsourcing to a vendor, one of the greatest difficulties is balancing the competing priorities of the individual and the organization. Most employee wellness strategies lean heavily in one direction or the other, reducing effectiveness and outcomes. This program brings together two nationally recognized speakers — who also happen to be married — to provide practical ways in which the two sides of the coin can be successfully combined and integrated; no gavel necessary!

Objectives:

- Review how to create a strategy that will address the needs/goals of individuals.
- Create a strategy that will effectively meet the desired outcomes of the organization.
- Identify specific ways in which the two key components can move and flow as one in the overall approach to wellness.

Other Information:

- 90 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Operations Management
- CPE Field of Study: Business Management & Organization

Speaker Info: Brad Cooper & Suzanna Cooper

Friday, May 4

HR20: General Session: Driving Diversity Deep into the DNA of Your Organization



Friday, May 4 8:00 AM - 9:00 AM

As a former Diversity Officer for Headquarters Marine Corps and liaison to the Pentagon, Vernice Armour shares what it took to help a 200,000-personnel organization get back on track. We'll discuss how when you bring people together, you will have differences and similarities that result in tension and complexities — and this is completely normal. How you *manage* diversity is the key.

Objectives:

- Recognize who your people are and harness the power, skills and talents of the team.
- Show change as a new opportunity to sharpen current skill sets, learn and employ fresh techniques and accelerate your pace toward a collective goal.
- Use the power of employee resource groups (ERG) as a game-changing tool.
- Formulate cultural evolution by empowering everyone to be an ambassador for transformational management and execution.
- Create and strengthen a culture that values and respects *all* team members.

Other Information:

- 60 Minutes
- Audience: Basic
- CLM App Management Category: Organizational Development
- CLM App Management Category -FS: Human Resources Management
- CPE Field of Study: Personnel/HR

Speaker Info: Vernice Armour

LI20: Building Accountability into Your Culture



Friday, May 4 10:30 AM - 11:30 AM

Accountability is an essential part of leadership and management. In fact, without it, there is no way to establish credibility and trust among team members. It is so important that employees are held accountable for their work, individually and as part of a team. It is only when everyone in an organization is held accountable does accountability become part of a culture. But, it does not stop there — creating the culture is one thing, but maintaining it is another. This session will discuss ways to use expectations, reviews, incentives and your company values to maintain a culture of accountability.

Objectives:

- Discuss the value of a firm culture that embraces accountability.
- Identify effective ways to hold people accountable.
- Explain how to leverage the employee feedback loop to emphasize accountability.

Other Information:

- 60 Minutes
- Audience: Basic
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Business Management & Organization

Speaker Info: Debbie Foster

LI21: You're Fired: Why the Managing Partner Might Ax You Soon



Friday, May 4 10:30 AM - 11:30 AM

It's no secret that the world of law firms is changing at the speed of light. It's also no secret to managing partners that demands on administrators are changing rapidly, too. If you don't change to update your skills and constantly become more valuable to your firm, you might be next. Come learn the "new normal" for firm administrators of the future.

Objectives:

- Examine law firm trends that affect all law firm leadership positions.
- Discuss what specific skills are expected of firm leadership.
- Identify the most important skill sets that you can develop to make you valuable to your firm and beyond in the job market.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Management Advisory Services

Speaker Info: Uri Gutfreund

OM21: You Are Merging — Now What?

**Friday, May 4 10:30 AM - 11:30 AM**

This session will deal with how best to integrate the administrative functions of two law firms. We'll also discuss the value of best practices and how to choose among legacy software and procedures.

Objectives:

- Discuss how to better handle integration of different administrative support structures.
- Discover how to emerge with a leaner, more efficient and less costly administrative structure.

Other Information:

- 60 Minutes
- Audience: Advanced
- CLM App Management Category: Organizational Development
- CLM App Management Category -FS: Operations Management
- CPE Field of Study: Business Management & Organization

Speaker Info: P. Douglas Benson & Mark Santiago

FM21: Funding Your Office Renovation, Relocation or Remodel



Friday, May 4 10:30 AM - 11:45 AM

Expanding, updating or making a change to your office space requires a tremendous investment of time and money. Often your landlord will provide a tenant improvement allowance that does not cover the entire cost of your project. As your firm is preparing for a change, it is important to consider the different funding options available. This session will examine the impacts of a lease as compared to traditional financing for your leasehold improvements, furniture, and office and technology equipment. It will detail the accounting and tax considerations, outline the typical funding process, and consider in detail which terms and conditions will affect the logistics and economics of the financing. After attending this session, you'll be more knowledgeable and capable of considering lease and finance options to manage business expansions, office moves and technology upgrades.

Objectives:

- Examine funding options available for expenses above and beyond landlord's tenant improvement allowance.
- Analyze accounting and tax considerations when financing office projects
- Outline the impact of terms and conditions to better negotiate lease and finance contracts.
- Discuss industry-specific case studies.

Other Information:

- 75 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Business Management & Organization

Speaker Info: Christina Floyd & Karen Leastman

LWIIE: Leading with Inclusion Idea Exchange

Friday, May 4 10:30 AM - 11:45 AM

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.

CM20: Building Trust and Respect in the Law Firm Through Understanding Behavior Styles



Friday, May 4 10:30 AM - Noon

This interactive workshop explores the four spectrums of human behavior and reveals how attorneys, legal management professionals, managers and employees can use the behavior styles theory to increase trust, respect and morale in their law firm. In this session, you'll examine the ways people process information (think to talk versus talk to think), display emotion, make connections, deal with change and handle conflict. You'll also identify your own style combination before learning ways to identify the style of others. This helps us "get" one another (understanding plus empathy), and enables us to see where and how we can make slight adjustments in our own style to better meet the needs of those around us.

Objectives:

- Discover and gain an appreciation for your own behavior style combination.
- Develop a better understanding of your general impact on others.
- See the importance of — and specifically how — to adjust styles slightly to better meet the needs of others.
- Identify different behavior styles among employees.
- Recognize signs of stress and burnout by noticing an individual's behavior style cues.

Other Information:

- 90 Minutes
- Audience: Advanced
- CLM App Management Category: Communication Skills
- CLM App Management Category -FS:
- CPE Field of Study: Communications

Speaker Info: Michael Nash

FM20: Insights into Special Accounting Issues



Friday, May 4 10:30 AM - Noon

In this session, we'll bring to light various special issues related to different facets of a law firm accounting department. Are you intimidated by discussions of alternative fee arrangements? Do you need to further your understanding of electronic billing? Are you looking for a new accounting system? Is your collections workflow in need of an update? Take this opportunity to learn about these pieces of the accounting puzzle.

Objectives:

- Identify different types of alternative fee arrangement models.
- Outline important features in a billing and timekeeping system.
- Discuss features in electronic billing that can benefit your firm.
- Outline of the goals of electronic billing.
- Define the steps in the collection process and begin to develop your policy.

Other Information:

- 90 Minutes
- Audience: Basic
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Finance

Speaker Info: Lisa Dasher

HR21: Developing an Associate-Marketing Training Program



Friday, May 4 10:30 AM - Noon

The legal economy is growing and law firms are again focusing on training and retaining their associates. Progressive law firms want to help their associates become next-generation rainmakers, and find that associates stay longer at firms that provide professional skills training. Of course, first-year lawyers should undertake different activities than seventh-years, which makes it difficult to provide a customized education. In this presentation, we'll lay out a step-by-step, year-by-year program for how firms can turn their associates into rainmakers and give a detailed plan for the specific marketing activities associates should undertake at each stage of their career. Additionally, we'll cover how to create your own effective internal educational program. Each attendee will receive a free copy of the presenter's book, *The Ultimate Law Firm Associate's Marketing Checklist*.

