



# TECHSHOW2023

**March 1-4, 2023**

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Presented by:



AMERICANBARASSOCIATION

Law Practice Division

# Program

Thursday  
03.02.23

## CLIENT EXPERIENCE

10:00am - 11:00am

### THE FUTURE OF LAW IS HYBRID: HOW TO LEVERAGE VIDEOCONFERENCING TECHNOLOGY IN YOUR LAW PRACTICE

**John Burnett, Nkoyo-Ene Effiong**

The pandemic radically changed how law practices operate, creating three fundamental shifts around hybrid work, client engagement, and virtual court proceedings. This session will explore those shifts, address why law firms must adapt to stay competitive and differentiate themselves, and how mastering video presentation can help legal professionals present with greater confidence and competence, grow their business, and improve operational efficiency.

11:15am - 12:15pm

### EARLY AND OFTEN: BETTER CLIENT COMMUNICATION THROUGH AUTOMATION

**Jen Lee, Regina Edwards**

Creating a client workflow that sets expectations and guides them through the process is key to managing many of the stressful situations in the legal world. Even better is when that client workflow has anticipated the client's questions and provides information and answers before the client even knows they need it. Process mapping client communication and using automation allows law firms to have happy clients, eliminates the "my hair is on fire" approach to client communication, and results in successful law firm management. This session maps out typical client workflows for a variety of practice areas, identifies the opportunities for communication, and presents tools to automate those communications.

2:00pm - 3:00pm

### LIGHTS, CAMERA, ACTION! HOW TO USE VIDEO TO LEVEL UP YOUR FIRM'S CLIENT EXPERIENCE

**Temi Siyanbade, Stanley Tate**

Most small and solo law practices

struggle with the best ways to increase their impact and manage their workflow. There is no shortage of potential solutions, but few are as impactful as video. If you leverage the right tech tools and tricks, video can enhance your client experience while simultaneously simplifying operations.

Join us in this session where we uncover creative ways attorneys and legal professionals can use video to streamline processes, improve client communications, and create meaningful client interactions that leave lasting impressions and create raving fans.

3:15pm - 4:15pm

### HUMANIZING YOUR CLIENT EXPERIENCE WITH TECH

**Charina Garcia, Ashley Pepitone**

A humane, compassionate, equitable, and diverse legal function is essential to building public trust, compromise, and advancing the common good. Now more than ever, legal professionals must hone their skills in relationship building to be effective counselors and advisors to their clients. Yet, our greater reliance on tech can be a significant barrier to this critical need. This presentation will address some of the ways you can run a tech-fueled law practice without sacrificing the human component integral to an excellent client experience.

## CORE CONCEPTS

10:00am - 11:00am

### TECHNOLOGY COMPETENCE, IT'S REQUIRED

**Ivy B. Grey, David G. Ries, Joy Heath**

**Rush, Kelli Raker**

40 Jurisdictions have now implemented an ethical duty of competence in technology as provided in ABA Model Rule 1.1. This session will present an interactive panel discussion of your duty of technology competence, the importance of using the tools and skills you already have, and what more may be required. It will also explore the practical ramifications of the failure to do so.

11:15am - 12:15pm

### THE SECURITY CHALLENGE FOR MICROSOFT 365: IN PLAIN LANGUAGE YOU CAN UNDERSTAND

**Ben M. Schorr**

This session will demonstrate a step by step approach to improving security through configuring the important

settings of Microsoft 365. The presenter will explain the considerations supporting recommended settings in a manner that attendees with limited security backgrounds can understand.

2:00pm - 3:00pm

### MAC HACKS

**Brett Burney**

There are plenty of hidden features and shortcuts that Apple has built into macOS, ranging from keyboard commands to less than obvious settings. These small hacks can improve your workflow and make your Mac experience more customized. This session will highlight tips and tricks that you might not know.

