

# Idea Exchanges

## Sunday, May 22

- 9:00 AM - 3:00 PM
  - **PIPIE** Personal Injury Plaintiff Idea Exchange
- 
- 12:30 PM - 1:45 PM
  - **BOIE** Branch Office Idea Exchange
  - **IPIE** Intellectual Property Idea Exchange
- 
- 12:30 PM - 4:30 PM
  - **LFPAlE** Large Firm Principal Administrator Idea Exchange
- 
- 1:00 PM - 3:00 PM
  - **CPIE** Corporate Idea Exchange
- 
- 1:30 PM - 3:00 PM
  - **CLIE#1** Chapter Leaders Idea Exchange
  - **CLIE#2** Chapter Leaders Idea Exchange
  - **HRIE** Human Resources Idea Exchange
- 
- 2:00 PM - 3:15 PM
  - **CLMIE** CLM Preparation Idea Exchange
- 
- 3:15 PM - 4:30 PM
  - **GVIE** Government Idea Exchange
  - **LFAIE** Large Firm Administrator Idea Exchange (100+ Attorneys)
  - **MEDIE** Medium Firm Idea Exchange (31-99 Attorneys)
  - **SFIE** Small Firm Idea Exchange (1-30 Attorneys)
- 
- 3:30 PM - 4:30 PM
  - **INTIE** International Idea Exchange
-

## Monday, May 23

### 8:00 AM - 9:30 AM - Keynote

**CM10** Five Shark Points: Fundamentals for Success in Business and Life

---

Along Daymond John's entrepreneurial journey, through his many successes as well as failures, he has learned a few things about getting the best out of business and life. He believes the keys to his success include establishing the right mindset and following a few fundamental principles, which he calls his five S.H.A.R.K points. These unique goal-setting and achievement strategies will empower you to make positive changes in every aspect of your life.

#### Objectives:

- Determine the importance and value of seeing yourself as a brand
- Identify the steps to set and meet your strategic goals
- Use your inspiration to think BIGGER

Daymond John

### 9:30 AM - 10:30 AM

Daymond John Book Signing and Photo Opportunity

---

## BOLD Bite: Massive Change, One Bite at a Time

Monday, May 23 11:10 AM - 11:30 AM

Expand your mind as you are shown small powerful actions that create an irreversible butterfly effect that will ripple through your entire organization. You will explore how you can implement big change through small, measured actions. Additionally, this BOLD Bite is designed to shake you loose and help bring a bigger vision into focus. You will leave seeing synchronicity in what appears to be chaos, and you will know how to expertly manage your way through the process to achieve whatever you are working to accomplish.

**Paul Purdue** has been helping legal professionals harness the power of technology since before IBM released the PC in 1981. Since founding Attorney Computer Systems in 1980, he has become one of the nation's leading experts on front and back office automation in the law firm. Purdue writes for the *Michigan Bar Journal*, *Technolawyer* and *GP Solo*. You can also follow Paul Purdue via his monthly blogs and videos on process, procedure and infrastructure.

20 Minutes

---

## BOLD Bite: Persuasion Principals Made Simple

Monday, May 23 11:30 AM - 11:50 AM

Have you ever wondered why we say "yes" when we want to say "no"? Or why some individuals are seemingly able to effortlessly persuade others to cooperate or agree? This BOLD Bite reveals the primary persuasion principles that influence our behavior, and demonstrates how to incorporate this knowledge into your own communication.

**Lee Broekman**, Principal of Organic Communication, provides communication and management guidance to law firms and legal professionals. A professor and executive trainer, she is an expert in persuasion, presentation and interpersonal communication. Broekman taught at the Annenberg School for Communication at USC, guest teaches at the UCLA School of Law and is co-author of *Successful (Happy) Lawyering: Increase Your Bottom Line and Well-Being, One Insight at a Time*.

**Judith Gordon, Esq.** provides communication, leadership, media and professional development direction to law firms and their lawyers, helping them develop business, increase visibility, enhance their reputations and lead more productive, satisfying lives. Gordon teaches at UCLA School of Law, and she is co-author of *Successful (Happy) Lawyering: Increase Your Bottom Line and Well Being One Insight At a Time*.

20 Minutes

---

## **BOLD Bite: What is Reasonable Accommodation Under the ADA?**

Monday, May 23 11:50 AM - 12:10 PM

Learn about the interactive process when an employee requests, or you have reason to believe, an accommodation is necessary. You will also learn when an extended, unpaid leave must be an accommodation even after the FMLA leave has expired. The EEOC is taking a very aggressive stance on unpaid leaves after FMLA leave has expired. You will learn what is required of an employer and what needs to be in your handbook. Undue hardship and other possible defenses will also be covered in this short, but comprehensive session on ADA compliance.

**Thom Cope, JD**, is a Partner at Mesch Clark & Rothschild P.C. Attorneys in Tucson, AZ. He is a Fellow of the College of Labor and Employment Lawyer, listed in Arizona's *Finest Lawyers* and *Arizona Super Lawyers*. As a trained and experienced mediator, he has brought many cases to successful resolution. In addition, he is a mediator trainer for the Civil Rights Division of the Arizona Attorney General's Office. Cope is frequently sought as a lecturer in the employment law field and teaches business law, the U.S. Constitution and organizational ethics at the University of Phoenix.

20 Minutes

---

## 11:00 AM – Noon Education Sessions

### HR11 The Cell Phone Experience: Implications for the Workplace

---

Today's cell phone is an often-used, seldom thought-about part of today's business. And lack of control has large personal and financial implications for any business. The cell phone has become a mobile business center that employers (and employees) must understand, regulate, monitor and use appropriately to avoid exposure. With employers facing increasing liability for cell phone usage and the activities that accompany that use, understanding the implications in today's business climate is a real and important aspect of business management.

#### **Objectives:**

- Examine the broad range of considerations for business management that cell phone use, provision and oversight has in the workplace
- Determine specific exposures and management considerations, including liability, wages, health, HIPPA, trade secrets, client confidences, employee tracking, privacy, harassment and discrimination and more
- Discuss management oversight, control and governance of cell phone use in the workplace
- Review the practical implications of the cell phone experience
- Implement a practical management/policy governance of cell phones in the workplace

Scott Cook

### LI10 Writing a Successful Response to a Request for Proposals: Part 1: Quality and The Nonfinancial Considerations

---

Do you wonder if your firm's responses to Request for Proposals (RFP) are hitting the mark? What's the right way to make your firm stand out from the rest? Make sure your proposals deal convincingly with legal project management and budgeting, alternative fee arrangements, service delivery and balanced legal teams. Hear from an expert consultant about what companies that are choosing law firms really want to read in proposals and what they don't.

#### **Objectives:**

- Determine how to breathe new life in old relationships
- Re-consider and customize the value proposition
- Examine the power of a well-drafted RFP
- Discuss how to feature both the lawyer and the firm

Richard Stock

### LI10B A Clear Vision: Corporate Law Department Leadership Strategies

As the chief strategic and tactical legal advisor to a corporation, General Counsel must structure the in-house law department to maximize resources, minimize risk and ensure compliance. What are the emergent and priority challenges in-house law department leaders face today? What do they see as the most critical considerations in their multiple roles in the present, and how do they foresee these may change in the future? What are the strategies they employ to shrewdly manage

matters, staff, technology, and the relationship with outside counsel? How do they determine staffing and technology requirements, align the function of the department with the needs of the corporation, collaborate across the organization and demonstrate value? Join this panel of top corporate General Counsels and in-house law department leaders to discuss key strategies, share insights on tactics, and provide a future vision for your corporate legal team.

**Objectives:**

- Identify the strategies employed by top in-house law department officers and leaders
- Determine how other in-house law departments collaborate across the enterprise
- Examine how leading corporate legal department panelists have structured themselves to maximize value, minimize risk, ensure compliance and work most effectively with other departments and outside counsel
- Apply this knowledge to your own role and explore ideas for increasing value in your environment

Toby Brown, Peter Hebert, Paul Roy, Michael Wofford, Christopher Yost

**OM11** The Paper2Digital Law Firm

---

The paper2digital law firm is coming, but we're dragging our feet. We need a master plan to guide us through this transformation. Law firms must reduce the cost, risk and inefficiency of paper records – and move to a fully digital client file. But how? With return on investment (ROI) milestones along the way, we can plan and run this transformation. We need practical policy, a clear process and cultural tuning. Join this session to receive a master plan for your firm's paper2digital transformation. Plan a practical, steady approach that guides your law firm through the transformation with workflows to create a digital client file, while accommodating attorneys who still want a paper file.

**Objectives:**

- Evaluate and calculate the cost, timelines and ROI for the paper2digital journey
- Summarize the policies and processes to make the transformation happen
- Discuss successful paper-to-digital case studies of major law firms
- Determine how to overcome attorney resistance to digital client files

Steve Irons

## 11:00 AM - 12:30 PM Education Sessions

---

- **CM11** Coaching Attorneys on How to Coach Attorneys and Staff
- 

How effectively do your attorneys give and receive feedback? Room for improvement? Do you have any "Mt. Vesuviuses" – they let frustration build and then blow their top? Or "Quiet Herd Cutters" – when you don't meet their expectations and, rather than confront the issue, they quietly shunt you to the side? If you do have such attorneys, how can you persuade them there's a better way and coach them to handle problems differently? This session provides tools and

techniques enabling you to teach, model and coach constructive feedback, both giving and receiving.

**Objectives:**

- Construct a persuasive case that letting problems fester hurts your organization and serves no one's best interest
- Prepare to teach others how to give and receive feedback effectively at all levels – partners, associates and staff members
- Apply techniques that will enable you to become a trusted coach to your attorneys

Jathan Janove

**CM12** Reboot Your Energy

---

Wish you had more time in the day? Unfortunately, there's no magic wand to make that happen. Join this session to receive something better – the real science and actionable tips that will enable you to generate more energy to get more accomplished in the day and experience more pleasure during your downtime. Learn how to power up your energy, focus and productivity. You'll be amazed to find out that increased energy can be found by making just small changes in the way you eat, sleep, move and think.

**Objectives:**

- Discuss how our thoughts can trigger a physiologically-draining stress response – and how thought-shifting can boost energy
- Identify the stages of the sleep cycle and offer strategies on how to experience better sleep without spending more time in bed
- Describe how food fuels our body and the best pattern to eat for optimal energy
- Discuss how movement impacts energy and describe how often strategic movement is needed to sustain energy

Dr. Jo®

**FM10** Keeping Partners Informed with Key Performance Indicators

---

For a law firm to be successful, it must be able to identify and achieve organizational goals. Learn the need for key performance indicators, when to measure them, and how to report your findings in a format management can understand. You will also learn how to benchmark your firm's key performance indicators against industry trends and best practices that will help you to modify and improve your firm's performance.

