## Schedule of Events

### PIPE: Personal Injury Plaintiffs Idea Exchange

**Sunday, April 14 9:30 AM - 4:30 PM**

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

**Location / Room:** Ft. Worth 1-2

### Registration

**Sunday, April 14 Noon - 7:00 PM**

**Location / Room:** Center Prefunction

### Silent Auction

**Sunday, April 14 Noon - 7:00 PM**

**Location / Room:** Center Prefunction

### LFPAIE: Large Firm Principal Administrators Idea Exchange

**Sunday, April 14 12:30 PM - 4:30 PM**

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

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

**Location / Room:** Austin 3

### HRIE: Human Resources Idea Exchange

**Sunday, April 14 12:45 PM - 2:15 PM**

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

**Location / Room:** Grapevine 3-4

### IPIE: Intellectual Property Idea Exchange

**Sunday, April 14 1:00 PM - 2:15 PM**

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

**Location / Room:** Grapevine 5

### BOIE: Branch Office Managers Idea Exchange

**Sunday, April 14 1:00 PM - 2:15 PM**

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

Location / Room: Grapevine 6

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

*Sunday, April 14  1:00 PM - 2:15 PM*

Do you do it all in your firm of 1 to 30 attorneys? This idea exchange is for you! Join your peers to share ideas and issues relevant to running the business of the small firm. You will have an opportunity to determine the topics, which may include marketing, recruiting and small firm overhead.

Location / Room: Grapevine 1-2

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**CP/GVIE: Corporate and Government Idea Exchange**

*Sunday, April 14  1:00 PM - 3:00 PM*

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

Location / Room: Austin 1-2

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**LWIE: Leading with Inclusion Idea Exchange**

*Sunday, April 14  2:30 PM - 3:45 PM*

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

Location / Room: Grapevine 5

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**LFIE: Large Firm Idea Exchange (100+ Attorneys)**

*Sunday, April 14  2:30 PM - 3:45 PM*

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

Location / Room: Grapevine 6

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**Path to Certification**

*Sunday, April 14  2:30 PM - 4:30 PM*

Regardless of the stage in your career, certification adds a valuable dimension to your professional development. ALA's Certified Legal Manager (CLM)® program provides the opportunity to demonstrate you have mastered the knowledge, skills, and abilities to operate at a high level of expertise in the field of legal management. If you are wanting to learn more about the CLM® Exam, you won't want to miss this session.

Whether you are curious about the certification and want to know more, or you have already applied to take the exam and are not sure if you are ready yet, we can help. Please join us to learn everything from what the certification can do for you, understanding how to apply, the requirements for becoming and remaining certified, what courses to take during and after the conference, study groups available, meet others on the same journey, available resources such as the CLM® Study Guide and much more. As you requested, we have allocated more time and space to address all of your questions, before you decide what sessions to attend during the conference. This two-hour session has been designed to help you choose your Path to CLM® Certification.

Location / Room: Ft. Worth 5-7

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**SSSIE: Secretarial Support Strategies Idea Exchange**

*Sunday, April 14  2:30 PM - 4:30 PM*
What will we do when our secretaries retire? Where will we find the latest and greatest secretaries? The answers are right here with your ALA peers. Join your fellow ALA members for an idea exchange to problem solve the pipeline of legal secretaries. We will explore alternative models such as secretarial teams, including team captains and junior secretaries, to file clerks and job sharing. The role of the legal secretary has changed; what can we do as legal professionals to enhance this position? This is a session you do not want to miss.

**Location / Room:** Grapevine 1-2

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**INTIE: International Idea Exchange**

**Sunday, April 14 3:15 PM - 4:30 PM**

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

**Location / Room:** Grapevine 3-4

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

**Sunday, April 14 3:15 PM - 4:30 PM**

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

**Location / Room:** Austin 1-2

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**Business Partner Session: ALA Means Business**

**Sunday, April 14 3:30 PM - 4:30 PM**

This session is tailored exclusively for both new and seasoned business partners operating in the legal industry. The session is designed to be an interactive discussion that provides useful information for building engagement with attendees both at conference and back at the office. You'll also be given key insights into the current trends and challenges facing legal organizations every day in the business of law.