3:15pm - 4:15pm

### I DIDN'T KNOW PDFS COULD DO THAT

**Daniel J. Siegel, Darla Jackson**

This session will focus on tips and tricks for attorneys and their support staff for using PDF tools, including the latest features, add-ins, etc. Adobe Acrobat DC will be the primary concentration, but other PDF tools will also be addressed. Features such as redaction and security measures to ensure privacy and confidentiality to address ethical considerations will be a focus of the session.

## FINANCIAL MANAGEMENT

10:00am - 11:00am

### BILLING 101 WITH TECH

**T. Jayden Doyé, Deborah J. Schaefer**

Billing is arguably the most important task in a law office, yet somehow it's often the last that lawyers focus on to their own financial detriment. Fortunately, billing is easier than ever with today's technology - and in this session, you'll learn basic strategies to make sure your billing runs like clockwork. Specifically, speakers will share tips on automating billing, coordinating billing and accounting and managing trust accounts so that you won't need or want to avoid sending bills out in the future.

11:15am - 12:15pm

### WEB3 AND LAW FIRM FINANCIALS

**Jessica Neer McDonald, Jamie Szal**

Web3 and the metaverse is finally making its way to law firms with modern, tech savvy clients now seeking to pay lawyers with cryptocurrency or through other alternatives made possible by blockchain technology in exchange for services. But these new forms of payment can raise tax and ethics traps for the unwary. In this session, we'll provide an overview of blockchain technology, cryptocurrency, and Web3 payment sources, and how this may relate to your law firm.

## FUTURES

10:00am - 11:00am

### THE FOURTH DIMENSION: LAW IN THE METAVERSE

Mathew Kerbis, Kristen G. Roberts, Diane M. Littlejohn

The metaverse is more than just a name or a game. The virtual world has been integrating with the physical world since the public introduction of the internet. As more people and businesses embrace the Metaverse, there will be a sharper focus the problems of data rights, data security, misinformation and platform power. The metaverse is estimated to generate as much as \$13 trillion in revenue a year by 2030 and other forecasters peg that number as between \$2.5 and 8 trillion. The GDP of the metaverse may eventually exceed that of "the physical world." This means there are legal transactions, disputes and a plethora of other opportunities for lawyers. Come learn what a metaverse is and what it could mean to your practice just around the (virtual) corner.

11:15am - 12:15pm

### ACCESSIBILITY IN LEGAL TECH

Haley Moss, Lisa Mueller

Developing tech from a universal design approach will make it more accessible. We can make our products and services more accessible for all by designing for disability at the forefront--rather than as an afterthought. What are the best practices for developing such approaches? Learn how to do this by attending this unique session that will touch on many disabilities—seen and unseen—among lawyers and the people we serve.

2:00pm - 3:00pm

### PRACTICING WITH BOTS: WHERE TO DRAW THE ETHICAL LINES?

Natalie Anne Knowlton, Jayne R. Reardon

Where is the line between the use of technology and the unauthorized practice of law? How could loosening ethical restrictions on attorneys sharing fees with non-lawyers affect tech adoption in the legal field? What data exists to show whether regulatory reform affects the access to justice gap or innovations in the legal space? Come learn about data coming from the regulatory reforms in some North American jurisdictions and what it could portend for practicing lawyers and technology companies alike.

3:15pm - 4:15pm

### WHERE'S THE MONEY?

Christopher Deutsch, Rich Lee, Kristen Sunday

Do you have a great idea for tech

adoption in the legal space but don't know how to develop a proof of concept or where to get funding? Do you wonder about the rules of investing in startups? Attend this session and hear directly from successful entrepreneurs and venture capitalists who will discuss their perspectives and the practical, legal and ethical ramifications of legal tech startups. You will go away with how-to's that you can immediately use.

## LITIGATION TECH

10:00am - 11:00am

### TRIALPAD, ADOBE AND OTHER TECHNOLOGY SOLUTIONS IN THE COURTROOM - DAY 1

Tara Cheever, Brett Burney

Why has the iPad become the go-to tool for legal representation? A lot had to do with Trial Pad. Learn to leverage TrialPad, Adobe, PowerPoint, Keynote, and more. This session will cover the hardware and software you need to be prepared, confident, and effective in the courtroom. Bring your iPad to this session and session 2 tomorrow.