**Objectives:**

- Identify which key performance indicators are critical to track and manage
- Calculate and measure your firm's key performance indicators
- Benchmark key performance indicators against industry trends and best practices

- Relate your firm's key performance indicators in a format that attorneys and firm management can understand

Jay Erdman

### **FM11** Savvy Social Security Planning for Boomers

---

Most people will participate in Social Security during their retirement. If you or your loved ones are approaching eligibility for Social Security benefits, you will find that there are complex decisions to be made. Not understanding the ins and outs of Social Security could have severe consequences for your future. This information-packed session will give you what you need to answer the important questions of when to apply for benefits, what to consider when choosing whether to take benefits at age sixty-two, and the financial impact of delaying your benefits.

#### **Objectives:**

- Explain the five factors to consider when deciding to apply for benefits
- Calculate when to delay benefits and when not to
- Discuss why you should check your earnings record for accuracy
- Estimate your future benefits
- Describe two innovative strategies for coordinating spousal benefits
- Analyze how to minimize taxes on your Social Security benefits

Lee Claymore

### **HR10** Take a Field Trip: Breaking the Mold of Your Leadership Development

---

Field trips were probably one of your favorite school activities – and the fun experience masked the real objective of learning. Why, then, do we center adult leadership development around lectures? If your organization is mired in "death by PowerPoint," you will come away from this session with a new way of thinking about developing leaders from the ground up. We will detail what types of field trips make the best learning experiences for adults, how to structure a developmental field trip, and the importance of the debrief after every experience.

#### **Objectives:**

- Identify which types of experiences make the best field trips for adult learners
- Determine the structural components of a developmental field trip
- Use the most important question in any experiential debrief

Erika Tedesco

### **OM10** Project Management for the Legal Management Professional

---

Are you spending unnecessary hours and working too hard? It's time to manage your projects better. Join this session to get straightforward tips, techniques and tools that will have you managing your projects with less work and less stress. Project management doesn't have to be

difficult, complicated or require you to learn complex tools and frightening jargon – nor is it just about those year-long slogs. A project is simply a connected series of tasks with a beginning and an end. Manage them thoughtfully, and make your work life easier with this straightforward, low-tech approach to control costs, manage changes, reduce risks and maximize your feeling of accomplishment.

**Objectives:**

- Practice project management techniques to control your workflow
- Identify how you can improve your teamwork as team leader
- Determine how managing your projects better builds stronger working relationships with internal customers and clients

Steven Levy

**OM12** Legal Lean Sigma® and Project Management: Driving Efficiency, Value and Competitive Advantages

---

Today's law firm and legal department professionals are faced with ever-increasing challenges and opportunities to help maximize efficiencies. In reconnecting legal costs to the value received, we begin with the voice of the client and then devise and employ strategies that deliver what clients want, the way they want it, when they want it. We can accomplish this while simultaneously developing competitive advantages for our organizations. With process improvement (PI) and project management (PM), not only are there no tradeoffs, but everyone wins. Bring back relevant ideas and skills that will take you – and your firm - to the next level.

**Objectives:**

- Examine and analyze what other law firms and legal departments are doing
- Explain how PI and PM work together to deliver significant returns on investment
- Assess how process improvement tools can identify and communicate best practices
- Promote and maintain a client-centric culture where internal and external customer requirements and functions are identified, analyzed, and continually tied to process improvement

Catherine Alman MacDonagh

---

**BOLD Bite: 5 Must-Do Desk Exercises**

Monday, May 23 12:10 PM - 12:30 PM

The average American sits for 13.5 hours each day, that's means today's professionals are spending at least half their waking hours hunched over computers, plates, smartphones and steering wheels! This chronically-seated state has major consequences on the muscles, joints, organs and spine of a body that was designed for movement. Not only are there physical challenges of having a sedentary work-life, but it's common to experience mental and emotional

complications as well. By attending *5 Must-Do Desk Exercises* you will learn and practice five fast and simple techniques to use every day to reduce the deleterious effects of sitting.

**Lance Breger** is a President of Infinity Wellness Partners, a comprehensive corporate wellness company that prepares law professionals for the most productive and healthy work life through four areas of onsite/online training: ergonomics, mind/body, nutrition and fitness. Over his 14-year career, Breger has been named a Master Instructor by American Council on Exercise, the IDEA Health & Wellness Association Program Director of the Year, and to the *Washingtonian Magazine* top trainer list.

20 Minutes

## 1:45 PM - 2:45 PM Education Sessions

### **FM13** Law Firm Profitability in the New World

---

The annual release of the AmLaw rankings always prompts a wave of commentary. Much of this is focused on how the Profits per Partner (PPP) numbers are manipulated by firms and how publishing the numbers may not be helping the legal industry. For all the bluster that follows the release of the list, what is not brought up in this dialogue is which factors actually drive law firm profitability. In this session we will dive in to those factors and explore the current state of understanding profitability in the legal market. We will also discuss how this information relates to how a firm might price its services as a way to enhance its bottom line.

#### **Objectives:**

- Identify how and why cash basis accounting creates profitability problems
- Determine how to best calculate profitability at the client and matter level
- Analyze the four major drivers of profitability

Toby Brown

### **HR13** Workplace Investigations: The HR Sleuth in Action

---

In today's environment, the actions, inactions and response of management in responding to work place events, complaints, comments and even rumors have both internal and external political and legal ramifications. This presentation will provide a substantive overview of what is expected, suggestions on best practices for planning, conducting and concluding the workplace investigation, and what the considerations and exposure are for the law firm setting.

#### **Objectives:**

- Identify when a workplace investigation is desired, required or helpful
- Determine what must be done internally for an investigation to be conducted, and when the choice to go forward is no longer a choice but a requirement

- Discuss specific exposures, activity outlines, interview needs and management considerations for HR, office administration and partnerships in the investigation process
- Describe management oversight, control and governance of investigations
- Recognize how to bring the investigation process to a close and use practical management/policy governance regarding the investigation process

Scott Cook

### **LI11** Writing a Successful Response to a Request for Proposal: Part 2: The Financial Considerations

---

Continue the conversation on writing a successful response to a request for proposal (RFP). The most successful RFP responses align the economic interests of the client and the firm. Learn how this is done. In this session, you'll examine setting the right price, the enigma of hourly billing, how to conduct negotiations and how to strike a new deal for value.

#### **Objectives:**

- Determine how to set an accurate price
- Examine how to improve profitability in an alternative fee environment
- Conduct negotiations
- Employ strategies when striking a new deal for value

Richard Stock

## **1:45 PM - 3:00 PM Education Sessions**

### **CM13** How to Confront Performance Problems Without Being a Quiet Herd Cutter

---

Using an interactive, scenario-based approach, you will address the common traps professionals and attorneys fall into when giving (or withholding) feedback to other attorneys and staff. We will impart from fresh thinking on how to dramatically improve their interactions, and show you how to avoid the "Quiet Herd Cutter" problem when confronting performance problems.

#### **Objectives:**

- Relate how to respond when a lawyer or administrative staff fails to meet expectations
- Employ an alternate approach to reversing the action of quietly excluding lawyers from new work when they have previously failed to meet expectations
- Apply a technique for setting yourself, your lawyers and/or administrative staff up for success in the future

Jathan Janove, Natalie Loeb

---

## **CM14** Unflappable: How to Look Smart When You Have to Think on Your Feet

---

What if you could be fearless when facing new situations? What if you knew there wasn't a question in the world you couldn't answer? What would you attempt if you had boundless confidence at the firm? This interactive program explores proven strategies you can use to stay cool under pressure when the stakes are high. Whether you're facing down a skeptical partner, presenting a fresh idea or meeting with a new vendor, you can improve your ability to think on your feet. Plus, this session will help you unlock the secrets to handling objections and using body language to your advantage. Best of all, you'll walk away with practical tips you can apply immediately.

### **Objectives:**

- Discover the steps to build confidence before the need arises
- Determine how to handle questions quickly and clearly
- Choose to take more risks in your day-to-day role
- Establish (or re-establish) yourself as a true asset to the firm

Steve Hughes

---

## **HR12** Diversity is a State - Inclusion is a Choice

---

Most diversity and inclusion training, including implicit bias training, continues to be grounded in advocacy, which research confirms invites scrutiny instead of embracing and learning new behaviors. Join this session to get the best practices for designing cutting-edge inclusion training. The right training can drive a culture change and sustain benefits after training. It also can develop the cross-cultural competencies needed to grow client revenue when law firms grow nationally and globally by merger or acquisition.

### **Objectives:**

- Relate best practices for inclusion training already being used in other professional service organizations with diverse professionals
- Analyze the four elements of behavior change-based inclusion training that works
- Determine ways to sustain the benefits of training and help leaders implement behaviors with action planning, coaching and professional development support

Susan Letterman White, Dana Kirchman

---

## **OM13** Wellness Programming: From Start to Finish

---

Wellness programs are a strategic imperative in today's legal landscape as a staff recruitment, retention, productivity and team-building tool. No matter the shape or size of your organization, you can integrate wellness into the fabric of your culture. In this interactive session, you will receive the answer to putting together a wellness program. Learn where to begin, how to gain

leadership support, engage staff, select programs to offer, keep expenses down, evaluate return on investment and minimize additional administrative time for your unique firm.

**Objectives:**

- Describe the steps to customize a wellness program for your organizational needs, size and budget
- Identify how to influence leadership to support use of a wellness program
- Determine how to best evaluate ROI (return on investment) versus VOI (value on investment)
- Use practical strategies for maximizing staff engagement, program promotion and design

Lance Breger

## 1:45 PM - 3:15 PM Education Sessions

### **FM12** Key Issues in Effective Profitability Enhancement

---

As a law firm business leader, you face a multitude of pressures, and managing profitability is one of your highest priorities. Other than working more hours, what can you do? Several factors affect the ability of a law firm to enhance its profitability objectives and provide an adequate return to the owners. Get a comprehensive review of each of the factors that affect your firm's profits, and the methodology for improvement and ongoing review to enhance your firm's profitability.

**Objectives:**

- Discuss the financial planning process
- Identify the effect that various assumptions have on profit levels
- Assess evaluation tools for examining progress of a financial plan against actual results

John Iezzi

### **FM14** Savvy Medicare Planning for Boomers

---

If you are approaching eligibility for Medicare healthcare benefits, you will find there are decisions to be made that are much more complex than you may be aware. Join this session to learn the ins and outs of Medicare and prepare for your future healthcare needs. Learn the important questions to ask, such as when you must apply for benefits, what to consider when choosing your healthcare benefit options, the consequences of missing the enrollment deadlines and why your healthcare costs will probably rise as you age.

**Objectives:**

- Discuss how Medicare enrollment periods work, and what you need to do to avoid penalties
- Calculate how much you can expect to pay in healthcare costs after joining Medicare
- Explain how Medicare works with private insurance to provide comprehensive coverage
- Examine why most people pay too much for private insurance and how you can avoid these

costs

- Explain why you must plan for higher health care costs in retirement

Lee Claymore

---

## **LI12** It's Not Who You Know, It's Who Knows YOU!

---

With so many choices confronting your prospective clients, the question becomes, "Why should they choose you?" Join this energetic and entertaining session to learn what it takes to recognize and promote your true competitive advantage while building a category-leading brand identity. Gain a new perspective on current techniques and trends proven effective by other companies, and how those lessons apply to your firm to gain meaningful differentiation. Leave with a new perspective of what it takes to create significant, sustainable competitive advantage in your marketplace, and a headful of new ideas and actionable strategies to become top-of-mind with your top prospects.