**Objectives:**

- Brief ALA History, ALA Demographics, Conference attendee demographics
- Best Practices for engagement during conference and post conference
- Hot Trends in Legal

**Speakers:** Members of ALA's [Business Partner Relations Project Team](https://www.alacp.org) (BPRT)

**Other Information:**

- 60 Minutes

**Location / Room:** Dallas 5

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**Exhibit Hall Hours**

**Sunday, April 14 5:00 PM - 7:00 PM**

**Location / Room:** Longhorn DEF

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**Exhibit Hall Welcome Reception**

**Sunday, April 14 5:00 PM - 7:00 PM**

Sponsored in part by [ABA Retirement Funds](https://www.abafunds.org).

Celebrate the Exhibit Hall's opening with business partners and peers in law office management. Wear your finest western gear as you meet and greet friends old and new, learn a line dance and enjoy Texas barbecue and a fine local beverage.

This is also when [Clean the World](https://www.cleantheworld.org), our community service event, takes place with attendees and exhibitors working together to assemble hygiene kits to be sent to a country in need. We built 800 kits in 2018 — we are challenged this year to put together 1,200 kits!
Healthy Start: Yoga

Monday, April 15 6:00 AM - 6:45 AM

Yoga is a Hindu spiritual and ascetic discipline, including breath control, simple meditation, and the adoption of specific bodily postures, is widely practiced for health and relaxation. Start your day with a strong sense of wellbeing.

Location / Room: Outdoor Pool Area

Healthy Start: Walk

Monday, April 15 6:00 AM - 6:45 AM

Join your colleagues with a breath of fresh air and an invigorating walk to get you ready to start your day.

Location / Room: Hotel Main Lobby

Friends of Bill

Monday, April 15 6:15 AM - 6:45 AM

Location / Room: San Antonio 1

Registration

Monday, April 15 6:30 AM - 5:00 PM

Location / Room: Center Prefunction

Silent Auction

Monday, April 15 6:30 AM - 5:00 PM

Location / Room: Center Prefunction

Newcomers Connection Breakfast

Monday, April 15 7:00 AM - 8:00 AM

Sponsored in part by Thomson Reuters.

Is this your first Annual Conference & Expo with ALA? Then you are cordially invited to join your ALA leaders for breakfast in the Exhibit Hall.

Location / Room: Longhorn DEF

Kick-off Breakfast with CLM Recognition

Monday, April 15 7:15 AM - 8:15 AM

Becoming a Certified Legal Manager (CLM)® is no easy feat — that’s why we’re celebrating them! All attendees* are invited to breakfast before the Opening General Session and Keynote on Monday morning. CLMs will enjoy reserved seating near the front of the room and be treated to a full-service breakfast at their table. All others in attendance are welcome to a self-serve continental breakfast at the buffet.

*First-time attendees have their own breakfast during this time with ALA Leaders. See schedule for details.

Location / Room: Texas Ballroom

CM10: Keynote: Leading the Way: Inspiring Go-Getters and Game Changers
Monday, April 15  8:15 AM - 9:45 AM
Sponsored in part by Thomson Reuters.

In order to lead, you have to inspire people to want to follow. A true leader knows that leadership extends beyond self. From the arenas of professional sports to the boardrooms of major companies, Molly Fletcher shares what drives top leaders and how they inspire collective success.

Objectives:

- Connect versus communicate and create a culture of feedback.
- Lead through change and adversity.
- Hire and retain talent with a focus on growth mindset.
- Inspire self-accountability and a culture of success.

Other Information:

- 60 Minutes
- Audience: Essentials
- CLM Application Eligible: No
- CLM Recertification Eligible: Yes

Speaker Info:

Molly Fletcher is a trailblazer — a rare talent of business wisdom, relationship brilliance and unwavering optimism. As a Chief Executive Officer, she shares her unconventional and unique techniques that made her one of the first female sports agents in the high-stakes, big-ego world of professional sports and now a successful entrepreneur. Fletcher spent two decades as one of the world's only female sports agents.