11:15am - 12:15pm

### USING AI AND DATA ANALYTICS IN LITIGATION

Pablo Arredondo, Stephen Embry

This session will explore how recent advances in artificial intelligence (neural nets) and data analytics are being used to improve litigation outcomes. Attendees will learn about the latest breakthroughs and how they can be applied to information retrieval, case assessment and increasingly more complex tasks.

2:00pm - 3:00pm

### USING ZOOM IN THE COURTROOM EFFECTIVELY

Brian McCann, Charles Cole

Remote proceedings are no longer a new frontier. You may be required to transition your motion hearing and trial practice from the physical world to the virtual courtroom. Learn how to master a safe and effective virtual proceeding.

3:15pm - 4:15pm

### EVIDENTIARY USE OF THE TEMPORAL WEB

Nicholas Taylor, Joe Dugan

A key question for trial lawyers is when web content appeared online. Gaps in organizational recordkeeping, turnover in digital systems, and reliance on cloud services make historical web content particularly susceptible to loss. Web archives such as the Internet Archive Wayback Machine (IAWM) as well as other available free tools make it possible for litigators to ascertain when web content was published and how it has changed over time. In this session, we will review the capabilities and limitations of

IAWM with evidentiary use in mind and share other techniques for performing web archaeology.

## MARKETING

10:00am - 11:00am

### LEGAL MARKETING TRENDS: WHERE SHOULD YOU SPEND YOUR MARKETING RESOURCES?

Allison C. Johs, Gyi Tsakalakis

Every year, the ABA Legal Technology Resource Center conducts a legal technology survey of lawyers across the country, and one of the areas explored in the survey is the technology lawyers use in marketing their practices. What trends were revealed by the 2022 Legal Technology Survey? How are lawyers using technology to market their practices today? What opportunities can lawyers take advantage of to improve their marketing in 2023?

This session will discuss the results of the 2022 Legal Technology Survey on websites and marketing and show lawyers and law firms where they can take action to use technology to improve their marketing and business development efforts.

11:15am - 12:15pm

### #LETSPLAYBIG: POSITIONING TO STAND OUT

Conrad Saam, Rukayatu Tijani

Positioning for law firms can and should go well beyond gavels and the scales of justice. During this session we cover tenets of branding and positioning and highlight Ruky's firm which, as a black woman, pushes into the anti-stereotype of the Trademark Attorney, leading her the ultimate tagline: "I am What a Trademark Attorney Looks Like".

2:00pm - 3:00pm

### CREATING CONTENT THAT EARNS CLIENTS

Annette Choti

Creating content for your website and social media showcases your expertise, authority, and trustworthiness. Through this valuable content, your law firm positions itself as the primary and ultimate resource that helps answer legal questions. Learn how to effectively increase your law firm's digital footprint and online presence and ultimately convert potential clients to actual ones.

3:15pm - 4:15pm

### PUTTING CLIENT RELATIONSHIP SOFTWARE & DATA TO WORK

Thayne Brown

Putting client relationship management (CRM) software is a powerful tool and

data to automate and improve client experience. In this session, we'll explore different ways lawyers can leverage CRM software, as well as the data it generates, to improve client experiences, including, but not limited to, document preparation and communicating with clients.

## OPERATIONS

### 10:00am - 11:00am PROCESS MAPPING MADE EASY

**Danielle M. Hall, Jen Lee**

Process Maps are a particularly powerful tool for optimizing operations in any organization and law firms are no exception. Over the long term, the maps can be used for training and quality assurance but even the process of creating the maps tends to bring tremendous value. In this interactive workshop, attendees will learn how to create and apply process maps for their firm, bringing lawyers and staff into alignment utilizing technology to recapture lost efficiency.