Objectives:

- Examine the decade-long arc of associate-marketing development.

- Identify what marketing activities associates should undertake at each stage of their career.
- Discover the single activity that is the greatest predictor of rainmaking success.
- Show how to develop your own internal training program.

Other Information:

- 90 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Human Resources Management
- CPE Field of Study: Personnel/HR

Speaker Info: Ross Fishman

HR22: Performance Appraisals in Law Firms: Yes, They Do Matter



Friday, May 4 10:30 AM - Noon

Now more than ever, letting your employees know how they are performing is one of the most important aspects of any law firm manager's job. Whether a partner, shareholder, member, associate, manager or supervisor, those with evaluation responsibilities in law firms absolutely *must* take the process seriously and understand the implications — both legal and employee relations — from the failure to do so. Whether the employee is doing a great job or needs significant improvement, it is critical that those with evaluation responsibilities know how to appropriately document the employee's performance and realize the importance of carefully drafting the appraisal.

Objectives:

- Examine how appraisals have changed and why appraisals (in whatever form) are so critically important.
- Describe the appraisal drafting process and identify common mistakes made.
- Identify the very real legal risks associated with a rushed, poorly worded or not-delivered appraisal.

Other Information:

- 90 Minutes
- Audience: Advanced
- CLM App Management Category -FS: Human Resources Management

- CPE Field of Study: Personnel/HR

Speaker Info: Michael S. Cohen

OM20: Preventing Workplace Violence – Managing the Troubled Employee



Friday, May 4 10:30 AM - Noon

Presented by lead legal counsel for several Fortune 500 threat management teams, this program is a multidisciplinary examination of best practices concerning workplace violence prevention. We'll examine behavioral, legal and managerial considerations, with a specific emphasis on the role of the human resources within the workplace violence prevention team structure. Additionally, we'll review law and policy concerning social media monitoring, recent disability law developments concerning troubled employees, and the termination of dangerous individuals.

Objectives:

- Review composition and training of a workplace violence prevention team led by a human resources professional.
- Examine behavioral warning signs and escalating risk factors, including the nexus between bullying and violence.
- Review disability law and accommodation of the troubled employee.
- Outline key considerations in separating the threatening employee safely and legally.
- Explain legal issues concerning social media monitoring of threatening individuals.

Other Information:

- 90 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Operations Management
- CPE Field of Study: Business Management & Organization

Speaker Info: Glen Kraemer

HRIE: Human Resources Idea Exchange

Friday, May 4 10:30 AM - Noon

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.

CM21: Laugh to the Top: A Hilarious Guide to Achieving Your Goals



Friday, May 4 2:15 PM - 3:15 PM

This entertaining, thought-provoking presentation is packed with practical, proven techniques for setting, pursuing and achieving both professional and personal goals. It will inspire you to attack your objectives with a renewed fire, determination and focus. In this seven-step guide, we'll cover everything from controlling stress to taking bold action. Additionally, we'll discuss how far diligent baby steps can take you, how to maintain a positive attitude and sense of humor during the direst of circumstances, and how to dissolve that knot of fear when you're venturing into unknown and frightening territory. The audience will laugh as they learn that nothing can prevent them from making themselves and their organizations the very best they can be.

Objectives:

- Discuss simple techniques for cutting your stress levels.
- Demonstrate how small, incremental steps toward a goal can lead to triumph.
- Discover the tangible, practical benefits of a positive attitude and sense of humor.
- Examine practical tools for setting goals, writing plans, making binding contracts, taking bold action, and refining your techniques to achieve your goals.

Other Information:

- 60 Minutes
- Audience: Basic
- CLM App Management Category: Self-Management Skills
- CLM App Management Category -FS:
- CPE Field of Study: Personal Development

Speaker Info: Mack Dryden

CM22: People, Process and Change Management



Friday, May 4 2:15 PM - 3:15 PM

When it comes to maximizing efficiency in your firm, one of the biggest obstacles is the change itself. Change is hard, but necessary for businesses to thrive and survive. In order to properly implement change, we must take the time to understand how work gets done. This session will take you through the value of understanding current processes and undertaking the necessary steps to recognize the changes that need to be made. We'll also address the *why* behind those changes, and what you need to do to make that change become a reality. Likewise, we will discuss the people side of the equation, understanding that people continue to be our most valuable asset, and, therefore, should be where we invest our time and energy.

Objectives:

- Outline the value of process when it comes to getting work done.
- Examine ways to present change so that people are encouraged to support it.
- Explain the value of managing change.

Other Information:

- 60 Minutes
- Audience: Basic
- CLM App Management Category -FS:
- CPE Field of Study: Business Management & Organization

Speaker Info: Debbie Foster

FM22: How to Plan for a Personal, Successful Retirement



Friday, May 4 2:15 PM - 3:15 PM

Americans are living longer, healthier lives more than ever before and we are doing more in our retirement years. Whether you have 20 years or two years to go until retirement, one thing we all have in common is our desire to retire and experience financial independence. Attend this presentation and learn how you can improve your retirement strategy to help you create a successful, fulfilling retirement.

Objectives:

- Breakdown the first four steps to financial success.
- Identify key concerns and risks many individuals face when it comes to planning for a successful retirement.

- Explain why your "rate of savings" is more important than the "rate of return" on your investments.
- Identify the "real" cost of retirement: prevent yourself from making costly mistakes with your retirement nest egg that could jeopardize your retirement lifestyle.
- Discover the answers to seven retirement planning questions using only your age and income.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Finance

Speaker Info: Darren Stranerio

FM23: Beyond Financial Reporting – Demonstrate Value, Increase Credibility, and Become a Trusted Adviser to Partners and the Management Team



Friday, May 4 2:15 PM - 3:15 PM

A reliable legal management professional is essential to managing a successful law firm. How do you make sure that *your* value is known to the leaders of your firm? The numerous spinning plates in the back-office of a business are vital — when one drops, everyone hears about it. When everything goes as it should, no one notices. The key to having your value noticed is to keep all your plates spinning on one hand, while also maintaining a strategic conversation with the partners on the other. We'll examine the six topics you can focus on to improve communication and increase the trust in your role as adviser to the management team and partners.

Objectives:

- Discover how to avoid your defensive mode to open-up communication and correct problems and moving forward.
- Discuss how to put the most vital topics all on one page so attorneys can glance at the info in a single place.
- Show how bringing facts and research studies to the attorneys can help make your case for myriad decisions.

- Outline how to add a summary to your reports with meaningful bits of information.
- Identify how to calculate the profits-per-partner.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Finance

Speaker Info: Rebecca Haack

HR23: Examining the Latest in Updates in HR Law



Friday, May 4 2:15 PM - 3:15 PM

Learn about the latest and key updates in employment law and the potential impact these changes could have on your organization. We will examine recent, significant legislation and court decisions, as well as administration directives as they relate to the U.S. Department of Labor, Flexible Spending Accounts and the Equal Employment Opportunity Commission. In addition, we'll look at how employment rights activists are targeting regulation at the state level, including the proliferation of paid sick leave ordinances in a growing number of jurisdictions, which could affect your organization.