She has been featured in ESPN, Fast Company, Forbes and Sports Illustrated. She is the author of four books and the founder of an e-learning platform that provides personal and professional development content for individuals and companies. Fletcher has been recognized by Michigan State University with the Outstanding Alumni Award and has received numerous other awards. Fletcher earned a bachelor's degree in communications from Michigan State University while captaining the women's tennis team. She finds her greatest joy at home in Atlanta with her husband, Fred, and their three daughters.

Location / Room: Texas Ballroom

Exhibit Hall Hours

Monday, April 15  9:30 AM - 4:00 PM
Location / Room: Longhorn DEF

Exhibit Hall Coffee Break

Monday, April 15  9:45 AM - 11:15 AM
Location / Room: Longhorn DEF

Recharge Your Health: Deep Sleep

Monday, April 15  10:15 AM - 10:30 AM
Join Lance Breger in the Recharge Your Health Lounge in the Exhibit Hall and experience the Wellness Lab, NEW this year!

Location / Room: Exhibit Hall Booth 1235

BP10: How to Finance Tech for State-of-the-Art Security

Monday, April 15  10:30 AM - 11:00 AM
By CoreTech Leasing

Rapid changes to the IT landscape and increasing cyber security needs are driving IT budgets upwards. How can your firm run a state-of-the-art IT department without breaking the bank? Financing and leasing solutions allow IT to convert large cash expenditures to a monthly expense, remain flexible, preserve cash flow and much more.

Join Barry Steel, Sr. VP of Sales and Marketing at CoreTech Leasing, and learn how leasing can give firms the quick decision-making they need and the pitfalls to avoid when considering entering a relationship with a lessor.
Speaker:

**Barry Steel**, Senior Vice President, Sales and Marketing at CoreTech Leasing, has an impressive record of achievement in multiple, highly competitive markets for over 25+ years. Steel was most recently President of Capital Fleet Solutions, which consulted with several commercial banks in the automotive dealer space and included a total portfolio of 500,000 vehicles. Prior to Capital Fleet Solutions, Steel was the Senior VP of Global and Strategic Accounts for Donlen Corporation, where he designed and executed strong strategic visions that resulted in being acquired by Hertz Corporation for a record valuation. Stell also served as VP of SalesForce Development for GE Capital Fleet Services for nearly a decade, where he developed programs to track sales, customer satisfaction, and coordinated pricing across the business. His leadership skills are great assets to the CoreTech Team.

**Location / Room:** Solutions Hub A

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**BP11: Records Management for Legal Professionals: What Are the Rules?**

**Monday, April 15 10:30 AM - 11:00 AM**

*By Access*

Lawyers aren't immune from the need for good information governance. Professional ethics and risk management require a law firm or law department to develop sound practices from throughout the life cycle of any matter. This session examines the ethics of matter file management within the context of sound governance principles.

**Speaker:**

John C. Montaña J.D., FIIM, FAI

**Location / Room:** Solutions Hub B

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**BP12: Industrial Revolution Comes to Legal**

**Monday, April 15 10:30 AM - 11:00 AM**

*By Hilltop Consultants, Inc.*

Law firms have long perceived themselves as artisanal companies. In many ways, it mirrors the way automotive manufacturers saw themselves in the days just before Henry Ford. With the availability of AI, SaaS, and Managed Services, the legal industry can take advantage of the industrial processes that multiply profit margins by boosting efficiency. Join us to discover how!

**Speaker:**

Clayton Romero

**Location / Room:** Solutions Hub C

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**CM12: The Livelihood Wheel**

**Monday, April 15 11:15 AM - 12:30 PM**

Goals create alignment, clarity and direction. Yet those who set them rarely check back to measure progress. This session is all about you. Using a wheel of livelihood, we will explore your personal path to fulfillment and set goals for your desired focus points. Oh, and a little accountability to nudge you forward.

**Objectives:**

- Understand learning goals and performance goals.
- Create personal goals for areas of your life that are your choice.
- Develop an accountability system to move you forward.