### 11:15am - 12:15pm LAW FIRM 101

**Nkoyo-Ene Effiong, Cynthia Thomas, Emily Amara Gordon**

This session will cover the basics of starting a successful law firm. Whether you are a newly licensed attorney or leaving a larger firm, you will walk away with the essential tech tools to create a sustainable law firm.

### 2:00pm - 3:00pm STILL STRUGGLING WITH AI & AUTOMATION?

**Nicole Black**

This session will breakdown how solos can get started with AI and Automation. You will learn engineering workflows that will allow you to get back to practicing law while potentially saving you time and money. Find out the basic tools that can help you streamline your law practice from document assembly to billing and invoicing.

### 3:15pm - 4:15pm LAW FIRM EFFICIENCY OVERHAUL: OPTIMIZE YOUR TECH STACK FOR MAXIMUM PERFORMANCE

**Trevor Riddle, Alex Shahrestani**

Learn to take control of your technology, improve efficiency and grow your bottom line by implementing tech solutions that fit your firm's unique needs. Get an in-depth understanding of the different components of a tech stack, and what you need to know to make informed decisions when selecting and improving the technology stack for your firm.

## TRANSACTIONAL TECH

### 10:00am - 11:00am LEGAL OPS 101

**Lucy Endel Bassli, Catherine Sanders Reach**

Legal operations is a multidisciplinary approach combining engineering, data analytics, marketing, finance, learning and development to enable legal departments to best serve their clients. Join us for this session to hear from legal op experts on what technologies can best support your firm and how to evaluate all of the available solutions.

### 11:15am - 12:15pm LEAVING THE LAW FIRM FOR GREENER \$\$ PASTURES

**Andrea Sager, Greg Siskind**

Technology has expanded our abilities to serve the needs of potential clients and it is not a one size fits all solution. Join legal entrepreneurs to discuss how they revolutionized the delivery of legal services with their technology companies.

### 2:00pm - 3:00pm TECHNOLOGY ASSISTED REVIEW

**Kate Jansons Johns, John G. Loughnane**

There are tremendous opportunities for transactional practitioners to leverage technology to optimize outcomes. Technology Assisted Review (TAR) can deal with high volumes of data without increasing headcount. It can also use artificial or augmented technology to rapidly synthesize documents and prioritize attorney review. Determining contracts that need updated language, creating a "control center" for managing the due diligence process during M&A transactions, and executing real estate title reviews are just some examples of the type of projects that can be organized more efficiently using TAR. This session will review TAR options available and how to integrate them into your workflow.

### 3:15pm - 4:15pm TRANSACTIONAL WORD DOCUMENT AUTOMATION WORKSHOP, PART 1

**Kenton Brice, Ivan Hemmans, Barron K. Henley, Paul J. Unger**

Join us for this interactive workshop where world class facilitators will guide you through the process of automating your word documents to increase efficiency and accuracy and improve your overall performance.

Friday

03.03.23

## PLENARY

### 9:00am - 10:00am ATTORNEY RE-REGULATION: NOT JUST A YES OR NO PROPOSITION

**Lynda Shely, Darth Vaughn, Ed Walters, Jayne Reardon**

It's not just a game of red light or green light. We are attorneys, technology companies, academics and others in the legal landscape, so there is no better place than TechShow to explore the nuances of re-regulation and its possible effects on the future of the delivery of legal services. Do current attorney regulations impede the reach of legal services? Is there a connection between attorney regulations and the adoption and implementation of technology for the delivery of legal services? This interactive session will dive into policy considerations justifying—or not—amendments to the attorney regulations. Come prepared to consider the perspectives of various different stakeholders. Seating will be assigned and is limited.