### **Objectives:**

- Identify how to build your business by building your brand
- Determine the most commonly overused marketing messages that can actually be detrimental to your promotional efforts
- Craft truly compelling, meaningful and persuasive marketing messages and deliver them in a powerful and memorable way
- Facilitate ongoing "brand-storming" sessions with your partner or staff to gain additional, valuable internal perspective of what sets your company and product apart

David Avrin

---

## **BOLD Bite: Performance Indicators for Law Firms; The Client's Point of View**

Monday, May 23 3:30 PM - 3:50 PM

Law firms compete to deliver value to their primary clients and to expand their market share. Corporate and institutional clients want performance to be measurable, in the belief that what gets measured gets done. The best performance indicators influence priorities, the allocation of resources and behaviors. Four indicators are presented: service, costs, results and innovation. From there follows their essential link to fees and the sharing of risks and rewards with clients that are both skeptical and interested.

**Richard Stock, BA, MA, FCIS, CMC**, has consulted to more than 250 law departments and 120 law firms in the last 20 years, covering eight countries and every major industry sector. He has written more than 300 columns, articles and books and is a frequent conference presenter. His work on data analytics and performance-based fee arrangements was instrumental in securing an ACC Value Champs award in 2013. Stock has been a law firm Chief Operating

Officer, an ALA member and presented to ALA national/regional meetings. He is also an Associate Member of both the American Bar Association and the Canadian Bar Association.

20 Minutes

---

## **BOLD Bite: Choosing Inclusion: How to Have the Courageous Conversations that Create Change**

Monday, May 23 3:50 PM - 4:10 PM

Courageous conversations to create change take more than good intentions – they need space to provide a safe, honest environment. In many organizations, change is needed, yet firm leaders haven't found a way to talk about it – or maybe they've talked yet not acted. Like a frame around a painting, our process helps firm leaders focus on courageous conversations, whether on inclusion or on talent more generally. You will learn about the four elements of this process to design high value meetings: choosing the right facilitator, creating the context, deepening the discussion and reflecting for action.

**Dana Kirchman** is an executive coach with 18 years of experience in consulting and management. She works closely with attorneys, business leaders and professional development experts to create and implement talent management solutions. Her practice includes group training, leadership team facilitation, and 1:1 coaching. She focuses on business development, team dynamics, assessment for promotion, emotional intelligence, and diversity and inclusion. She has held management roles at Viacom, American Express and McKinsey & Company. Kirchman lives in New York with her husband and two boys.

**Susan Letterman White, JD, MS**, helps law firm leaders design, implement and manage customized, organization-wide, strategic change projects to create sustainable and substantial performance improvements. Her work aligns leadership, culture and competency modeling with performance goal outcomes of business development, retention and growth, and the engagement, development, advancement and retention of exceptional lawyers. Prior to her consulting career, she practiced employment law for 20 years and served as a managing partner of a law firm in Philadelphia. White lives outside of Boston with her dog.

20 Minutes

---

## **BOLD Bite: The Role & Responsibility of the Business Professional in the Delivery of Value & Efficiency**

Monday, May 23 4:10 PM - 4:30 PM

**Catherine Alman MacDonagh, JD**, is the CEO and Founder of the Legal Lean Sigma Institute LLC. She is a former corporate counsel and law firm executive who now teaches and provides training and consulting services in process improvement and project management, strategic

planning, marketing and business development. A Lean Sigma® Black Belt and certified Six Sigma Green Belt, MacDonagh is an adjunct professor at Suffolk Law School and George Washington University's Masters in Law Firm Management. She is Chief Enthusiasm Officer of The Mocktail and the Legal Mocktail™ and the author of *Lean and Six Sigma in Law Firms*.

20 Minutes

---

## **BOLD Bite: 10 Minutes to Better (Shorter, More Productive, Less Stupid) Meetings**

Monday, May 23 4:30 PM - 4:50 PM

**Steven B. Levy** is the author of *Legal Project Management* and other books. A former senior leader in Microsoft's law department, he now heads Lexician, where he teaches project management, leadership and time management to law firms and departments around the world. His unique and practical approach to project management – based on 35 years managing projects and leading businesses on three continents – has helped numerous law practices become both more effective and more efficient.

20 Minutes

---

## **3:30 PM - 4:30 PM Education Sessions**

### **FM15** Pricing, Profitability, Project Management and Other Leading Trends

---

Explore the world of legal pricing, project management and related trends. We will look at how firms are approaching these areas, how broadly they are being adopted and how they are being managed on a practical level. If you are involved in the financial management of a firm or manage practice-based resources, join this session to hear how project management can help you to drive profitability at your firm.

#### **Objectives:**

- Identify how to drive profitability discussions at your firm
- Explain how to initiate a pricing program
- Discuss the challenges around the first two objectives
- Describe how project management can be applied to the practice of law

Toby Brown

### **OM15** Mergers, Moves and Leasing

---

How can leasing give firms the flexibility and quick decision making needed to implement a successful merger, acquisition or relocation? This session will appeal to the seasoned law firm

administrator who needs to make decisions on how to strategically procure technology and equipment for their firm – and make budget. Find out how leasing technology and equipment can provide your firm with financial strategies that optimally meet today's challenges.

**Objectives:**

- Analyze the equipment and technology marketplace with an emphasis on mergers, acquisitions and office relocations
- Assess the importance leasing plays in acquiring state of the art equipment, software implementations and upgrades with flexibility, and shorten decision cycles
- Develop best practices for the useful lifecycle of technology and equipment
- Determine the best finance decision-making process for your firm

Scott McFetters

## 3:30 PM - 4:45 PM Education Sessions

### **CM16** Defend Yourself Against Bad Decisions

---

We all cut cognitive corners; we rush to careless conclusions that lead us to undesirable circumstances. We live and work in pressure-cooker environments that accentuate our innate tendencies to generalize, miscalculate and prejudge. This interactive session will introduce participants to the cognitive biases – flaws in judgment – that prevent us from being rational. During the session, attendees will determine where they're most prone to such errors in judgment that lead them to make grave mistakes. Leave with tools to avoid thinking traps and key skills to make sound and successful decisions – takeaways you can apply immediately in individual settings and the workplace.

**Objectives:**

- Recognize the traps and triggers that activate our automatic, habitual responses
- Determine the thinking tendencies that misguide our judgment
- Assess the commons flaws in judgement that prevent rational decision-making

Lee Broekman, Amy Berenson Mallow, Judith Gordon

### **HR15** Social Media and the National Labor Relations Board

---

When employees say negative things about your organization, what can you do? Practice administrators and managing partners will learn the answers in this session. The NLRB enforces the law that applies to non-union employers as well as those with a union. Learn what rights you have when an employee speaks out on social media about wages, hours and working conditions at your organization. Is it an individual gripe or collective activity, protected under the law? You will learn the answers to these questions as well as what the NLRB considers a "legal" social media policy.

**Objectives:**

- Determine your rights and what you may and may not do when your employees post negative comments about you and your organization
- Identify the difference between an individual complaint and one that is protected by the law
- Examine what may and may not be put in a social media policy
- Discuss the results of not following the law and NLRBs sanctions

Thom Cope

**LI14** Can Law Firms Innovate? How to Drive Important Change in Your Firm

---

Why should law firms innovate? And what does innovation really mean within a law firm? In order to remain viable in a rapidly changing and increasing competitive industry, law firms must find ways to better meet, and even exceed, client expectations. This will require firms to become far more nimble and inventive in their approach to legal services delivery. We will explore the business case for innovation, tools for identifying innovation opportunities in law firms, and best practices for managing the implementation of these innovations in your firm.

**Objectives:**

- Determine the rationale and relevancy of innovation to your firm
- Develop tools to identify innovation opportunities
- Identify current and best practices in managing change in a law firm environment

Kristin Stark

**3:30 PM - 5:00 PM Education Sessions****CM15** Speak With Ease and Confidence

---

Have you ever declined an invitation to speak because of fear of speaking to a group and have regrets? Were you not promoted to the position you know you deserve because of your presentation skills? Learn how to improve your public speaking skills for personal and professional development. Gain foundations, tips and techniques for sharing your message in authentic ways while leaving memorable messages. Move from fear to joy, and feel the freedom of unlimited potential.

**Objectives:**

- Determine your authentic speaking style
- Discuss the source of fear of speaking
- Demonstrate your improved ability to articulate in front of others
- Develop comfort and ease while speaking to individuals and groups

Norma Hollis

---

## **FM16** Win/Win Pricing

---

Firms and their clients are continuously looking to create fee arrangements that benefit both organizations. Clients look for value scenarios, and firms look to foster long-term relationships that generate revenues to provide earnings. Join this session to explore concepts and methods that produce win/win engagements. Hear how win/win does not end with the fee arrangement. Learn what both parties need to create true shared management responsibility that produces successful results for your firm.

### **Objectives:**

- Examine how to deliver and communicate value from beginning to end of a matter
- Identify profit-maximizing opportunities beyond the pricing stage of an engagement
- Determine potential areas for improvement within your firm's pricing and legal project management functions

Peter Lane Secor, Aileen Leventon

## **HR14** Interviewing: How to Stop Hiring the Best Applicants and Hire the Best Employees Instead

---

In a recent survey, managers were asked if they were truly satisfied with the results of their interviewing and selection process – and over 73% were not. Yet, nothing is more critical to the success of a law office administrator than the ability to hire talented staff. Join this session to receive proven techniques that get past first impressions and get you the facts you need to make the right decision – for you, for your firm and for the applicant.

### **Objectives:**

- Determine how to stay in control of the interview
- Analyze how to position applicants to tell you the truth
- Discuss the three Ps (preparation, planning, positioning)
- Identify the five most important interview questions to ask
- Verify the questions you can and cannot ask

Mel Kleiman

## **LI13** How Legal Administrators Can Support Business Development

---

Are you supporting your firm's business development? Do you know the various ways you can? You can help lawyers define their marketing objectives and ideas, identify targets, develop reasons for communicating with targets, facilitate implementation and track results. You can be a source of motivation and provide valuable systems for meeting new people, building relationships and ensuring follow-through. Join this session to discuss how to facilitate a business development discussion, gain ideas for meeting targets and building relationships, examine what valuable tools you can offer clients and prospects, and much more!

**Objectives:**

- Identify how to be more knowledgeable in the marketing process
- Determine how to be more persuasive and motivational among the partners
- Develop innovative business development strategies
- Generate and communicate good ideas
- Examine how to gain greater credibility and respect from partners and colleagues

Robert Kohn

**OM14** Office Body and Brain Training 101

---

Is anything as important to your career and firm as your brain and body? How ironic that our work-related behaviors are most responsible for the degeneration these two critical resources! The fact is our brain, organs, muscles and spine are all suffering from our chronically caffeinated, seated, sugared, stressed and sleep-deprived state. This interactive wellness session explores the factors directly impacting the brain and body, and provides the specific steps for reversing these negative effects.