Objectives:

- Examine ways to ensure your organization stays current with the latest developments in the laws affecting employees.
- Give examples of takeaways that will enable you to update your firm's policies and procedures.
- Review other changes may be coming from the Trump administration.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Human Resources Management
- CPE Field of Study: Personnel/HR

Speaker Info: David Michael

LI22: First 400 Days of Trump Administration: Interactive Analysis of Impact on Your Firm and Real Estate



Friday, May 4 2:15 PM - 3:15 PM

We will run this presentation as a live polling session to obtain an interactive audience experience. JLL, a real estate firm, will handle the polling function, which promises to be easy to use. Presenters will ask the audience a question, give the poll result, and then give JLL's thought leadership and economic forecast to compare and contrast. We'll continue with this format through a number of questions related to our topic. Questions will include: A year and a half into the Trump presidency, what have been the surprises, challenges, opportunities for the law firm industry and what do we expect in the future?

Objectives:

- Discuss the impact the Trump administration has on the legal industry.
- Identify opportunities for the legal industry in the near future under this administration.
- Examine the financial impact of the administration on your firm.
- Recognize changes should your firm be prepared to make in response to enacted or expected Trump administration policies.
- Review what has been the most noticeable impact on the real estate markets you operate in as a result of the Trump administration.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Business Management & Organization

Speaker Info: Ben Breslau & Elizabeth Cooper

LI23: The Rising Tide of Pay Claims: How the Wave of Law Firm Litigation is Bringing Attention to Pay Gap



Friday, May 4 2:15 PM - 3:30 PM

After years of lagging behind on pay equity, the legal industry has reached a tipping point. In an emerging trend, female partners are bringing lawsuits accusing firms of gender bias in their pay practices. And these suits are not limited to the world of Big Law. Female prosecutors, law professors and city attorneys are joining in. Legal employers cannot afford to assume that women attorneys or partners won't sue. With greater awareness of equal pay — combined with a wave of new, aggressive state fair pay laws that make it easier to bring and win systemic pay discrimination claims — the legal industry faces the prospect of a rising tide of equal pay claims. How should you respond to protect your organization? Join us for this program where we'll discuss the increased focus on pay equity, including the practical means for assessing those risks, conducting privileged proactive pay analyses, and addressing potential problem areas.

Objectives:

- Summarize recent trends in pay equity lawsuits in the legal industry.
- Discuss the 20-plus states that have proposed or are expected to pass aggressive fair pay laws in the near future.
- Point out the challenges for employers operating in multiple states under a patchwork of differing, and often contrasting, laws.
- Outline how to conduct a privileged review of your pay systems to proactively identify and eliminate unexplained pay equity disparities.

Other Information:

- 75 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Business Management & Organization

Speaker Info: Mickey Silberman

OM22: Why Today's Impatient, Impulsive and Intolerant Clients Are Leaving Your Law Firm



Friday, May 4 2:15 PM - 3:30 PM

More than ever, today's customers are inundated with good choices. Outdated notions of loyalty and service are ignoring the profound market shift that is driving too many

customers to your competitors. So, how do you win their business when patience is short and alternatives are only a short drive or a click away? In this hard-hitting and entertaining presentation, we'll shine a light on this monumental shift in buyer behavior and expectation, while showing your team everyone's role in eliminating barriers, engaging customers, educating prospects and building your brand.

Objectives:

- Examine all the choices available from the customers' perspective.
- Discuss how stories of lost opportunities at every level reach the masses and why it matters.
- Recognize how missed moments and maddening policies are contributing to lost sales and negative reviews.
- Discover why differentiation trumps competency and connection earns sales.

Other Information:

- 75 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Operations Management
- CPE Field of Study: Business Management & Organization

Speaker Info: David Avrin

BOLD Bites

BB20: The Termination Event: Don't Screw It Up

Friday, May 4 2:15 PM - 2:30 PM

One of the worst parts of any legal manager's job is having to terminate staff. However, it is incredibly important that the process goes smoothly and in a way that minimizes potential liability to your firm. Regardless of the individual's position within your firm, there are certain strategies that apply to preparing for and participating in the termination meeting. This session will discuss steps we must take in preparing for the termination, as well as mistakes commonly made prior to and during the meeting itself.

Other Information:

- 15 Minutes

Speaker Info: Michael S. Cohen, JD

BB21: Culture and Teamwork: The Good, the Bad and How To Fix It

Friday, May 4 2:30 PM - 2:45 PM

How do you define a firm's culture? Culture is the sum total of all the "this is the way we do it." But it's not just about how a firm approves business-development expenditures or whether it is boisterous or reserved. More broadly, culture is about how people work together — it's about teamwork. Analyzing a firm in terms of a five-step model for creating effective teamwork — with a focus on dominant problem-solving style — does more than label its culture as good or bad; it provides a framework for understanding what isn't quite working and how to fix it.

Other Information:

- 15 Minutes

Speaker Info: Anne Collier

BB22: Let's Talk About Sex(ual Harassment Prevention)

Friday, May 4 2:45 PM - 3:00 PM

Unless you've been living under an extremely heavy rock, you have seen the absolute explosion of sexual harassment claims proliferating every industry. Law firms are not immune from these issues, and the claims that inevitably are brought against firms that allow hostile work environments to exist. What can legal managers do? This session will examine the problem and provide practical steps that your firm can take to prevent inappropriate conduct and to correct it promptly when it does occur.

Other Information:

- 15 Minutes

Speaker Info: Michael S. Cohen, JD

BB23: The Next Frontier: Harnessing Cognitive Diversity

Friday, May 4 3:00 PM - 3:15 PM

Does your firm feel stalled? You're not quite sure why, but you know it has something to do with the failure to leverage the collective talent of the firm's employees. What if you better understood creativity and problem-solving styles? By doing so, instead of being put off, dismissive and perhaps even fearful of those with different problem-solving styles, you can learn to embrace the perspectives that such differences offer. Imagine being able to solve problems more efficiently and effectively. This is your opportunity to learn how to recognize different problem-solving styles, transforming annoyance into appreciation.

Other Information:

- 15 Minutes

Speaker Info: Anne Collier

CP/GVIE: Corporate and Government Idea Exchange

Friday, May 4 3:45 PM - 5:45 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.

HR25: Difficult Conversations With Your Difficult Employees



Friday, May 4 4:15 PM - 5:15 PM

Do you sometimes find yourself dealing with bickering employees or the workplace bully? Learn how to avoid the traps employees can set, particularly when they are

coached or encouraged by others and ways to deal with such issues head-on, directly confronting the issues in ways that are both legal and effective. This session addresses how to create an atmosphere designed to encourage employees to recognize problems, tell the truth and get to a resolution.

Objectives:

- Discuss policies and procedures that should be in place to combat bullying.
- Identify proper and improper communications in varying bullying scenarios.
- Examine exposures employers face to legal liability under many different theories.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category: Communication Skills
- CLM App Management Category -FS:
- CPE Field of Study: Communications

Speaker Info: Candice C. Pinares-Baez, JD

LI25: Leadership and Management: Why You Need Both



Friday, May 4 4:15 PM - 5:15 PM

You have probably heard this quote by Peter Drucker: "Management is doing things right; leadership is doing the right things." While that is certainly a great quote, there is more to it than that. To improve the leadership and management at our firms, we must understand the difference between the two, and the importance of investing our time and energy to have better leaders and managers. This session will explore the differences and give you practical tips to help you become a better leader and manager.

Objectives:

- Examine the difference between leadership and management.
- Recognize how to be a more effective leader.
- Identify tools to help you connect with others.