## CLIENT EXPERIENCE

### 10:00am - 11:00am EFFECTIVE CLIENT COMMUNICATIONS: LEVERAGING TECH TO BETTER SERVE YOUR CLIENTS

**Emily Amara Gordon, Cynthia Thomas**

Communicating effectively with clients is vital to the success of your law practice. Not only does it lead to a more effective legal advocacy, it also improves the client experience, which can reduce your risk of grievances, and negative online reviews while improving your practice's net promoter score. Effective communication produces countless benefits for law practice and client alike. So how do you do it well without being tethered to your phone all day? In this session, learn how you can use communication services like WhatsApp Business, Asana, Front & Virtual Receptionists to meet your clients where they are and deliver an exceptional client experience without adding more hours to your work day.

### 11:15am - 12:15pm PREPARING FOR THE GLOBAL WORKFORCE: LEVERAGING TECHNOLOGY TO ADVANCE DEIA GOALS

**Charina Garcia**

The world has shifted. As globalization and technology continue to

breakthrough barriers, the clientele and legal needs are also changing. Now more than ever, Diversity, Equity, Inclusion and Accessibility (DEIA) is becoming less of a nice to have and more of a core principle for organizations that will thrive in the future of work. Legal professionals need to develop and adopt policies, practices, and structures that are fully inclusive. This session will spotlight ways that technology can assist legal professionals with running a more accessible and inclusive law practice and assist clients in furthering their DEIA goals.

**2:00pm - 4:15pm**

### **DESIGNING AN A+ CLIENT EXPERIENCE**

**Jessica Bednarz, Catherine Sanders Reach**

Join this hands-on workshop laser-focused on helping you leverage design thinking to gain clarity around your client personas and client journeys. This hands-on workshop will apply design-thinking practices to client-centered service models. During this session, you will go through each of the five steps of design-thinking.

## **CORE CONCEPTS**

**10:00am - 11:00am**

### **EMPOWER WITH AI: HOW AI COULD (AND PERHAPS ALREADY IS) CHARGING YOUR PRACTICE**

**Greg Siskind, Pablo Arredondo**

This session will address: 1) What Products have AI that Helps Lawyers; 2) How to get started with AI and what can it cost; 3) What roadblocks are there and how to avoid or address those bumps; 4) Addressing ethics concerns and being the boss of your AI.

**11:15am - 12:15pm**

### **WHAT'S UP WITH WORD**

**Barron K. Henley, Ben M. Schorr**

In this session the audience will explore some of the newer features available in Microsoft Word 365 and Microsoft Desktop.

**2:00pm - 3:00pm**

### **HACKS TO COMMAND AND CONTROL YOUR PC**

**Ivan Hemmans, Debbie Foster**

There are plenty of hidden features and tools that Microsoft has built into Windows, ranging from keyboard shortcuts to less than obvious settings. These simple commands and options can improve your workflow and make your PC experience less frustrating. This session will include discussion and demonstration of such tools and shortcuts.

**3:15pm - 4:15pm**

### **GETTING THINGS DONE: OVERCOMING PROCRASTINATION AND IMPLEMENTING TECHNOLOGY TO BETTER MANAGE YOUR TIME**

**Danielle M. Hall, Paul J. Unger**

This session will discuss why attorneys and other legal professionals procrastinate and suggest how technology can help address the problem and assist with developing better time management skills.

## **FINANCIAL MANAGEMENT**

**10:00am - 11:00am**

### **STARTING AND RUNNING A FLAT FEE PRACTICE**

**Regina Edwards, Ashley Pepitone**

By now, many lawyers and their clients recognize the benefits of flat fee billing's predictability, higher realization rates than the billable hour and administrative simplicity. Yet lawyers are still challenged in figuring out how to implement flat fee billing effectively, ethically and most of all, without going over budget.

In this session, the speakers will walk you through how to leverage technology to launch a successful flat fee practice. You will learn why some people try flat fees and are unsuccessful. You will learn the perspective of both a newer and highly experienced law firm owner who successfully rely on flat fee billing as the sole methodology for their practice and will share their secrets with you.