**Objectives:**

- Practice fast and easy desk stretches to share with your staff
- Identify optimal brain foods to serve at your firm
- Perform a meditation exercise for enhancing brain gray matter
- Examine the science behind sleep for body and brain repair
- Discuss safest position for your chair, keyboard and monitor

Lance Breger

---

## Tuesday, May 24

### 8:00 AM - 9:00 AM Education Sessions

#### **FM20** How to Build a Budget You Can Count On

---

The end of the year is approaching and your managing partner or executive director has asked you to prepare the budget for the firm. Where do you start? How can you accurately predict and then control the financial results for the next year? How do you get it approved? This introductory session will answer these questions and more, as well as provide you with a working model spreadsheet in Excel.

#### **Objectives:**

- Identify the key drivers in building a budget
- Determine how to predict accurate financial results
- Devise how to control the financial results for the new year
- Discuss how to get the budget approved

Mike Palmer

#### **LI21** Where Client Service Teams and Business Development Intersect

---

Client service is much more than doing great legal work. It's about knowing the client's business at all levels and anticipating their needs. It's also about responsiveness, timeliness, efficiency, internal planning, regular contact and feedback, and constantly demonstrating value. So, how does exceptional service relate to business growth? During this session, you will look at the systematic and integrated processes that can be implemented to develop client teams, mine internal and external competitive intelligence, strengthen client relationships, and develop new work for the firm.

#### **Objectives:**

- Identify the components of effective client service teams
- Develop strategies to build buy-in for client teams
- Examine the steps for an effective implementation process
- Demonstrate the connection between client service and business development
- Establish the importance of leadership development as foundation for exceptional client service

Steve Wingert

#### **OM21** Uniform Scanning from Anywhere

---

Paper piling up in your firm? Do you have an overstuffed file room, expensive offsite storage and difficulty in sharing documents? Meanwhile, remaining fully paper-based has been rendered untenable to the courts that now require electronic filing. Leading firms are finding substantial

return on investment from uniform scanning, which allows scans to be routed instantly from any of the firm's Multi-Function Devices (MFD), regardless of brand. Uniform scanning makes it easy for attorneys and staff to follow their firm's scanning and information governance protocols automatically. Isn't it time to put this on the top of your firms' to-do list?

**Objectives:**

- Differentiate between less paper and almost unattainable paperless strategies
- Describe when a picture is not worth a thousand words – i.e. the value of scanning and OCR'ing all paper
- Identify the benefits, including cost savings and return on investment of uniform scanning

John Gilbert

## 8:00 AM - 9:15 AM Education Sessions

### **FM21** Tax Update

---

As U.S. tax laws change, law firms need tax planning strategies that will minimize the burden on the firm and its partners or shareholders. Join this session to learn the law laws affecting law firms, the impact of recent or planned changes and effective tax planning that can help you save your firm's money.

**Objectives:**

- Discuss the significant tax laws that impact law firms
- Describe recent or expected tax law changes that affect your law firm
- Identify the potential impact of these changes
- Analyze tax planning strategies that can benefit your law firm

David Roberts

### **LI20** The Changing Landscape for Paralegals and Practice Support Professionals

---

As firms endeavor to implement communication solutions and manage projects, the role of paralegals and other practice support professionals continues to evolve. Join this session to discuss trends in paralegal staffing, the growth of cross-utilization and the role technology is playing in the evolution of both firm staffing decisions and communication with clients. In addition, we will examine how new non-attorney fee earner positions, contract personnel and outsourcing have changed the way in which lawyers provide client services. Participants will be encouraged to share their experiences in how changes in technology in their organizations have impacted workflow, paralegals and practice support personnel, and the result of their firms' financial investments.

**Objectives:**

- Describe the ongoing evolution of practice support roles
- Identify how cross-utilization is helping organizations enhance productivity
- Determine new categories of non-attorney fee earners that are impacting the delivery of legal services and can serve as new revenue streams

Gary Melhuish

**OM20** Utilizing Your Real Estate to Support and Implement Change

---

How do you use your real estate to support/implement change? There are factors law firms must consider regarding their real estate, such as the impact of technology, underutilized support and attorney spaces (40 percent of all attorney offices are vacant), and the cost of hard copy retainage versus electronic storage, among others. Learn how to identify and understand these challenging issues and how to use your real estate to support your firm during these ongoing changes.

**Objectives:**

- Identify the changes confronting the legal profession
- Discuss which real estate solutions encourage these changes
- Determine the financial impact of supporting or not supporting these changes
- Describe the challenges that can limit successful changes
- Indicate the pros and cons of successful real estate solutions to change

Elizabeth Cooper, Chris Murray

**8:00 AM - 9:30 AM Education Sessions****CM20** Trajectory Code: Manage Your Present Behaviors and Actions

---

Join this interactive, high-energy session to get a clear model of how to manage your present behaviors and actions. Plus, learn to forecast actions that will impact your firm's goals, culture, common language and commitment. Understand why you are where you are, and not where you want to be – and how to change it to become part of the 1% who are high achievers. You'll be able to recognize how tiny 1% adjustments can significantly change your trajectory, and learn how to apply the ABC Model in real-time business.

**Objectives:**

- Identify how to gain a deeper understanding of yourself and others
- Explain how to make tiny adjustments that have a big impact
- Discover who in your life might hold you back
- Steer your trajectory toward achievement and success

Dr. Jeffrey Magee

---

## **CM21** The Power of Body Language

---

Every day, we use body language to communicate, influence and connect with others. Body language can also help you understand how to decode emotions, uncover truth and increase effectiveness of your workplace communication. Join this lively, science-based session to review nonverbal signals for legal professionals, including courtroom behavior, jury selection, voire dire, mediation and negotiation. Bring back actionable tips you can use immediately.

### **Objectives:**

- Determine how to decode nonverbal signals in the legal environment to minimize office drama, miscommunication and relationship difficulties
- Manage, lead and connect more effectively
- Examine how to make a powerful first impression
- Use the art and science of networking and representing your firm

Vanessa Van Edwards

## **HR20** Overcoming the Discomfort with Differences

---

How does one address unconscious bias? In this interactive session, learn to uncover and address biases and blind spots across talent management processes. Discover how overcoming discomfort with differences can impact team effectiveness, performance management, client service, and more, plus how bias manifests itself within law firm culture. Learn how to become more inclusive and culturally competent in working with women diverse team members, and clients.

### **Objectives:**

- Analyze the inclusion imperative
- Discuss the importance of being aware of cultural differences in working on diverse teams
- Assess the importance of behavioral change
- Develop a focused approach to championing diversity and inclusion within your firm

Ritu Bhasin

---

## **BOLD Bite: Fast Forward: Top 10 Take-A-Ways**

Tuesday, May 24 9:40 AM - 10:00 AM

In 2004, Stinson Leonard Street introduced Fast Forward, a powerful, integrated business development program that has helped more than 70 partners build significant and sustainable practices. In the inaugural two-year program, 20 attorneys achieved a collective revenue growth of \$7.5 million on a \$150,000 investment. Join the program's designer, Stinson's Chief

Marketing and Business Development Officer, to hear the top 10 lessons learned from this successful revenue-generating initiative.

**Jill Weber** is Chief Marketing and Business Development Officer for Stinson Leonard Street, where she created Fast Forward®, a nationally recognized revenue program. Weber appears on the *National Law Journal's* "50 Business of Law Trailblazers & Pioneers" and was recognized as an "Unsung Legal Hero" by Minnesota Lawyer. She has received 22 local and national Legal Marketing Association (LMA) "Your Honor" awards. She currently serves on the LMA Board of Directors, and attended Harvard Law School's "Leadership in Law Firms" executive education program.

20 Minutes

---

## **BOLD Bite: What Makes a Law Firm Marketer Successful?**

Tuesday, May 24 10:00 AM - 10:20 AM

While it has been more than 30 years since the first law firm marketers were hired, sometimes it seems that good experiences are as rare as a unicorn. People talk about the perils of the position — the first marketing director never lasts, the tenure is just a few years, etc. — but don't believe them; there are highly successful marketing professionals in the legal industry. Come learn about the qualities that make marketers effective and the support that law firms must provide to help the function succeed.

**Sally Schmidt** is President of Schmidt Marketing, Inc. in Edina, MN, which offers marketing services to law firms. She was a founder and the first President of the Legal Marketing Association (LMA). In 1994, she was inducted as a Fellow into the inaugural class of the College of Law Practice Management. Schmidt was also inducted into the LMA first Hall of Fame in 2007 and is the recipient of its Lifetime Achievement Award.

20 Minutes

---

## **BOLD Bite: Inclusion of Lawyers with Disabilities**

Tuesday, May 24 10:20 AM - 10:40 AM

Increasingly, client and industry surveys are including disability status in their requests for information. However, self-identification of attorneys as individuals with a disability remains much lower than population data would indicate. If law firms can harness this key demographic, through educating attorneys and building an atmosphere that supports and encourages self-identification, they could enhance firm culture and build greater buy-in for all diversity initiatives. Learn why disability is becoming a diversity category in the legal industry.

**Sarah Babineau**, Managing Partner of Compass Metrics, is a subject matter expert in affirmative action and diversity and inclusion initiatives. Working in industries including legal,

academic health care, digital marketing, non-profit and retail, Babineau refined her skills in the midst of some of the most complicated times for diversity programs. She has been a featured speaker and panelist at the Association for Law Firm Diversity Professionals (ALFDP) and National Association for Legal Professionals (NALP) annual conferences.

20 Minutes

---

## **BOLD Bite: How to Get E-Learning Up and Running Quickly Without Breaking the Bank**

Tuesday, May 24 10:40 AM - 11:00 AM

Self-paced, bite-sized e-learning. "Sounds great. But isn't that expensive? Won't it add a lot to my team's crazy workload? Don't I need a lot of new technology in place first?" Nope. Nope. Nope. Not if you do it right. In this BOLD Bite, we'll discuss and demonstrate how law firms, law schools, law departments and bar associations have been able to leverage their subject matter expertise and existing content to quickly create multiple quality learning resources for a diverse audience with varying learning styles.

**Steve Gluckman** is the founder of LawFirmElearning, and the co-author of *E-Learning for Law Firms*, an Amazon best-seller published by the ABA. He has supported scores of AmLaw 200 firms in his career, and in 2011 he was appointed a Senior Fellow with Harvard's Center for Business and Government. He previously served as Sr. Director of Professional and Organizational Development at Manatt, Phelps & Phillips. Gluckman holds degrees from Harvard University and the Watson School of Engineering.