Other Information:

- 60 Minutes
- Audience: Basic

- CLM App Management Category: Organizational Development
- CPE Field of Study: Business Management & Organization

Speaker Info: Debbie Foster

OM23: Pilot a Web-Based App to Discover the Best Workplace Scenario for Your Firm



Friday, May 4 4:15 PM - 5:15 PM

Law firm management professionals faced with overseeing the design of new workplace environments that increase efficiency and lower real estate costs — both quantitative measures — have been relatively easy to model. In contrast, the qualitative aspects that various operational scenarios have on the firm, its people and culture often go unmeasured. Convention says rely on design trends and what other law firms have done as guideposts. Until now, you've likely defaulted to these trends with the hope they are keeping up with the industry standard. Imagine if there was a tool that would challenge assumptions, eliminate hypotheticals, and visualize scenarios in real-time to allow you to see both the quantitative and, importantly, the qualitative effects of operational scenarios and new workplace design. We'll show a new web-based application that helps you visualize the qualitative implications of various workplace scenarios to better inform your decision-making.

Objectives:

- Discuss how to measure the qualitative effects of law firm design trends regarding culture, attraction, retention Millennial appeal, and more.
- Discover techniques and approaches for prioritizing critical qualities and strategic variables required for law firms to produce more successful workplaces.
- Examine how to model operational futures that align with your law firm's strategic objectives.

Other Information:

- 60 Minutes
- Audience: Advanced
- CLM App Management Category -FS: Operations Management
- CPE Field of Study: Business Management & Organization

Speaker Info: Elizabeth Cooper & Steve Polo

OM24: Please Rise: How to Apply Today's Sit/Stand Trend to the Modern Legal Workplace



Friday, May 4 4:15 PM - 5:15 PM

In this session, we'll explore key research findings on the benefits of sit-to-stand workstations and offer guidance on how best to integrate postural variation into any work environment. We'll cover topics such as how frequently you should stand throughout the day and how much adjustability is required. We'll also discuss the health implications associated with prolonged standing. Additionally, we'll review guidelines on practical implementation strategies for both new and established workplace environments and address common pitfalls that occur during implementation. These will come from the perspective of a national law firm that has implemented sit/stand through recent projects. We'll also discuss special planning details to consider unique to the nature of legal work.

Objectives:

- Analyze costs and health effects of workplace-related musculoskeletal discomfort.
- Identify how ergonomics and movement can have a positive impact on injury rates, productivity and return on investment.
- Relate success strategies from a national law firm that implemented sit/stand in the legal workplace.

Other Information:

- 60 Minutes
- Audience: Basic
- CLM App Management Category -FS: Operations Management
- CPE Field of Study: Business Management & Organization

Speaker Info: Sacha Burn & Michelle Terry

CM23: The Win-Win-Win Experience: Bridge the Gaps for Team Success



Friday, May 4 4:15 PM - 5:30 PM

During this general session keynote presentation, Kristen Brown will help you shift your thinking to create deeper connections with others so everyone is successful. When you help others succeed, your own success levels rise, too. But what does it take to step away from your own self-focused mindset and help those around you before helping yourself? Human nature prompts us to look out for No. 1 first — and that can serve us well in many cases. But to be an empowering leader and trusted team member who drives growth, or to be a high-performer who consistently exceeds expectations, you must step away from the me-first mentality. Instead, focus on those around you. When you embrace this paradigm shift it's a win-win-win for you, your team and your organization.

Objectives:

- Discover how your mindset and presence impacts your workplace success.
- Examine how to shift your thinking and behavior so you are viewed more positively.
- Create new ways to build a connection with your team so everyone wins.

Other Information:

- 75 Minutes
- Audience: Intermediate
- CLM App Management Category -FS:
- CPE Field of Study: Communications

Speaker Info: Kristen Brown

CM24: Adapt or Perish: Understanding the Emotion of Web Video



Friday, May 4 4:15 PM - 5:30 PM

If a picture is worth a thousand words, then what is a video worth? Video is more powerful than ever before. In fact, Cisco reports that 80 percent of the web will be video in 2018. In this session, you'll learn the types of videos that benefit law firms the most. We'll also examine why "about me" videos are a bad idea and discuss why educating consumers is what leads to action. We'll cover how video impacts your Google rank, as well as the value of YouTube.

Objectives:

- Outline the importance of online relationships.
- Examine how YouTube is used by major law firms and Fortune 500s and explain why you need to be using it, too.
- Review how web video should be used.
- Identify the types of video that work best for your firm.

Other Information:

- 75 Minutes
- Audience: Advanced
- CLM App Management Category -FS:
- CPE Field of Study: Communications

Speaker Info: Corey Saban

FM24: Tax Update: Legislative Developments and Tax Planning for Law Firms and Attorneys



Friday, May 4 4:15 PM - 5:30 PM

This session will focus on the latest developments in the tax law and the impact of these changes to the profession. We'll emphasize tax planning strategies for both law firms and individual attorneys. Additionally, we'll cover why it's always important for businesses and individuals to understand the tax implications of their business activities and be proactive in tax planning. For example, entity and ownership structure can impact these strategies. We will review the pros and cons of each structure and how the tax laws impact each. We'll also look at a variety of tax savings ideas for law firms and will provide insights into tax and wealth planning tips for individual partners.

Objectives:

- Identify the latest developments in the tax laws and the related impact on law firms and individual attorneys.
- Examine different entity choices for law firms and the related tax impact of each structure.
- Discuss tax planning strategies for law firms.
- Review tax and wealth planning tips for law firm owners/partners.

Other Information:

- 75 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Finance

Speaker Info: Kristin Bettorf

SSSIE: Secretarial Support Strategies Idea Exchange

Friday, May 4 4:15 PM - 5:30 PM

What will we do when our secretaries retire? Where will we find the latest and greatest secretaries? The answers are right here with your ALA peers. Join your fellow ALA members for an idea exchange to problem solve the pipeline of legal secretaries. We will explore alternative models such as secretarial teams including team captains and junior secretaries to file clerks and job sharing. The role of the legal secretary has changed; what can we do as legal professionals to enhance this position. This is a session you do not want to miss.

FM25: The Ins and Outs of Payroll, Taxes and Reporting



Friday, May 4 4:15 PM - 5:45 PM

Have you ever had to calculate and produce a payroll check without the use of payroll software? If not, you will have the skills after attending this session as we focus on payroll from beginning to end. It is important to understand all aspects of deductions and taxes being withheld from paychecks. We'll also cover the specific rules related to the Employee Retirement Income Security Act of 1974 (ERISA) requirements and employee deductions.

Objectives:

- Identify what types of payroll taxes affect a check.
- Examine how to read and use IRS Circular E.
- Identify reporting requirements for the Affordable Care Act.
- Analyze the criteria related to ERISA remittance requirements.

- Explain the most common types of payroll deductions.

Other Information:

- 90 Minutes
- Audience: Basic
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Finance

Speaker Info: Lisa Waligorski, CLM

HR26: Accommodations and Leaves of Absence: Law Firms Confronting the FMLA and ADA



Friday, May 4 4:15 PM - 5:45 PM

When a law firm employee needs time away from work for an illness or injury, or after the birth of a child, the employee is concerned about two things: 1) Will I still have my job? and 2) Will I get paid while I am away? Correctly answering these questions requires a law firm employer to master the interplay of laws governing leaves of absence, including the Family and Medical Leave Act (FMLA); the Americans with Disabilities Act (ADA); and insurance programs, such as short-term disability and workers' compensation benefits.

Objectives:

- Identify best practices for coordinating these obligations.
- Discuss one of the most challenging FMLA administration issues —intermittent FMLA absences.
- Explain how manager frustration with unanticipated absences due to chronic conditions can lead to increased legal risks when managers are unaware of their obligations under the FMLA.
- Examine how employee abuse of intermittent FMLA leave lowers coworkers' moral and negatively impacts operational efficiencies.