**11:15am - 12:15pm**

### **SUBSCRIPTION BILLING FOR LAWYERS**

**Mathew Kerbis**

As the billable hour begins to lose favor in the legal profession, many lawyers are looking to the subscription billing model to replace it. In this session, you'll learn: (1) the benefits of a subscription-based model (regular, predictable payments and creation of an ongoing relationship with clients) (2) how to develop a subscription-based program tailored for your clients (3) what type of technology to use to implement a subscription system and (4) applicable bar rules governing subscription billing. At the end of this session, we aim to have you subscribing to the subscription model.

**2:00pm - 3:00pm**

### **TAX STRATEGIES FOR SOLOS & SMALLS IN A DIGITAL AND WEB 3.0 WORLD**

**Jamie Szal, T. Jayden Doyé**

As law firms increasingly incorporate tech into their practice, they confront new issues related to tax compliance from paying virtual contractors (including

those overseas), tax treatment of advance flat fees and crypto payments, to appropriate tax deductions for tech tools. Lawyers have also raised concerns over taxes on their virtual services and the tech tools lawyers rely on. Our speakers will familiarize you with applicable tax requirements for firms doing business in a digital world and share their favorite tech tools to keep your firm compliant.

**3:15pm - 4:15pm**

### **ETHICALLY INCREASING LAW FIRM PROFITABILITY**

**Deborah J. Schaefer, Nkoyo-Ene Effiong**

It goes without saying that an unprofitable law firm won't survive. Yet many lawyers struggle to keep their firms in the black. In this session, the speakers will identify a combination of business strategies and technology hacks to help your firm go from surviving to thriving.

## **FUTURES**

**10:00am - 11:00am**

### **ETHICS OF ADA COMPLIANCE TECH**

**Haley Moss, Lisa Mueller**

Most states have adopted Comment 8 to Model Rule of Professional Conduct 1.1 requiring lawyers to understand the benefits and risks of relevant technology. It is also lawyers' obligation to know the Americans with Disabilities Act Standards for Accessible Design. Come to this session and learn about making your website, and more, accessible to those with disabilities.

**11:15am - 12:15pm**

### **NFTS AND WEB3: WHAT ARE THEY AND HOW DOES INTELLECTUAL PROPERTY LAW APPLY?**

**Diane M. Littlejohn, Kristen G. Roberts, Jessica Neer McDonald**

NFTs and Web3 projects have exploded in popularity, creating a confusing web of intellectual property disputes. This presentation will explore copyright and trademark issues in Web3 and NFTs, practical concerns for those who choose not to enter the Web3 space and unique opportunities for people of color to use NFTs to generate wealth.

**2:00pm - 3:00pm**

### **JUSTICE TECH: USING INNOVATION TO REDUCE THE ACCESS TO JUSTICE GAP**

**Natalie Anne Knowlton, Kelli Raker**

The gap between people who could benefit from legal services and those who receive them continues to widen. Many legal resources low and middle-income people need could be automated and delivered through technology. Accessibility is key. Come and learn from

the experts about how this is being done, including by establishing partnerships among law schools, tech companies and lawyers.

**3:15pm - 4:15pm**

### **DATA-DRIVEN TECH: WHAT'S YOUR ROI?**

**Joy Heath Rush, Allison C. Johns**

Tech surveys abound, but how can the findings be used by practicing lawyers to drive innovation and efficiency? We can't change our practice or process in response to each new survey. We need a wide angle and forward-looking lens. And we need a way to look at survey data that is meaningful. What outcomes do we want from innovation and tech? What data helps us achieve those outcomes? How do we measure success? This session will unpack and compare the findings from two of the primary tech surveys—International Legal Technology Association (ILTA) and LTRC's Legal Technology Survey. In this session, expert speakers will distill patterns and trends and discuss what it means for you and your practice in the coming years.