20 Minutes

---

## **11:00 AM – Noon Education Sessions**

**CM22** Creating a Great Workplace through the Gift of GAB: Goals, Attitude, Behavior

---

It is not just the Irish who benefit from the gift of gab. In this informative session, you will examine how goals, attitude and behavior are the key to a great workplace and environment. This session will leave you with a smile on your face, a spring in your step and, just as importantly, ideas for creating a valued, welcoming and productive workplace.

### **Objectives:**

- Assess the motivating power of clear goals and vision
  - Identify the attitude question to ask in difficult situations
  - Examine how your behavior creates your brand
  - Define the three words you wish to be known for
-

Conor Cunneen

## **FM22** Perils and Pitfalls of Law Firm Accounting

---

Compared to a typical small business, the accounting requirements at law firms are unique. The penalties for violations are much worse than a slap on the wrist or even a big fine. Accounting infractions can lead to disbarment – and have forced the painful closing of many a practice. This area requires a "zero tolerance for error" policy in your firm – and the knowledge to support it. In this session, you'll learn the fundamentals of both business accounting and trust (IOLTA) accounting. This knowledge becomes more important as often external bookkeepers and CPAs are unfamiliar with these specialized requirements, unless they have a whole lot of experience working with law firms.

### **Objectives:**

- Identify what is unique about legal accounting
- Describe the top five legal accounting challenges and solutions
- Determine the three basics of IOLTA bookkeeping

Dr. Rick Kabra

## **FM23** Reduce Risk and Increase Profits: Commercial Litigation Finance as a Lucrative Law Firm Resource

---

Commercial litigation finance (CLF) provides an innovative, non-recourse investment solution that permits law firms to reduce their financial risks and increase profits through the infusion of non-recourse investment capital. Join this session to discuss ways in which law firms are using litigation finance to be more innovative in crafting and winning lucrative client engagements, designing alternative fee agreements, and handling case management and staffing strategies. You will also be provided with an overview of how litigation finance can fit within a law firm's pricing, budget and project management strategies. Return to your firm with actionable strategies to strengthen client relationships, gain competitive advantages and improve your firm's finances.

### **Objectives:**

- Identify the kinds of CLF products that may be available to law firms
- Examine the mechanics of CLF financing arrangements
- Determine how to creatively design investments to suit applicable business goals and case strategies, with real-life hypotheticals
- Protect applicable client and law firm legal privileges when having discussions with potential funders, including the attorney-client privilege and the attorney work product doctrine
- Analyze ethical issues involving CLF

Daniel Gallagher

---

## **HR21** Deeper Dive on Minimization

---

Minimization is the key barrier to inclusion. Only by tackling minimization head on can a group move forward and real conversations begin. So let the conversations begin! We will discuss the developmental model of cultural sensitivity, and how biases and blind spots in the legal environment affect the retention and advancement of women and diverse professionals. Discover practical solutions to everyday diversity and inclusion issues.

### **Objectives:**

- Examine the concept of minimization
- Identify how focusing on sameness/universalism negatively impacts diverse professionals
- Determine how minimization affects the legal environment, including its effect on team effectiveness, performance, talent management, advancement, and client service

Ritu Bhasin, Shari Tivy, Jenniffer Brown, Robert Stevens

## **HR22** Using Influence and Impact: Become an Effective HR Business Leader

---

Human Resource (HR) professionals have worked beside their leadership teams to keep their firms productive and profitable throughout the recession. Now that the economy seems to be improved, firms are razor focused on growth. It's the right time for HR to raise its game and assist your firms while in growth mode. And while it's no longer good enough to partner with your leadership team, it is about influencing and leading that team towards better results. Join this session to discuss what leaders expect from HR today, and learn the 5-step journey in becoming an impactful HR business leader in your firm.

### **Objectives:**

- Describe the importance of business acumen in transitioning to business leader
- Recognize the roadblocks in the process and how to overcome them
- Determine what the business really needs from HR now and in the future

Cathy Missildine

## **LI22** Forensic Business Development Research: How Admin Staff Can Reveal Hidden Client Opportunities

---

Help attorneys identify opportunities to serve clients and prospects before the firm's competitors do! Companies who run into legal issues, more often than not, had warning signs that provided clues to these developing problems. The trick is to pay attention to these clues. This new kind of research, called Forensic Business Development Research (FBDR), requires new skills, new methodologies, interdisciplinary effort and rigorous execution over time. Join this session for an introduction to the critical role law librarians, accounting staff and marketing staff can play when it comes to monitoring the unusual business activities of clients and prospects, and uncover hidden business development opportunities for attorneys.

**Objectives:**

- Summarize the concepts of FBDR and how cross disciplinary teams can contribute to growing the revenues of the firm
- Describe the FBDR process and the types of business information which should be monitored
- Explain how to assess a client's business and develop client discussions which lead to improved client focus and service
- Discuss the challenges and opportunities associated with FBDR and how the information gleaned can be integrated
- Assess the client's unique business model and the financial, operational, personnel and competitive indicators that can provide insights into the company's strategy and challenges
- Determine what interdisciplinary support for attorney business development looks like and how support staff can make a demonstrable contributions to the firm's revenue growth initiatives

Eric Dewey

**LI23** The Next Chapter: Insights from Cushman & Wakefield's National Legal Sector Benchmark Survey

---

A new chapter has begun for the legal sector. Competition, fee structures and generational shifts are just some of the challenges law firms are facing. With these factors in mind, Cushman & Wakefield developed its National Legal Sector Benchmark Survey, a first of its kind analysis of trends and issues facing the legal sector. During this session, you will be provided with the 2015 survey results which offer a closer look at the continued shifts within the industry, the increasing role technology is playing and where law firms see themselves in the coming years. Gain a better understanding of national benchmarking statistics, determine how your own firm stacks up and examine where law firms expect to see dramatic changes occurring in the next 10 years.

**Objectives:**

- Develop a deeper awareness of what the next generation of lawyers are really thinking
- Examine the role technology plays within a law firm and how successful firms are adapting
- Identify the current issues related to business competition
- Analyze the financial trends: gross revenue spent on real estate, firm profitability, salaries and more
- Discuss the operational and financial decisions that need to be made to support a firm's business – not the individual attorney
- Outline insights gained through the survey into the future of the legal industry and consensus building ideas to effect change

Sherry Cushman

**OM22** Are Your Firms' Desktops Secure? Are You Sure?

---

With the increase of targeted, social engineered and cryptography-based attacks, a new approach for locking down desktops is absolutely critical. Through a live demonstration, witness firsthand how malicious attackers can evade common security controls and compromise the typical legal

desktop. We will explore the foundations of a secure desktop, as well as best practices that your firm can put into action to reduce the risk of attack and increase your firm's security.

**Objectives:**

- Discuss the foundations of a secure legal desktop
- Analyze the tactics that malicious attackers are using to compromise the typical legal desktop
- Summarize the tips and techniques for defending your firm's desktop environment against today's threats

J. Abernethy

**OM23** Reconsidering Legal Space Needs: Learning from Corporate America

---

Law firms have been among the last of the professional services firms to change their ways of doing things. But law firms are now looking to other industries that have made the leap into higher performing workspaces. Join an exploration of how similar industries have transformed themselves to become more flexible, more collaborative and more technology enabled. Learn about the fundamental shifts that are happening in the legal industry and how best to address them through design.

**Objectives:**

- Describe how the design of the workplace impacts performance, employee engagement and innovation
- Identify how other professional services industries have driven innovation in the workplace
- Apply lessons from other industries to the shifts happening in the legal work place

Timothy Bromiley, David Cartwright, Peter Fradkin, David Josker, Carlos Posada

---

## **BOLD Bite: What Mark Twain Learned Me Bout Public Speakin**

Tuesday, May 24 2:30 PM - 2:50 PM

A story history, review and learnings from a man who was not only a wonderful author, but the most popular speaker of his day.

Irishman **Conor Cunneen** is happily exiled in Chicago, where he says the natives are friendly and he's been force-fed more corned beef than he ever had in Ireland. Conor combines C-suite business experience from Europe and the United States with the wit that won him *Chicago Humorous Speaker of the Year*. The result is substance with humor and programs that are insightful, memorable and implementable, and of course laced with impish Irish wit. This author of four books is husband to his long-suffering wife, Pat.

**20 Minutes**

---

## **BOLD Bite: The Business Case for Transformational Leadership**

Tuesday, May 24 2:50 PM - 3:10 PM

This is a high level discussion on the cultural and behavioral implications of leadership. We will discuss how this relates to planning and action in areas like practice groups, client service,

**Steve Wingert, CLM**, is a 20-year veteran of law firm administration, Past President of ALA, and a principal of Nesso Strategies. A forward-thinking leader, he understands the leadership and management challenges within law firms. He develops leadership talent, assesses needs and issues, and facilitates collaborative solutions. Wingert holds masters' degrees in human resources and business administration, and is currently a doctoral student in interdisciplinary leadership at Creighton University.

20 Minutes

---

## **BOLD Bite: Less Paper vs. Paperless - Why One is Doomed to Fail**

Tuesday, May 24 3:10 PM - 3:30 PM

There is enormous value in reducing the amount of paper at a law firm. But firms that choose to "go paperless" are likely setting themselves up for failure. In fact, the amount of paper at most firms has actually increased. There are many reasons for this, including lack of direction, budget and clarity of purpose. A better strategy is to simply work towards "less paper." This BOLD Bite will discuss the benefits of such a strategy and how to implement it with an interactive process that will actually reduce the amount of paper your firm keeps.

**John Gilbert** is the Senior Vice President of nQueue and has more than 30 years of experience in selling to, and supporting, law firms throughout the United States, United Kingdom and South Africa. He helped pioneer the methodology used to customize Microsoft Word for the legal environment, including the awareness and removal of metadata in documents. Gilbert has been published in *Law Technology News*, *Peer to Peer*, *Legal Management* and *National Law Journal*.

20 Minutes

---

## **BOLD Bite: Adden Humor Two You're Presentashun**

Tuesday, May 24 3:30 PM - 3:50 PM

Simple tips, tricks and techniques to help anyone connect with their audience via humor.

Irishman **Conor Cunneen** is happily exiled in Chicago, where he says the natives are friendly and he's been force-fed more corned beef than he ever had in Ireland. Conor combines C-suite business experience from Europe and the United States with the wit that won him *Chicago Humorous Speaker of the Year*. The result is substance with humor and programs that are insightful, memorable and implementable, and of course laced with impish Irish wit. This author of four books is husband to his long-suffering wife, Pat.

20 Minutes

---

## **2:30 PM - 3:30 PM Education Sessions**

### **FM24** Become the Rainmaker of Your Firm's Bottom Line

---

In today's legal culture, the glamour resides with those who bring in top line revenue. Successful firms not only increase client revenue but also implement a system for tracking, measuring and reducing expenses. Learn how to simplify the purchasing process, limit your time, track performance, while providing great service to your employees. With some simple tips and tools, attendees will learn how to improve their effectiveness and their firms' profitability.