Other Information:

- 90 Minutes

- Audience: Intermediate
- CLM App Management Category -FS: Human Resources Management
- CPE Field of Study: Personal Development

Speaker Info: Michael S. Cohen, JD

Saturday, May 5

HR31: Marijuana in the Workplace Practicum Workshop



Saturday, May 5 8:00 AM - 9:30 AM

Although it is a natural addendum to the "Marijuana in the Workplace" presentation at the 2017 ALA Annual Conference, this interactive workshop is recommended for all conference attendees. You'll break out into problem-solving groups and be presented with several fact scenarios regarding the use of marijuana in the workplace. The groups will be asked to identify the issues and analyze the applicable laws and then share resolutions and recommendations. The fact patterns will address the Americans with Disabilities Act; drug testing; and various laws, including marijuana, employment, awful activities, and workers' compensation.

Objectives:

- Identify marijuana in the workplace issues.
- Apply laws impacting marijuana use in the workplace.
- Explain the problem-solving process and render recommendations to your colleagues on how to address marijuana use in the workplace.

Other Information:

- 90 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Human Resources Management
- CPE Field of Study: Personnel/HR

Speaker Info: Judge Mary A. Celeste (ret.)

CM30: Relationship Networking: Building Personal Connections for Professional Results



Saturday, May 5 8:15 AM - 9:30 AM

Follow-up is the foundation for building a thriving network and business. Often, we are too busy to focus on building and nurturing our relationships. Some of us may find follow-up awkward, uncomfortable or even unwanted. As a result, we find it difficult to move from one conversation to the next, to build upon the initial contact and turn it into a real relationship. And even if you do this with ease, there are a variety of powerful approaches for increasing your contact with and the value you provide to your network. During this session, we'll examine tips and tactics that will help you convert your conversations into stronger and longer connections. At the end of the day, it is the strength of your relationships that leads to your success.

Objectives:

- Discuss how to move from the first conversation to a lasting connection.
- Illustrate how to leverage technology and social media in simple ways to increase familiarity.
- Discover specific ways to increase your value to your network.
- Recognize the power of patience.
- Identify ways to ask for something and get results.

Other Information:

- 75 Minutes
- Audience: Intermediate
- CLM App Management Category -FS:
- CPE Field of Study: Communications

Speaker Info: Michelle Tillis Lederman

FM30: Advanced 401(k) Planning and Strategies



Saturday, May 5 8:15 AM - 9:30 AM

This session is directed toward those who manage the firm's 401(k), profit sharing and cash balance plans. This structured discussion will facilitate communication regarding best practices, positioning and what results in a successful retirement outcome for the firm's employees. We'll also discuss how the 401(k) plan is evolving.

Objectives:

- Identify the correct plan design most appropriate for their firm.
- Determine if or when a cash balance plan would make sense as an additional benefit.
- Explain the current 401(k) plan's benefits in a more effective manner to the firm's staff.
- Determine if and when a plan transition to a replacement would be prudent.

Other Information:

- 75 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Finance

Speaker Info: Spencer X. Smith

FM31: Profit Planning and Cost Accounting for Law Firms



Saturday, May 5 8:15 AM - 9:30 AM

Most law firms do not believe that cost accounting applies to them, that it applies only to other industries like manufacturing. However, it is crucial for all law firms to implement a cost accounting system to understand their own business. How can you tell if a client, producer, division or office is profitable? Cost accounting can provide you with the answers to those questions. Many law firms face the same challenges when making management decisions, such as allocating overhead and establishing billing rates. These challenges can be overcome by understanding the costs associated with each producer. After understanding your firm's costs, all law firms should establish a profit plan. In this workshop, you'll get a hands-on learning experience that will teach you the fundamentals of understanding cost accounting as it relates to law firms. You'll also learn the practical steps it takes to create a profit plan that works toward your firm's revenue goals.

Objectives:

- Illustrate how to implement a cost accounting system.
- Show how to establish cost-per-hour for each producer.

- Identify profitability by producer, client, division and office.
- Examine how to establish a profit plan for a law firm.

Other Information:

- 75 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Finance

Speaker Info: Samuel J. Catanese, CPA

LI30: Aligning Your Stars: Succession Planning for the Administrative Team



Saturday, May 5 8:15 AM - 9:30 AM

How will your firm replace that senior billing manager who handles conflict checks and invoicing when they retire? How about the collection specialist who knows everything about your client database? Is your firm addressing the evolving role of the legal administrative assistant? Current demographics in most law firms, regardless of size, now make succession planning a critical issue. You need specific strategies to transfer critical operational knowledge of day-to-day responsibilities among various staff positions. You need an effective plan to overcome the challenges of filling key positions when members of your senior administrative team retire. Those firms who respond now will create a competitive advantage for the future.

Objectives:

- Identify demographic and economic trends that require succession planning.
- Identify critical steps for effective succession planning.
- Create training programs to cross train and develop individuals to succeed others.
- Discuss current best practices among law firms of various sizes.

Other Information:

- 75 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Business Management & Organization

Speaker Info: Michael Moore

OM30: Responding to Client Cybersecurity Questionnaires



Saturday, May 5 8:15 AM - 9:30 AM

Law firms are facing increasing pressure from clients to demonstrate compliance with regulatory requirements and industry best practices for protecting confidential information against data breaches. Being prepared to respond to cybersecurity questionnaires from key clients or auditors has become an important part of the business of law. With each questionnaire different from the next — and some spanning hundreds of questions — this can be a lengthy and daunting task. Is your firm prepared to pass an information security audit requested by a key client? Can you demonstrate compliance with regulatory requirements for data security and privacy? Join this session to learn how to better prepare your firm to effectively respond to information security questionnaires and audits.

Objectives:

- Identify the main standards and best practices businesses are now asking of their law firms.
- Discuss strategies and tips for the easiest and best response to your clients.
- Illustrate why having a robust information security plan is essential to winning and keeping key client relationships.

Other Information:

- 75 Minutes
- Audience: Basic
- CLM App Management Category -FS: Operations Management
- CPE Field of Study: Business Management & Organization

Speaker Info: James Harrison

BOIE: Branch Office Managers Idea Exchange

Saturday, May 5 8:15 AM - 9:30 AM

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

CLMIE: Certified Legal Manager Idea Exchange

Saturday, May 5 8:15 AM - 9:30 AM

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.

HR30: Creating a Culturally Competent Law Firm



Saturday, May 5 8:30 AM - 9:30 AM

As legal professionals, most of us have explored the concept of diversity and have begun to create inclusion in our organizations. A new trend will be taking diversity and inclusion to another realm and discussing cultural competence — an awareness of the cultural differences that makes each person unique. Cultural Competence is also the ability to interact with and appreciate belief systems that differ from your own, thereby creating a way for everyone to work cross-culturally. The goal of this presentation is to enhance the knowledge and skills of legal management professionals on how to build and maintain a multicultural law firm and become positive change agents for their workplace. This program asks you to understand and reflect on your role in promoting inclusion and building successful and effective working relationships within your organization.

Objectives:

- Define diversity and culture and its impact on relationships within law firms.
- Recognize our unconscious biases and how they impact our culture and hiring decisions.
- Review the importance of collaborative working relationships with diverse others and the benefits of diverse perspectives in problem-solving.