## **LITIGATION TECH**

**10:00am - 11:00am**

### **TRIALPAD, ADOBE AND OTHER TECHNOLOGY SOLUTIONS IN THE COURTROOM - DAY 2**

**Tara Cheever, Brett Burney**

Putting it all together. Dive in and practice with your iPad and your apps. This deep-dive workshop into courtroom technologies will answer all your questions about in-person and virtual presentation, including video editing and high-tech legal persuasion. Don't forget your iPad.

**11:15am - 12:15pm**

### **USING TECHNOLOGY TO TELL A STORY IN THE COURTROOM TECHNOLOGY**

**Charles Cole, Brian McCann**

Gone are the days when lawyers could haul expenses trial boards in to the courthouse. Attend this session to learn up-to-date tips for using Zoom, Adobe, TrialPad and other technology to tell a story that will captivate the jury and result in the judgments your clients deserve.

**2:00pm - 3:00pm**

### **ARMING AND DEFUSING NUCLEAR VERDICTS USING TECHNOLOGY**

**Steven Wood, Paul Motz**

Technology has become a standard tool for developing compelling narratives across the litigation lifecycle. Technology has also played an important role in producing and suppressing nuclear verdicts. This presentation will share

practical insights from a trial attorney and a jury consultant and discuss strategies to improve your persuasiveness in front of a jury.

**3:15pm - 4:15pm**

### **DOCUMENT RETENTION, LITIGATION HOLDS, AND EDISCOVERY BEST PRACTICES WITH EMERGING COMMUNICATION TECHNOLOGIES**

**Joe Dugan, Nicholas Taylor**

During the COVID-19 pandemic, many organizations adopted collaboration tools such as Zoom, Microsoft Teams, Slack, and Google Drive, among others. These tools made hybrid and remote work possible and are a central feature of intra-office communication. Employees are generating more written content than ever before, but organizations may overlook the litigation risk or the practical implications of retaining such content. In this session, we will brainstorm about best practices for counseling our clients on the retention/preservation of content generated through collaboration tools. We also will discuss ediscovery collection practices and we will consider the advantages and drawbacks of do-it-yourself collection versus working with a vendor. We will close with a discussion about proportionality principles and some potential evidentiary concerns.

## **MARKETING**

**10:00am - 11:00am**

### **LIGHTS, CAMERA, ACTION FOR CLIENT DEVELOPMENT**

**Temi Siyanbade, Stanley Tate**

Most small and solo law practices struggle with the best ways to increase their impact and manage their workflow. There is no shortage of potential solutions, but few are as impactful as video. Join us in this session, where we will uncover creative ways attorneys and legal professionals can use video to build brand authority, establish trust, and generate leads.

**11:15am - 12:15pm**

### **BRAND ACCELERATION WITH LINKEDIN**

**Rukayatu Tijani**

Do you find yourself saying these things about LinkedIn? "LinkedIn scares the bejesus out of me." "I don't have time to "build a brand" on LinkedIn." "I honestly don't know where to start on this platform." "Why do I even need a LinkedIn?" "The LinkedIn overwhelm is palpable."

Then this workshop is for you. Come join us for an exclusive and graciously candid conversation around how Trademark and Law Firm Founder Rukayatu ("Ruky") Tijani has optimized LinkedIn in a way that is

authentic, avoids overwhelm, and serves as a catalyst for major opportunities, including a Forbes feature, a Tory Burch Foundation Grant, and paid speaking roles.

In this workshop you will learn: the abundant variety of tools LinkedIn offers to share your story (because after all, these is no "one size fits all" approach to authentic storytelling); how to use LinkedIn analytics to inform your LinkedIn strategy; and the anatomy of an authentic and well received LinkedIn post. In the end, you'll walk away with actionable tools to #LeverageLinkedIn in a way that works for you.

**2:00pm - 3:00pm**

### **AVOIDING ETHICS VIOLATIONS IN YOUR DIGITAL MARKETING STRATEGY**

**Annette Choti, Thayne Brown**

Most states explicitly indicate that online marketing is a form of advertisement for law firms and therefore must comply with ethics rules. Learn how to avoid all types of ethics violations in your social media content and throughout your law firm's website.