#### **Objectives:**

- Prepare simplified supplier contracts
- Negotiate more effectively
- Determine how to effectively manage suppliers

Steve Mizes

### **FM25** Understanding Financial Data

---

Are you not fully comfortable using and interpreting financial statements and related financial data? Having trouble understanding how double entry accounting keeps everything in balance? If you struggle to understand how financial accounting works and how it all ties together, this session is for you.

#### **Objectives:**

- Discuss double entry accounting and how it keeps the world in balance

- Review how the income statement and balance sheet interrelate
- Examine how to become better at communicating financial results to others
- Describe how to use financial information for improved decision-making

Brenda Clarke

## **HR24** Diversity Data Requests: Guiding Your Internal and Client-Facing Efforts

---

Law firm human resources and diversity departments are finding themselves besieged by diversity data requests from clients, industry surveys and internal stakeholders and are struggling to keep up. At the same time, many law firms are increasing their use of data as an effective tool to gain partner buy-in and compete for resources. During this session you will learn the most valuable ways to measure diversity, how to proactively spot trends and potential problem areas before your clients do, and best practices for responding to client data requests.

### **Objectives:**

- Analyze diversity through standard activities such as hiring, promotion, retention and separation rates
- Use data and analysis to make the case for diversity programming
- Determine if diverse attorneys are getting the same opportunities as a non-diverse control group
- Implement best practices for pulling client and industry survey data

Sarah Babineau

## **2:30 PM - 3:45 PM Education Sessions**

### **HR23** Bite-Size is the Right Size: The Move Toward Brief, Targeted Learning

---

The shift to modular, targeted learning is on. Bite-size is the right size for delivering useful online content to today's learners. Bite-size content is short and focused, and thus easier to absorb and understand – and time-saving. But how do you get these resources in place? How do you make bite-size learning easy to access? How are firms using this approach to offer learning and information at the exact point of need? Join this session to get a demonstration of how firms of all sizes have been able to leverage their existing content to create targeted, just-in-time learning. We'll look at different approaches, demonstrate actual solutions and outline what works and what does not.

### **Objectives:**

- Identify how to go about creating bite-size learning resources without breaking the bank
  - Employ various ways to make just-in-time learning easy to find and access
  - Determine what works and what may not when attempting to create a library of just-in-time learning resources
  - Discuss what other firms are doing in this area and where they are headed
  - Examine specific examples and walk away with examples, a best-practice summary and a checklist
-

Steve Gluckman

## **LI24** Fast Forward®: Driving Top-Line Revenue for Your Law Firm

---

In 2004, Stinson Leonard Street introduced an innovative program designed to help 20 attorneys grow their practices faster than they could on their own. Fast Forward is a powerful, integrated business development program. In just two years, the 20 participants in the firm's initial program achieved a collective revenue growth of \$7.5 million based on a \$150,000 investment.

Additionally, nine of the original participants have sustainable practices of more than \$1 million. Based on the initial program success, the firm institutionalized the program, and more than 70 partners have participated over the past decade. Join this session with the program's designer, Jill Weber, and coach, Sally Schmidt, to receive their insights on this successful revenue-generating program.

### **Objectives:**

- Identify high potential partners who will benefit from a rigorous and systematic approach to business development
- Generate increased firm revenue through an integrated, systematic business development program
- Track and measure success, including financial and subjective assessments

Sally Schmidt, Jill Weber

## **LI25** Engage Your Team and RETREAT

---

Do you have challenges at your office? Is your firm merging or moving? How can you address leadership, communication, team development, time and stress management, or other issues at your firm? Hold a retreat! Join this session to develop and conduct a memorable retreat, and advance important initiatives in your firm. Whether the goal is to bond and have fun or develop critical strategies, you can have a successful retreat when it is approached with vision and focus. We'll also practice what we preach and plan a retreat together so you look like a pro when you do it yourself.

### **Objectives:**

- Discuss how to set the objectives of the retreat
- Examine how to design the content and elements of a successful retreat
- Determine the details involved in planning a retreat – it's not just ordering chicken for lunch
- Summarize how to implement and follow up with action plans and timetables to ensure everyone feels it was a successful retreat

Patty Olejnik

---

## **OM24** From Here to the Cloud - A Roadmap to Bridging the Gap

---

Cloud computing is the future. But most firms are still tied to traditional IT. There's a gap between the cloud environment all tech savvy people talk about and the traditional with which we all started. Join this session to find out where your firm lies on this spectrum, where you want to be and what you need to do to get there. We'll define the cloud, plot the points along the spectrum, pick a few brave audience members to share where they fit, and use these real life situations to explore how to move all or part of your existing infrastructure into the cloud without losing everything you've built so far. You'll come away with a much clearer understanding of a difficult and vague concept that, for many, defies definition.

### **Objectives:**

- Identify elements of your firm's technology infrastructure that are in the cloud, those that are "blended" and those that are not in the cloud
- Recognize and map out clear steps to move all or part of your systems and infrastructure to the cloud
- Examine the hidden "gotchas"
- Describe the advantages and potential problems in moving all or part of your infrastructure to the cloud

Paul Purdue

## **2:30 PM - 4:00 PM Education Sessions**

### **CM23** Marathon Leadership: 26.2 Lessons for Modern Leaders

---

Modern leaders face a host of complex challenges: a volatile global economy, significant changes in workplace demographics, increased shareholder expectations and an accelerated rate of technological change that is unparalleled in world history. To overcome these challenges, today's leaders must be visionary, focused, disciplined, hardworking, driven to succeed and inspirational – the same traits that all great marathon runners possess. In this interactive session, learn how to overcome the leadership challenges with "The 26.2 Lessons for Modern Leaders" (one for each mile of a full marathon.) Through self-analysis, case studies and group exercises, attendees – even those who are self-avowed "couch potatoes" and don't like to drive 26 miles, let alone run that distance – will begin applying these critical lessons for becoming better leaders.

### **Objectives:**

- Incorporate the "26.2 lessons for modern leaders" into your daily leadership behaviors
- Determine the differences between effective leadership and management
- Leverage your individual leadership strengths, while compensating for their individual leadership style weaknesses, as identified by the Performance Management assessment
- Assess the performance of your followers based on "the five stages of performance"
- Discuss the performance needs of your followers by accurately applying "the five performance management roles"

- Match the appropriate performance management role behaviors to the performance stage being demonstrated by your follower

David Knapp

## **CM24** Toxic Employees, Toxic Workplaces

---

What is a toxic employee, and what is a toxic work environment? How does this toxicity affect employee or attorney engagement and productivity? Join this interactive session to hear how to address the toxicity in your workplace, and learn the skills and tools needed to remove it. Practice a new set of skills and tools, build a toolkit and learn how to rid the firm of this employee-engagement hindering dynamic.

### **Objectives:**

- Determine the relationship between respect, trust and engagement and higher productivity and performance
- Illustrate and employ new skills and tools to deal with toxicity in the workplace

Mauricio Velasquez

---

## Wednesday, May 25

### 7:45 AM - 9:00 AM Education Sessions

#### **CM30** Finding the Funny in Change

---

Whether it's going green or dealing with the myriad of new rules that govern the industry, we are constantly reacting to a new playing field, routinely having to reassess and re-evaluate our practices. And all of this change causes fear, tension and miscommunication! In this practical, humorous session you will get latest research about laughter and health and learn how to diffuse tension instantly, kick off tough conversations and facilitate communication, all by using humor.

#### **Objectives:**

- Identify practical, immediately useable skills for handling change using humor
- Determine what you should avoid doing when faced with change
- Explain the importance of adapting to change
- Examine the health benefits of using humor

Jan McInnis

#### **HR31** Problematic Partners: Handling Underperformance and Misbehaviors

No matter the size, every firm has their problem partners. Call them naughty, negative or ne'er-do-wells, they are a nightmare to rehabilitate. Join this interactive session for best practices in creating a process that manages partner performance and behaviors in a way that supports partner rehabilitation and addresses performance issues in a positive and effective manner. Examine what is behind poor performance or misbehavior, how to clarify partner objectives, establish accountability and learn the keys to implementing a specific plan and timetable for managing underperformers or improving behavior.

#### **Objectives:**

- Identify how to use coaching and career transitioning to solve underperformance issues
- Determine how to handle partners that behave badly through critical conversations
- Explain how to identify when bad behavior becomes misconduct and what to do about it
- Examine what you can't do or say when dealing with underperformers and misbehavior
- Discuss what to document during the improvement process

Dr. Sharon Abrahams, Joseph Altonji, S. Dan Anderson

#### **OM30B** Active Defense: Surviving an Active Shooter

Since 1966 at the University of Texas, we have seen senseless and tragic loss of life due to deranged individuals. Our current world is full of disasters, which makes it necessary to know what to expect and what to do should you find yourself faced with an active shooter. We rarely focus our thoughts on such topics, so common-sense instruction by experienced professionals may save your life. Stephen Daniel will summarize a historic overview of active shooting in America.

---

Objectives:

- Recognize an active shooter profile
- Discuss the method of “Run, Hide, Fight”
- Assess emergency response plans
- Review case studies
- Develop your own survival mindset

Stephen Daniels

## 8:00 AM - 9:00 AM Education Sessions

### **FM30** Make It Rain! Accelerate Your Cash Flow, Buoy Your Profits and Evaporate Your Risk

Join this fast-paced, interactive session to receive a number of viable, proactive strategies to boost your firm's financial performance, improve client service and mitigate malpractice and accounts receivable (A/R) risk. There is a winning interrelationship that exists between best practices of client service and best practices of firm financial A/R management. We will examine and discuss many of the current and emerging challenges that your firm currently faces or may face in the future. We will also include compelling, relatable facts and statistics that will help you gain acceptance from the decision makers in your firm.

Objectives:

- Determine proactive and client-centric best practices that will accelerate cash flow and increase firm profits
- Explain emerging technologies to increase firm cash flow and boost firm profits
- Examine process management solutions to help you improve firm profits, performance and client service
- Analyze three new emerging trends related to e-billing technologies that will transform how law firms do business in the future
- Discuss new strategies and metrics of client satisfaction that will allow you to fine-tune your specific firm needs toward greater profits and success

Bob Karau

### **HR30** Substance Abuse in the Legal Industry

Patrick Krill, director of the Hazelden Betty Ford Foundation Legal Professionals Program, will provide an in-depth look at a groundbreaking new study on the current rates of addiction, depression and anxiety in the legal profession. The study, a joint undertaking of the Hazelden Betty Ford Foundation and the American Bar Association, captured 2014/2015 data from approximately 15,000 practicing attorneys throughout 19 states and represents the only large-scale, nationwide attempt at capturing such data in the history of the American legal profession. Learn what the profession can do to improve the situation and help the exceptionally high number of struggling lawyers.