- Recognize the importance of infusing diversity into your law firms to achieve a more productive, respectful and cooperative work environment.
- Develop a plan of action for becoming a change agent for diversity in our law firms and community.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Human Resources Management
- CPE Field of Study: Personnel/HR

Speaker Info: Michael Stephens

LI31: Piloting Progressive Workplace Strategies: A Case Story



Saturday, May 5 8:30 AM - 9:30 AM

Law firms today are eager to embrace new ways of working that promise to impact the firm's performance and the quality of life — but only after someone else has led the way. Latham & Watkins opened a new pilot floor in their New York office as a lab to test progressive workplace strategies. The floor features a wide variety of work settings and amenities for staff, offering choices of where to focus, collaborate, learn and socialize. There is a mix of glass-enclosed offices and open-work settings for lawyers and staff, as well as focus and team rooms. Additionally, there's a café, and various collaboration areas and amenities. Lawyers and administrative staff who opted into the floor were equipped with Bluetooth headsets and other technologies that enable them to work anywhere in the space. Pre- and post-occupancy surveys and periodic focus groups provide feedback, and the space is designed to adapt in response to suggestions. Presenters will share the components of a high-performance office that attracts and inspires.

Objectives:

- Outline the various components and work settings that contribute to the success of a high-performance legal workplace.
- Develop a clearly defined process for implementing a pilot floor and embracing change.
- Discuss lessons learned from the experimentation in the pilot floor and the feedback received and learn from them.
- Formulate ideas of work settings to implement in their own offices.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Management Services

Speaker Info: Steven Martin & Jennifer Murray

OM31: Maximizing Your Service Providers Contracts for Savings and Efficiencies

**Saturday, May 5 8:30 AM - 9:30 AM**

The trend toward mergers and acquisitions is sought to leverage size to gain market share. In addition to economies of scale, firms can gain tremendous efficiencies by centralizing functions and consolidating their services contracts. However, it's not only for firms experiencing an acquisition; centralizing services post-merger are vital for the firm to optimize efficiency, leverage size in the services marketplace, and streamline operations. Do you have multiple contracts with the same or different vendors? Do you have a firm-wide strategy for offsite records storage, office supplies or equipment? In this session, we'll dive into details about contract consolidation, how to approach this strategy, and key terms that are needed.

Objectives:

- Review the pros and cons of consolidating contracts, how to approach the strategy of this process and how to structure the request for proposal (RFP).
- List the critical contract terms, performance standards and score-carding that will make the process work.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Operations Management
- CPE Field of Study: Business Management & Organization

Speaker Info: Rob Mattern

HR32: Brezina Memorial Foundation Session: Unleashing the Power of Diversity and Inclusion: The Role of Legal Administrator as Agent for Change



Saturday, May 5 9:45 AM - 11:15 AM

It is evident that the global and national legal industry is transforming before our eyes. Driven to new forms of innovation and efficiency, firms are scrambling to find the right business model to keep up with the times. And digital natives (the wave beyond Millennials) are even more driven by a sense of purpose and values in what drives their life work. In looking forward to the workplace in 2030, these forces and the sheer changing demographics of our nation will put even more pressure on law firms to build a talent force that more accurately reflects its clients, the nation and the world. Beyond the monumental task of attracting and retaining diverse legal talent, legal management professionals can play a key role in establishing a firm's diversity competency by building a diverse supply vendor chain — especially for major capital expenditures.

Objectives:

- Examine the effect of changing demographics on U.S. workforce.
- Analyze the increased of client demand for diverse legal teams.
- Recognize the power of the legal management professional role into the future.

Other Information:

- 60 Minutes
- Audience: Basic
- CLM App Management Category -FS: Human Resources Management
- CPE Field of Study: Personnel/HR

Speaker Info: Elizabeth Birch

INTIE: International Idea Exchange

Saturday, May 5 11:45 AM - 1:00 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.

BOLD Bites

BB30: 5 Steps to Substantially Improve Governance Over Your Records

Saturday, May 5 1:15 PM - 1:30 PM

Going fully digital vastly improves information governance over your records. Even better, when combined with a firm-wide, off-site records strategy, digitization can eliminate firms' off-site records storage cost burdens and further reduce risk exposure. Can your firm execute this strategy? We'll discuss the five steps firms must take to ensure success in this area.

Other Information:

- 15 Minutes

Speaker Info: Rob Mattern

BB31: Teaching Old Dogs New Cyber Tricks: Getting Management and Attorneys Committed to Cybersecurity

Saturday, May 5 1:30 PM - 1:45 PM

Implementing and following an information security plan has become essential to the business of law. But getting everyone in the firm on the same page and following new cybersecurity policies can be tricky, if not painful. In this session, you will get innovative thoughts and tips on getting buy-in from partners, executives and attorneys, so you can successfully move forward in creating a culture of security and protecting the firm against data breach incidents.

Other Information:

- 15 Minutes

Speaker Info: James Harrison

BB32: Is What Is Said, What Is Done? The Essence of Accountability

Saturday, May 5 1:45 PM - 2:00 PM

At the heart of effective leadership is accountability. It means that you accept responsibility for the outcomes expected of you, both good and bad. It means you expect others to be accountable as well. As a leader, your behavior regarding accountability is critical. Accountability empowers people to perform well, demonstrate initiative and act responsibly. Creating a positive culture of accountability requires practical expectations, personal credibility, effective delegation and transparency. Learn specific, effective techniques to enhance your own accountability and how to spread those values from your team throughout your firm.

Other Information:

- 15 Minutes

Speaker Info: Michael Moore

BB33: Disruption: From Incident to Crisis

Saturday, May 5 2:00 PM - 2:15 PM

Not all business disruptions are massive from the outset. Many start as a small incident and grow into major crisis. The lifecycle of disruption from incident to crisis provides the best insight into how to deal with such situations. In this session, we'll walk through the lifecycle of a disruption and provide the methodologies for assessing, responding, communicating, escalating, reporting and resolving an incident and then discuss how this should fit into your business continuity plan.

Other Information:

- 15 Minutes

Speaker Info: Bob Mellinger

CM32: Humor: An Outlandishly Fun 5-Step Program for Workplace Wellness



Saturday, May 5 1:15 PM - 2:15 PM

Do you work in a stressful environment? Are you responsible for corporate culture and wellness? If so, you've come to the right place. Motivational, funny and high-energy, this session provides strategies for you and your teams to stay balanced in a sometimes unbalanced world, adapt to change, and stay focused on your business goals. In this engaging and interactive session, you'll explore how to be well, where to look to find humor and what to do once you've found it. Learn how to get the most out of work, deal better with change and laugh at just about anything.

Objectives:

- Identify strategies to stay positive and engaged.
- Discover how you can use humor to create a healthy and productive workplace.
- Identify key stressors, symptoms of stress and what to do about them.
- Discuss the physical, mental, social and professional benefits of laughter.
- Distinguish the difference between destructive and constructive humor.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category: Self-Management Skills
- CLM App Management Category -FS:
- CPE Field of Study: Communications

Speaker Info: Paul Huschilt

LI32: Bright Insights: Shedding Light on the Challenges and Trends Facing Today's Legal Sector



Saturday, May 5 1:15 PM - 2:15 PM

Competition, fee structures, succession planning, recruitment and retention, maintaining profit margins, and controlling expenses are just some of the challenges firms are facing on a daily basis. With this in mind, Cushman & Wakefield developed its annual National Legal Sector Benchmark Survey in 2013 to analyze trends and issues facing the legal sector. Since its inception, the survey results have provided an examination of the key drivers affecting law firms, as well as insight into the priorities of associates gained through their National Associate Survey. From technology and flexible workspaces to business development initiatives and future trends, you'll be provided with a deeper look into the results and their impact on law firms nationally. This session will offer insights on the continued shifts within the sector, and how law firms are making significant changes to remain competitive.