**3:15pm - 4:15pm**

### **MARKETING IS A TEAM SPORT**

**Conrad Saam, Gyi Tsakalakis**

How attorneys can identify partners to expand their audience. We'll discuss podcasting, event sponsoring, review acquisition, and other ways lawyers can maximize their involvement in marketing while scaling with partners.

## **OPERATIONS**

**10:00am - 11:00am**

### **CREATING A SUCCESSFUL AND ETHICAL REMOTE/HYBRID LAW FIRM OF THE FUTURE**

**Nicole Black, John Burnett**

This session will cover the ethical issues related to working remotely during the pandemic and beyond. Ethics opinions from March 2020 to the present will be covered. A number of issues will be discussed, including how to ethically and securely work remotely using cloud-based software, cybersecurity recommendations when working virtually, the ethical issues presented when you work from a jurisdiction in which you're not licensed, and much more.

**11:15am - 12:15pm**

### **COUNTERING THE CYBERTHREAT TSUNAMI: START WITH THE BASICS**

**David G. Ries**

This session will address three of the greatest cyberthreats to attorneys and

law firms today – ransomware, spear-phishing, and business email compromise - and practical measures for law firms of all sizes to counter them. Start with the basics because Microsoft Security has recently reported that basic security hygiene protects against 98% of cyberattacks.

**2:00pm - 3:00pm**

**NO CODE, NO PROBLEM:  
UNLEASH THE POWER OF  
AUTOMATION TO TRANSFORM  
YOUR LAW FIRM**

**Trevor Riddle, Alex Shahrestani**

Learn how to prioritize, implement, and evaluate tech solutions that will not only save time and money but provide solutions for logistical longevity.

**TRANSACTIONAL TECH**

**10:00am - 11:00am**

**TRANSACTIONAL WORD  
DOCUMENT AUTOMATION  
WORKSHOP, PART 2**

**Kenton Brice, Ivan Hemmans, Barron K. Henley, Paul J. Unger**

Join us for this interactive workshop where world class facilitators will guide you through the process of automating your word documents to increase efficiency and accuracy and improve your overall performance.

**11:15am - 12:15pm**

**AUTOMATING THE  
TRANSACTIONAL CLIENT  
LIFECYCLE**

**Sofia Stefanie Lingos, Andrea Sager**

There are a multitude of tools and technologies to automate the client experience. Join us for this session where speakers will share the solutions they've found to automate the client lifecycle from the initial introduction through closing.

**2:00pm - 3:00pm**

**CONTRACT MANAGEMENT  
SYSTEMS**

**Lucy Endel Bassli, John G. Loughnane**

Contract Management Systems - CLM is the buzz of legal tech for corporate law departments. Law firms must understand contracting and automation in order to best serve their clients.

Many are asked to access their clients' contract management systems in order to support them; while others are handing overflow contracting without the right technologies to be efficient and data-driven. Speakers will discuss what is happening with CLM tech today; why there is such a frenzy of activity; how their clients are trying to improve their commercial contracting; and what roles law firms can play to help their

clients with the never-ending barrage of commercial contracting.

**3:15pm - 4:15pm**

**DOCUMENT MANAGEMENT  
AND COMPLIANCE**

**Kate Jansons Johns, Daniel J. Siegel**

During this session presenters will discuss how firms manage the volume and variety of documents flowing through their offices while maintaining both efficiency and compliance. This will include considering compliance issues affecting personally identifiable

information (PII) and personal health information (PHI), particularly HIPAA and state-based privacy laws like the CCPA, CPRA and the New York Privacy Act and best practices, processes and technology tools for law firms in adhering to these requirements.

# CLE Information

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Titles, sessions, descriptions, and speakers are subject to change. Please note all times listed are in Central Standard Time (CST).

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For any questions or concerns about registration, please email Lyndsey Kent at [kristin.thomas@americanbar.org](mailto:kristin.thomas@americanbar.org).

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