---

Objectives:

- Discuss the current rates of substance use disorders among practicing U.S. attorneys
- Review the rates of depression, anxiety and other mental health concerns, and what these numbers mean for a law firm
- Compare the breakdown of the prevalence of these issues among various subpopulations (age brackets, years in practice, practice types, work environments, firm size, gender, etc.)
- Identify why the problem is so significant in the legal industry and the barriers to seeking help

Patrick Krill

### **LI30** Recovery, Renewal and Reinvention: Navigating the Next Decade

Driven by the dramatic shift in how professionals practice, value their effort, and deliver their services, there is a new model of creating opportunity that will propel each profession forward. It is a culture supported by collaborative tools, a flatter global landscape and an increasingly rapid pace of expert analysis. Join this session where you will be guided through the catalysts for the change and learn the techniques you can use to reinvent your firms' profiles in the recovery.

Objectives:

- Create a renewed culture of collaboration that will promote operational improvements
- Engage firm management more effectively to raise the profile of the administrative team and its activities
- Incorporate technology into developing, marketing and executing initiatives focused on reinvention in the recovery

Ari Kaplan

### **LI31** The Coming Tsunami

Buyers of services have demanded that the business model change to fit their needs. The legal services industry will undergo a significant shift in the way it must operate. What is affected? It will start with strategy and structure and move to the firm's compensation system. Although discussed in articles like Bloomberg's Why It's Time for Big Law to 'Adapt or Die, the Futurist Committee of the American Bar Association has been broadcasting this since the late 1990s. In this session, we will show where changes can be made, even given the intransigence of the lawyer to change or adapt to a shift in the services business. It first happened to the certified public accountants in the 1980s and then to the doctors in the 1990s. Hear what's coming to the legal industry!

Objectives:

- Identify the new skills that will affect the administrator, including the identification and recognition of trends
- Analyze the ways to present those trends and their implications to your law firm
- Evaluate the ways you can lead your firm to adapt

William Cobb

---

### **OM30** Innovative Design Strategies for the Small Law Firm

Small law firms with less than 50 attorneys are often able to be more nimble and innovative than their larger counterparts. They can more easily embrace and implement new strategies and programs to drive their desired business outcomes. When it comes to the built environment, the right workplace design is critical to ensuring that these firms can achieve the identity, productivity and efficiency needed to service their clients and grow their business. Attendees will review case studies that show the implementation of such strategies and their outcomes. They'll also see the most current and future-looking design trends that small law firms are embracing today.

#### Objectives:

- Identify new strategies specific to small law firms that can improve business outcomes
- Examine case studies showing implementation of such strategies and the outcomes
- Discuss why pop-up law firms can be a tool for smaller firms to explore new geographic locations or modes of working

Marilyn Archer, Charles Gordon, Doug Parker, Steve Martin

## **9:15 AM - 10:45 AM Education Sessions**

### **CM31** Remarks and Brezina Memorial Session: Civility Pays

While leaders are implementing initiatives to cut costs and maximize productivity, chances are they are missing a potentially devastating expense: the cost of incivility. As employees exchange seemingly inconsequential inconsiderate words and deeds, productivity and collaboration plummets and norms are shredded. And the effects of incivility flow to customers and external stakeholders, damaging relationships and influence. Join Christine Porath to discuss the varied ways incivility wrecks performance and robs the bottom line. She'll touch on some fundamentals of civility and share recommendations for what leaders should do to enhance their effectiveness and craft a more civil, thriving work environment.

#### Objectives:

- Determine the costs of incivility and the benefits of civility
- Identify what civility is and what you should focus on to be more civil
- Examine what leaders and organizations should focus on

Christine Porath

---

## **BOLD Bite: Pressure on Law Firms to Protect Client Data**

Wednesday, May 25 11:00 AM - 11:20 AM

More to Come.

---

**James Harrison** is the Founder and Chief Executive Officer of INVISUS, a cyber-security and identity theft risk management company. He is the creator of the InfoSafe data breach compliance program as well as several other cyber-security and identity theft protection programs on the market today. Harrison is a leading expert in cyber-security, identity theft and data breach protection. He has trained and spoken to several major industry trade groups about critical security issues and best practices.

20 Minutes

---

## **BOLD Bite: Five Steps to Mitigating Fraud and Risk**

Wednesday, May 25 11:20 AM – 11:40 AM

As our global economy grows and matures, more law firms are doing business on an international scale. Many more firms will soon be considering international matters due to client demands and changes in our legal marketplace. We will review a number of ideas and proactive best practices to mitigate international risk and fraud, and 5+ ways you can protect your firm.

Even if your firm isn't planning to enter the international market, this BOLD Bite will help protect your firm from domestic threats.

**Bob Karau** is Manager of Client Financial Services for Robins Kaplan LLP, a national law firm. Since his first class on "Future Studies" at the University of Wisconsin in 1976, he has been a student of innovation and change. He has striven to pioneer innovation in the credit and collections field for more than 35 years, with the mantra "innovate or evaporate." In 2015, Karau was elected to the National Board of the Credit and Financial Development Division of the National Association of Credit Management.

20 Minutes

---

## **BOLD Bite: What Trends Are Turning into a New Era of Legal Services**

Wednesday, May 25 1:20 PM - 1:40 PM

What are the trends in the legal profession that will create new era of practice? The 36-year-old business model is being overrun current events. Even surveys of general counsel for 2014 show they feel that 70% of the time they had to initiate client responsiveness, efficiency, and predictability to promote the new era. The two key trends that point to a new era include: (1) client focus and (2) effectiveness and efficiency which will drive many other internal implications. To respond to the future, administrators need to ask three questions and respond to them. Learn what they are.

**William C. Cobb** is the President of the Cobb Consulting. He provides counsel to improve the competitive position of his clients, including the assessment of the impact of trends in the market; growth strategies and mergers; pricing services and alternative billing; practice management; firm governance and structure; partner review, evaluation and compensation; and similar strategic subjects of critical importance to law firm and legal department leadership.

20 Minutes

---

## **BOLD Bite: Employee Recruitment, Engagement & Retention for a Professional Services Firm**

Wednesday, May 25 1:40 PM - 2:00 PM

As a professional services firm, your product is your culture. And your culture can be the best opportunity for innovation. Hear what leading firms are doing in the areas of employee recruitment, engagement and retention.

**Mike Wiedemer, CLFP**, Senior Vice President at First American Legal Finance, a City National Bank Company. Wiedemer is a Certified Lease and Finance Professional (CLFP) and is responsible for all aspects of the sales and service process at First American. He has helped First American double its revenue in three years, while at the same time achieving the top spot on *Best Companies to Work for in New York State*, and earning recognition from *Fortune Magazine* as one of the "20 Best Financial Services Companies to Work for in America." A sixteen-year veteran at the company, Wiedemer was the recipient of First American's Chairman's Award for excellence in character and leadership in 2002, and in 2008 he was honored as one of *Rochester Business Journal's* "Forty Under 40."

20 Minutes

---

## **BOLD Bite: Why You Should Worry About Even Small Data Breaches**

Wednesday, May 25 2:00 PM - 2:20 PM

Your firm should be prepared for the probability that it will suffer from a data breach. With increasing regulatory pressure and growing concerns from your clients about potential cybersecurity problems, even a small data breach incident can have significant consequences to your firm. We will review the real-world risks and the financial damages that can impact your firm when a breach does occur. You'll leave with simple actionable steps you can take right now to identify where your firm is at risk, and how you can address your data breach compliance shortfalls and client concerns.

**James Harrison** is the Founder and Chief Executive Officer of INVISUS, a cyber-security and identity theft risk management company. He is the creator of the InfoSafe data breach compliance program as well as several other cyber-security and identity theft protection programs on the market today. Harrison is a leading expert in cyber-security, identity theft and data breach protection. He has trained and spoken to several major industry trade groups about critical security issues and best practices.

20 Minutes

---

## **BOLD Bite: Maximizing LinkedIn for Lawyers**

Wednesday, May 25 2:20 PM - 2:40 PM

Are your lawyers using the power of LinkedIn to grow their practices? With over 380 million users, LinkedIn is the most popular social network for professionals. It serves as a powerful tool to gain visibility, attracts ideal prospects and has become known as the "go to" for a person in a specific area. We'll explore what your lawyers need to do to optimize their profiles and discuss key ways lawyers are using LinkedIn to network and bring in business.

**Barbara Mencer** is a marketing consultant specializing in helping lawyers and law firms build successful, thriving practices. She has worked 30 years in the legal industry with 12 of those years as in-house marketing director for law firms. A past president of the board of directors of the Legal Marketing Association, Southern California Chapter, Mencer is the author of many publications on business development, including the comprehensive practice building system, *Making Rain Out of Mist*.

20 Minutes

---

## 1:15 PM - 2:15 PM Education Sessions

### **FM32** Choosing Your Entity

---

Is your firm properly structured? What do you do if it is in the wrong structure? Join this session to hear the pros and cons of each type of entity that a firm may use, including Limited Liability Partnership, C Corporation, S Corporation, Partnership and Sole Proprietor.

Objectives:

- Discuss the types of entities a law firm can operate as
- Determine the tax and non-tax pros and cons for each type of entity
- Evaluate what structure is the best fit for your firm
- Assess what to do if the structure of your firm is not optimal

Steve Cleland

### **HR32** Lawcountability: The Next Generation in Business and Professional Development

Law firm expectations associated with business, career and professional development have reached a tipping point. Join this session to receive practical ideas in leveraging technology to build a culture of accountability within your firms. Lawyers nationwide are using a uniquely designed digital platform to consistently engage in more dynamic follow-up and increasingly effective outreach, while firms take advantage of an unprecedented level of transparency to simultaneously track milestones, evaluate progress reports and incorporate game-like benchmarking initiatives. This new era of accountability is shifting the landscape forever and for the better.

Objectives:

- Track milestones to remove the mystery from who is engaging in what activities and when
- Evaluate progress through simplified reporting
- Benchmark various initiatives in which professionals engage

Ari Kaplan

### **LI33** The Changing Role of the Legal Secretary

The role of the large law firm legal secretary has changed significantly over the past five years. Join this session to focus on the evolution of the legal secretary role in firms today. You'll also learn what is happening in the legal industry as a result of this evolution. We will discuss what is working and what is not, and we will examine the challenges firms are facing in implementing these changes. Bring back strategies and ideas for making the transition as easy and uncomplicated as possible to your firm.

Objectives:

- Examine how the evolution of the legal secretary will impact all law firms
  - Identify the pros and cons of new secretarial models
-

- Determine how to overcome common obstacles when implementing new secretarial models
- Apply new strategies for properly utilizing legal secretaries

Jennifer Hill

### **LI34** Digital Marketing and the Power of Story

"If you fail to plan you plan to fail." It's an old axiom, but so often law firms are not thinking about their future. In this session, we will discuss the importance of a succession plan and adapting to the digital change that all firms face. We will cover the importance of building emotion, doing business with millennials, why being social matters, how YouTube establishes credibility, and the importance of quality content being spread everywhere. The landscape continues to change – ensure your firm is ready.