Objectives:

- Identify the top three issues related to business competition and how firms are improving attorney business development opportunities.
- Review how business and operational decisions are being made differently today and how smart decisions and change can dramatically improve operations, client services, internal collaboration, and overall business and profitability.
- Examine specific examples and statistics on how law firm leaders are consensus building internally to affect future change.
- Explain how statistics and trends can assist management in evaluating tough decisions and guiding the firm through the process.
- Discuss the future of the legal industry: In the next 10 years, where do you see dramatic changes occurring in the legal sector?

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Business Management & Organization

Speaker Info: Sherry Cushman

OM32: Outsourcing the Back and Middle Office: Is It the Right Long-Term Strategy for Your Firm's Profitability



Saturday, May 5 1:15 PM - 2:15 PM

The legal market for services is disintermediating into a legal supply chain of multiple alternative providers. From traditional services areas to litigation support services to legal process outsourcing (LPO) and more, outsourcing can be a strategy that reduces costs and infuses your firm with efficiency and expertise, while improving the recovery of those costs. However, many outsourcing engagements do fail. How can you determine whether to outsource or insource vital back and middle office functions? In this session, we'll discuss key questions to consider when investigation outsourcing, the pitfalls to avoid, and how to structure outsourcing engagements to ensure success for your firm's back and middle office operations.

Objectives:

- Explain how to take traditional areas of outsourcing (reprographics, mail, etc.) and make them more cost-effective and efficient with added benefits to the firm.
- Identify new areas, including document processing, records, litigation support and administrative resources, that should be considered for outsourcing.
- Discuss how the recovery of costs is a key factor in this process and the one area that most firms tend to leave money on the table.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Operations Management
- CPE Field of Study: Management Advisory Services

Speaker Info: Rob Mattern

FM32: Legal Project Management: What Lawyers Can Learn From How Accountants Approach Project Management



Saturday, May 5 1:15 PM - 2:30 PM

The demands of implementing legal practice management (LPM) principles continue to have an impact on law firms in ways that are far-ranging and culture-changing. This session will explore project management principles that have been in place for decades within accounting firms, where there is a heavy focus on managing individual fixed-fee engagements to achieve optimal profitability. While there are significant differences

between the practice of law and the practice of accounting, the principles of project management applied in accounting firms may prove useful when implemented in law firms. For a firm to be effective in the implementation of an LPM strategy, culture changes are necessary to address the areas of hiring, training, knowledge management, client service, technology and project analytics. We will provide insight on how the field of accounting addresses each of these matters in order to provide a framework to ingrain project management principles within a law firm environment.

Other Information:

- 75 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Management Advisory Services

Speaker Info: Angela Rodin

IPIE: Intellectual Property Idea Exchange

Saturday, May 5 1:15 PM - 2:30 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.

LFIE: Large Firm Idea Exchange (100+ Attorneys)

Saturday, May 5 1:15 PM - 2:30 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.

CM31: Stand in Your Power: Building Influence and Impact



Saturday, May 5 1:15 PM - 2:45 PM

Your personal brand is how you are known and the value others assign you. Often, the way others see us does not match how we see ourselves. But the way they see us directly influences their desire to offer us opportunities. To influence and impact stakeholders, professionals need to have a clear and compelling personal brand. In this lively presentation, we'll discuss secrets to personal brand strategy, with an emphasis on messaging, social media and body language as keys for success. Using real examples from the legal industry, you'll see how successful professionals build influence and manage their careers.

Objectives:

- Recognize the importance and relevance of personal branding.
- Identify how to build and maintain a meaningful and impactful reputation.
- Outline ways to impart credibility, influence and meet the needs of stakeholders.
- Show how to build executive presence and influence.
- Examine ways to increase confidence and the likelihood of career success.

Other Information:

- 90 Minutes
- Audience: Intermediate
- CLM App Management Category -FS:
- CPE Field of Study: Communications

Speaker Info: Lida Citroen

HR33: Collision Course: Where Equity, Activism and Policies Intersect



Saturday, May 5 1:15 PM - 2:45 PM

This current level of global activism hasn't been seen in 50-plus years. But what is "activism" and how does it apply to your firm? Activism occurs when individuals collectively take action to effect change. It is driven by the perception of inequity and can impact everyone that your firm interacts with, including clients, employees,

interns/prospective employees, the general public (jurors) and even judges. If your firm's policies are the target of activism, this session will help you to carefully evaluate and adjust them before the next collision course.

Objectives:

- Review how activism has impacted firms over the last five years.
- Identify areas of inequity or bias in firm policies and practices.
- Discuss strategies to update the firm's policies/practices to prevent, or better prepare for, activism.

Other Information:

- 90 Minutes
- Audience: Basic
- CLM App Management Category -FS: Human Resources Management
- CPE Field of Study: Personnel/HR

Speaker Info: Leah Smiley

HR34: The Foundation for Success: Effectively Aligning Performance Management with Total Rewards



Saturday, May 5 1:15 PM - 2:45 PM

Effectively managing, evaluating and rewarding employee performance is the cornerstone of everything that executives and managers are expected to accomplish. However, many organizations aren't doing this correctly. The primary reasons are two-fold: 1) a lack of consistency in management thought and application throughout the organization, and 2) nonalignment between employee performance and rewards. In his entertaining and interactive presentation, we'll examine practical tools, tips and techniques that specifically address these two critical concerns, including how to determine the most appropriate total reward components to use. Also, using real-world examples, we'll discuss how to design a strategic performance management methodology that really works. Without question, embedding this crucial performance management and total rewards alignment within the organization is what every business manager needs to accomplish to establish the foundation for success!

Objectives:

- Explain the critical importance of successfully aligning performance management with total rewards and the ramifications of not doing so.
- Examine the two primary reasons why this crucial alignment is not achieved in many organizations.
- Identify practical tools, tips and techniques that specifically address and answer these concerns.
- Describe how to determine the most appropriate total reward components to use.
- Design a strategic performance management methodology that successfully aligns performance management with total rewards.

Other Information:

- 90 Minutes
- Audience: Advanced
- CLM App Management Category -FS: Human Resources Management
- CPE Field of Study: Personnel/HR

Speaker Info: John A. Rubino

OM33: The Disaster Experience: Putting Business Continuity to the Test



Saturday, May 5 1:15 PM - 4:30 PM

Chances are that while you read this, an unexpected disaster is causing a law firm stress and confusion and is affecting its long-term ability to provide products and services to its clients. Are the firm's leaders prepared to handle it? Will they be able to recover? Disasters of every shape, size, look and feel happen all the time, affecting businesses and people's jobs, lives and families. This session is designed to put you in the throes of a real-life disaster situation, as it unfolds. You will make the critical decisions any law firm will have to make — and deal with the consequences of those decisions. After you've finished, you'll understand the importance of planning in advance for a disaster or other business disruption. You'll never want to be caught unprepared again!

Objectives:

- Demonstrate the communications and decision-making skills needed during a crisis.
- Relate how to increase awareness of going from planning to response and recovery.

- Discuss lessons learned from both previous disasters and how your firm could be impacted.

Other Information:

- 180 Minutes
- Audience: Basic
- CLM App Management Category: Communication Skills
- CLM App Management Category -FS: Operations Management
- CPE Field of Study: Communications

Speaker Info: Bob Mellinger

LI34: The Business of Law in 2025



Saturday, May 5 3:00 PM - 4:00 PM

Future prospects for the business of law are exciting. Client needs are increasingly complex. Emerging trends in the "internet of things," cyber-physical systems, 5G networks, and new global value chains and trade flows are creating entirely new categories of legal needs — each presenting opportunities to build new services. Firms that are up to the challenges will thrive in this future. This session builds on research undertaken within the University of Cambridge and through the International Bar Association on what the law practice of the future will likely look like and how it can meet these new needs. Many (but not all) law firms that dominate the world's major legal services today will still do so in 2025, but their management structures, processes and technologies will be significantly different. The session will guide strategic decisions needed to balance economic performance today with competitive advantage tomorrow.