Objectives:

- Discuss importance of planning
- Determine why a first impression is crucial
- Identify how to use LinkedIn and YouTube effectively
- Examine the importance of content marketing
- Analyze if to blog or not to blog, and what makes a good one
- Explain the importance of a story

Corey Saban

## **1:15 PM - 2:30 PM Education Sessions**

### **HR33** Impact of the 2016 Elections and SCOTUS Nomination to the Affordable Care Act

The 2016 elections promise to bring more uncertainty to the Affordable Care Act (ACA). Provisions that may be drastically affected include the Cadillac Tax, Employer Shared Responsibility, and the often overlooked Non-Discrimination provision, among others. We will discuss some potential outcomes of several meaningful elections and how they may influence the ACA. But because of the uncertainty of these outcomes, we will continue to monitor and revise the presentation until shortly before the conference.

Objectives:

- Determine whether your firm's health insurance plan will be subject to the Cadillac Tax in 2018
- Identify the framework to build a health insurance strategy that maintains compliance and takes advantage of the ACA provisions
- Examine the various ACA provisions and their likelihood of remaining part of the ACA depending on election outcomes
- Discuss the views and legislative priorities of the Presidential candidates

Mark Shore

### **LI35** Conflict Issues in a 21st Century Life Sciences Practice: Ethics

How are firms and companies handling ethical and business conflict issues in an increasingly specialized world? We will discuss current conflicts and ethics challenges, including the

increasingly complicated world of bio-similars and subject-matter conflicts. The discussion will also include best practices for drafting and negotiating an advanced conflict waiver that is enforceable and acceptable to everyone.

Objectives:

- Determine where conflicts can arise and anticipate how to handle them;
- Distinguish between ethical conflicts (and their attendant risks) and business conflicts
- Identify responsibilities for deciding best litigation strategies for biosimilar applicants and reference product sponsors

Kevin Noonan

## 1:15 PM - 2:45 PM Education Sessions

### **CM32** Why People Do What They Do

---

Why people do what they do is more clearly understood after learning various ways we each approach and process the world. This fun, insightful session will help you identify different personality temperaments and interactive styles. Enhance your communication skills by identifying what motivates individuals based on their core needs and strengths, which are essential in building an effective team and better relationships.

Objectives:

- Examine simple strategies in understanding the differences in personality temperaments
- Identify interactive styles, needs, strengths and motivators
- Discuss how to listen for intent and meaning behind the message
- Describe how to build a cohesive and productive team

Tracy Spears

### **FM31** How to Manage Your Money: Personal Finance 101

Do you want to learn how to save more, improve your credit score and pay off your debts faster? Maybe you need to figure out how to properly set up your bank accounts or learn the difference between retirement and investment accounts—or maybe you want to find out more about the different insurances you need. Get the answers to these and other questions and receive the personal finance education you never received as a kid.

Objectives:

- Identify how to budget your money easily and effectively every month
  - Name the tips to save more of the money you make without feeling restricted or deprived
  - Discuss how to build cash, pay off your debts and improve your credit score
  - Describe the basics of investing and retirement accounts
  - Determine the different types of protection you need as you build and grow your net worth
-

Brittney Castro

---

## **BOLD Bite: Preventing Fraud in Your Law Firm**

Wednesday, May 25 3:00 PM - 3:20 PM

**Steve Cleland, CPA**, is the Partner-in-Charge of Audit and Accounting services at Beach Freeman Lim & Cleland, LLP. He provides clients with a strong background in assurance services (audit, review and compilation), assisting clients with selection of appropriate policies that are consistent with shareholder goals and presentation of the results to users including shareholders, banks, prospective investors and regulatory agencies. In addition, he brings in-depth experience in auditing Employee Benefit Plans. A Certified Fraud Examiner, Cleland assists clients with fraud prevention techniques and fraud investigation.

20 Minutes

---

## **BOLD Bite: Coach Them UP or Coach Them Out**

Wednesday, May 25 3:20 PM - 3:40 PM

The biggest responsibility of leadership is developing people. Taken from Tracy's bestselling book, *What Exceptional Leaders Know*, she will focus on the four conversations all exceptional leaders must be able to have. Along with tried and true scripts, she will provide an explanation of how to deal with underperforming employees and also how to make sure you keep your best employees from leaving.

**Tracy L. Spears** is a Vice President with Transworld Systems, author, consultant and a member of the National Speakers' Association. As a keynote speaker, she has addressed thousands of people with her signature presentations, including "Why People Do What They Do" and "What Exceptional Leaders Know." Spears is also the co-author of the best-selling book, *What Exceptional Leaders Know*, which delivers high-impact skills, strategies and ideas for all types of leaders. She is also an accomplished athlete and competed in the U.S. Olympic Festival in Japan as a member of Olympic Coaching Instructor.

20 Minutes

---

## **3:00 PM - 4:00 PM Education Sessions**

**LI38** Working through the Bureaucratic Red Tape of Decision-Making

---

The structure of government organizations and large firms can create an abundance of red tape that slows down decision-making, discourages creativity and stifles innovation. Organizations with hierarchical structures are often bound by rigid controls making them less able to respond to changing conditions in the legal environment and more apt to frustrate dedicated workers. Join this session to receive strategies and action steps to boost your power and keep things moving.

Objectives:

- Identify 10 strategies to cut through bureaucracy and get into action now
- Determine how to get decisions made up and down the ladder
- Examine how to stop being slowed down by procrastinators or a stalled agenda

Linda Hardenstein

## 3:00 PM - 4:15 PM Education Sessions

### **CM33** When You Want To Be H.E.A.R.D. - Negotiate!

Negotiation is part of everyday life. You are negotiating when you work to get the best price and payment terms on software or hardware, revisions in service contracts, extensions on project deadlines or a fabulous employment agreement. We will cover ways to get more from every negotiation while maintaining positive, respectful relationships. Negotiation pros will review techniques that are rusty or forgotten. Negotiation rookies will gain confidence in their ability to get more of what the firm deserves. And everyone will learn five keys to successful negotiations: The H.E.A.R.D. Process. Be more confident to meet those challenging situations that can save the firm time and money.

Objectives:

- Discuss a negotiation process that works in all situations for business and personal situations
- Explain why it's time to stop depending upon the old tried and tested "split the difference" negotiation process
- Demonstrate new techniques to acquire the information from others that will be critical when you must "get down to business"
- Decipher when "no" means "maybe" or "tell me more"

Mary Redmond

### **FM33** How to Plan For a Successful Retirement

Americans are living longer, healthier lives than ever before. We're retiring earlier and doing more in our retirement years. Whether you have 20 years to go or just 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 create the right retirement strategy to help you create a successful, fulfilling retirement.

Objectives:

- Identify the type of retirement you want to plan
  - Determine the different types of tax-advantaged savings vehicles for retirement savings
  - Describe how annuities may fit into your retirement plan
-

- Explain investing do's and don'ts to help you grow your retirement assets efficiently
- Discuss key concerns many retirees face and how to avoid them

Brittney Castro

### **FM34** Budgeting Between Settlements: Avoiding the Cash Crunch

For Personal Injury/Plaintiff firms, managing cash flow is of paramount importance. Proper budgeting, financing, and banking can keep the practice running smoothly in both the generous times as well as the lean times. What financial tips and tools can you use in order to even out your cash flow? Join this session to get practical advice on how to manage the finances of a personal injury/plaintiff practice and avoid the cash crunch.

Objectives:

- Determine budgeting techniques to effectively manage cash flow
- Identify tools and techniques that are available to assist and guide in the area of financial management
- Compare options for financing a practice as an integral part of practice management

Richard Gray

### **HR34** Federal Employment Law Update

Staying on top of the changes in the employment world, particularly with the recent changes in federal labor and employment law, is a never-ending challenge. Join this session to examine key developments in federal employment law, including the changes in the FLSA exemption standards, the impact of state marijuana reform measures on firm practices, important federal cases and EEOC and NLRB developments of note. Get the latest updates to firm policies to ensure compliance with the amended laws.

Objectives:

- Determine the developing HR challenges of 2016
- Examine and prepare to tackle the new developments
- Implement changes in policies and practices

Richard Simmons

### **LI36** Workplace Ethics: How To Keep Your Job Without Losing Your Integrity

Staying on top of the changes in the employment world, particularly with the recent changes in federal labor and employment law, is a never-ending challenge. Join this session to examine key developments in federal employment law, including the changes in the FLSA exemption standards, the impact of state marijuana reform measures on firm practices, important federal cases and EEOC and NLRB developments of note. Get the latest updates to firm policies to ensure compliance with the amended laws.

Objectives:

- Determine the developing HR challenges of 2016
-

- Examine and prepare to tackle the new developments
- Implement changes in policies and practices

Nan DeMars

### **LI37** Leveraging the Power of Generational Differences

How can firms harness the potential of generational differences to increase rainmaking and marketing success while simultaneously creating high levels of engagement? The existence of multiple generations provides law firms with a unique opportunity to market services using a diverse set of tools. No longer reliant on a single paradigm or marketing preference, law firms and organizations can develop multiplatform rainmaking strategies that address the needs of specific generations while contributing to the bottom line. Join this session to find out exactly how.

Objectives:

- Align marketing strategies to accommodate preferences across age, personality and lifestyle choices
- Identify how to fulfill the needs of a younger workforce while cultivating a cohesive unit of multi-generation team members
- Apply the talents of a multigenerational workforce with divergent priorities to meet client needs more effectively

Barbara Mencer

### **OM32** De-Mystifying Data Breaches and Information Security Compliance

Stolen confidential and personal information is the new currency of the global criminal underground. The private and sensitive information handled by attorneys makes every law firm an ideal target for data thieves and cyber-criminals. The accidental exposure or theft of your client's information can have devastating financial and other consequences to your firm, regardless of size or type of practice. Join this important session to get the basics about how data breaches happen. Learn the top 10 best practices your firm should follow to prevent a breach, and find out what you as an administrator can do to help your firm get – and stay – compliant with federal and state data privacy laws.

Note: Attendees will receive a scorecard takeaway that allows each attendee to score his/her firm on how it currently measures on the "Prevent, Protect and Preserve" compliance scale.

Objectives:

- Identify real world data security threats specifically related to law firms
- Discuss what vital steps you need to take to fortify your firm and establish a plan for breach response
- Score your firm on information and data security and breach compliance

James Harrison

---

### **OM33** Equipment Leasing: Considerations and Strategies

More than 80% of businesses in the United States lease equipment and the legal industry is no different. This session will decode the language of leasing and review the terms and conditions that will affect the process and economics of your lease. You will leave this session with a greater understanding of how firms are using leasing to facilitate office projects and maximize after-tax profits.

#### Objectives:

- Differentiate the different types of leases (capital lease, operating lease, tax lease)
- Identify the pending lease accounting changes
- Discuss the considerations of leasing vs. buying
- Identify the terms and conditions that affect the process and economics of your lease
- Examine and share case studies of how firms use leasing to facilitate office projects and maximize after-tax profits

Mike Wiedemer

---

#### **Session Code Key**

CM – Communications & Organizational Management

FM – Financial Management

HR – Human Resources Management

LI – Legal Industry/Business Management

OM – Operations Management