Objectives:

- Examine how to think about the future through scenarios rather than forecasts/predictions.
- Identify which technologies are likely to have the greatest impact on the practice and the business of law by 2025.
- Breakdown how geography impacts the business of law and how trends in legal services differ across different markets, especially emerging markets.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Business Law

Speaker Info: Robert F. Millard

LI35: Millennial Attorneys on Workplace: In Their Own Words



Saturday, May 5 3:00 PM - 4:00 PM

Law firm professionals facing a renovation or relocation of their offices realize that they are planning a workplace for the next generation of leaders, mainly Millennials. These presenters obtained a research grant from Gensler's Board of Directors to evaluate if the workstyles and workplace expectations of Millennials embarking on a law career are unique in any way and how we can design the next generation of legal workplaces to support Millennial attorneys. We've targeted a small, hard-to-reach respondent group that included first-year associates, summer associates and law school students from across the United States. This presentation will outline key practical strategies that firm leaders can consider and implement to design a workplace that entices, supports and inspires Millennials in the legal profession.

Objectives:

- Develop insight into the unique workstyles of Millennial attorneys.
- Examine the workplace preferences and expectations of Millennials.
- Outline specific practical design strategies to implement in your law firm.
- Identify methods to quantitatively and qualitatively measure the benefits of the workplace strategies they implement.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Personal Development

Speaker Info: Timothy Bromiley, Kerri Henderson & Steven Martin

OM34: Turbocharge Your Information Workflow



Saturday, May 5 3:00 PM - 4:00 PM

Law firms struggle every day to control their information. The large troves of unorganized electronic and paper documents reduce visibility and availability and create security and compliance concerns throughout the firm. The solution is the development of a solid information process to categorize, organize and securely store these documents. Document management systems are the perfect tool, but often overlooked is the workflow required to properly categorize documents and automatically deliver them — not only to the repository but to the proper location within — no matter the format and location of the original document. In this session, we'll outline best-in-class workflows for building an information taxonomy, categorizing documents, and automatically routing both paper and electronic data to optimize accessibility and security.

Objectives:

- Demonstrate a basic understanding of information workflow.
- Explain how to design a workflow for digitizing paper documents by aligning with current preferences.
- Identify a process for information taxonomy and document routing.
- Discover change management strategies to ensure program implementation and success.
- Discuss tactics for overcoming the recalcitrance of legal professionals.

Other Information:

- 60 Minutes
- Audience: Basic
- CLM App Management Category -FS: Operations Management
- CPE Field of Study: Business Management & Organization

Speaker Info: John Gilbert

HR35: Caregiving and the Impact on the Law Firm



Saturday, May 5 3:00 PM - 4:15 PM

Approximately 44 million Americans provide care for an adult loved one. The average caregiver provides more than 24 hours of care a week and suffers physical strain from it. In fact, more than 60 percent of caregivers have requested workplace accommodations for caregiving; it's caused many more to quit or retire. As the population ages and more employees provide care, the impact on employers will grow.

Law firms need to understand the impact of caregiving and how to accommodate it, so firms can retain valuable people. Additionally, we'll discuss how federal law helps both employees and employers in managing the caregiving relationships.

Objectives:

- Review the demographics of caregiving in the United States.
- Summarize the characteristics of the average caregiver in the United States.
- Describe the stresses placed on caregivers due to their caregiving role.
- Examine the federal laws that govern medical and family leave for caregivers and employers.
- Outline techniques for employers to become a caregiver-friendly workplace.

Other Information:

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

Speaker Info: Twylla Sketchley, JD

MFIE: Medium Firm Idea Exchange (31 - 99 Attorneys)

Saturday, May 5 3:00 PM - 4:15 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 to 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.

SFIE: Small Firm Idea Exchange (1-30 Attorneys)

Saturday, May 5 3:00 PM - 4:15 PM

Do you do it all in your firm of 1 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.

CM33: What's EQ Got to Do With It: Using Emotional Intelligence to Maximize Everything



Saturday, May 5 3:00 PM - 4:30 PM

Emotional Intelligence (EQ) is a powerful tool that can inspire how you see and respond to the world around you. Utilizing your EQ can have a profound positive effect on you as well as the people you work with.

Developing your EQ can give you skills to: enhance relationships, communicate more effectively, read and appropriately respond to the social cues of others, and successfully manage your own emotions.

In this fun and engaging session, we will look at the impact of using EQ both personally and professionally, and discuss how it can profoundly affect your success and happiness. You will not only gain a better understanding of what EQ is, you will also learn practical ways to incorporate EQ into your work with all kinds of people and leave with valuable tools that you can utilize immediately.

Objectives:

- Identify the 5 main factors of emotional intelligence and how those factors can play into personal and professional success.
- Implement numerous strategies for seamlessly incorporating emotional intelligence into your personal and professional lives.
- Utilize tools and resources presented in the workshop that show EQ in action.
- Assess your own EQ and areas of strength and opportunities to grow.

Other Information:

- 90 Minutes
- Audience: Intermediate
- CLM App Management Category: Communication Skills
- CLM App Management Category -FS:
- CPE Field of Study: Communications

Speaker Info: Kari Knutson

FM33: Understanding Legal Organization Structures



Saturday, May 5 3:00 PM - 4:30 PM

The final session of the Law Firm Accounting Series focuses on the types of organizational structures available to companies. Whether you are working on a start-up adventure or evaluating your current legal configuration, this session will enlighten you on the types of organizational structures that exist. You will learn key facts that influence a decision on what type is right for you and ensure continuity of your business.

Objectives:

- Identify which organizational structures protect personal assets.
- Analyze the tax implications of a corporation.
- Examine the advantages and disadvantages of various organizational structures.
- Relate the importance of having a written agreement.
- Identify the issues of liability of others in your organization.

Other Information:

- 90 Minutes
- Audience: Basic
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Finance

Speaker Info: Lisa Waligorski, CLM

OM35: So You Think You've Had a Data Breach — Now What?



Saturday, May 5 3:00 PM - 4:30 PM

It's not a matter of if your firm will suffer a breach, but when. A botched response to even a small intrusion will almost certainly make the consequences of a breach worse, turning it into a potentially costly and disruptive incident. What are the steps you should take to meet the ethical and regulatory requirements for responding to a breach? What should you do to protect your clients and maintain your firm's good name? When should

you report an incident to authorities? How do you minimize the financial damages and disruption? Join this session to learn the answers to these questions and more. See what a formalized breach response plan should look like, and learn how cyber insurance can help mitigate disastrous financial liability.

Objectives:

- Examine what qualifies as a breach, and what a single incident could cost your firm.
- Discuss the responsibilities and steps for handling even a small data breach incident.
- Relate how cyber insurance can help mitigate the financial damages and recovery costs of a breach.

Other Information:

- 90 Minutes
- Audience: Basic
- CLM App Management Category -FS: Operations Management
- CPE Field of Study: Management Services

Speaker Info: James Harrison & Alan Wilson

Saturday, May 5

Idea Exchanges

LFPAIE: Large Firm Principal Administrators Idea Exchange

Sunday, May 6 8:00 AM - Noon

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.

PIPIE: Personal Injury Practice Idea Exchange

Sunday, May 6 8:00 AM - 3:00 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.