**Other Information:**

- 75 Minutes
- Audience: Intermediate
- CLM Application Eligible: Yes
- CLM App Management Category: Self-Management Skills
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- SHRM: Communication
- SHRM Learning Format: Instructor-Led Activity
- CPE Field of Study: Personal Development

**Speaker Info:**
Judy Hissong, CLM, PCC, is the President of Nesso Strategies and Founder of the Legal Leadership Institute. Nesso is the Italian word for connection, and connecting strategies is Hissong's passion. Her financial background pairs with her athletic mindset and her executive coach training as she partners with law firm professionals for strategic planning, leadership development, executive coaching, team building, and training in conflict and communication skills. She has more than a decade of law firm leadership experience, giving her an insider's understanding of the complexities of the business of law.

Location / Room: Grapevine 1-3

CM11: Platform Power: How to Electrify Every Meeting, Every Time

Monday, April 15 11:15 AM - 12:45 PM

You are expected to have impeccable presentation skills that build client service, transfer information and ignite action. Does your content compel people to take action on your message? Can you speak extemporaneously with ease? Do clients and partners request that you continually address their group because of your compelling platform skills? The tools needed to succeed every time are learned skills and must be continually polished to stay on the cutting edge. This session will lift you to the next level of presentation success, whether you are a polished presenter or hate even the thought of presenting.

Objectives:
- Demonstrate a strong vocal and visual presence.
- Recognize the reason that you never end with Q&A.
- Practice looking and feeling in control, even when the audience pushes you off track.
- Use a process to cut presentation planning by half.
- Assemble every presentation without any preparation.

Watch a short promo video of this session.

Other Information:
- 90 Minutes
- Audience: Essentials
- CLM Application Eligible: Yes
- CLM App Management Category: Communication Skills
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- SHRM: Communication
- SHRM Learning Format: Instructor-Led Activity
- CPE Field of Study: Communications

Speaker Info:

Marsha Petrie Sue is an international professional speaker, best-selling author and executive coach. She works with associations, public and private enterprises, and government organizations tailoring presentations and workshops on change management, leadership development, communications and conflict resolution. Her high-energy, interactive style leaves the audience with tips and skills that will immediately carry over to their work situations, translating to reduced stress and adding to the bottom line.

Location / Room: Grapevine A

FM10: Costly Surprises: Hidden Tax Liabilities for Law Firms and How to Avoid Them

Monday, April 15 11:15 AM - 12:45 PM

This fast-paced session will cover a lot of very important, relevant and, most importantly, law firm-specific tax issues. Some of the areas we will cover are client costs, settlements and 1099 reporting, consequences of negative capital accounts (or retained deficits), unreasonable compensation, multistate filing issues, unapplied cash, stock in lieu of fees and the two types of phantom income. We will also discuss any recent updates or guidance from the IRS on tax reform.

Objectives:
- Recognize the specific tax issues facing your firm.
- Identify potential issues from recent tax reform.
- Review recent updates or guidance from the IRS on tax reform.

Other Information:
HR10: How to Create and Implement a Successful Mentor Program

Monday, April 15 11:15 AM - 12:45 PM

This session is a step-by-step guide to designing, implementing and managing an effective and measurable program for mentoring associates. A well-designed and well-managed mentoring program can have a major positive impact on the career development and retention of associates. In this 90-minute presentation, you will take a deep dive into the critical basics of designing and implementing a measurable mentoring program and discover proven best practices your firm can use to make your program more effective, develop more capable associates and improve associate retention.

Objectives:

- Define the necessary steps to developing a mentoring program.
- Recognize the time and talent needed to create a successful program.
- Identify compensation considerations for the mentor and the mentee.
- Describe how to establish and evaluate measurable benchmarks.
- Review how to maintain the ongoing success of the program throughout the generations.

Other Information:

- 90 Minutes
- Audience: Essentials
- CLM Application Eligible: No
- CLM App Management Category -FS: Human Resources Management
- CLM Recertification Eligible: Yes
- HRCL: General Credit
- SHRM: Communication
- SHRM Learning Format: Instructor-Led Activity
- CLE: Participatory Credit
- CPE Field of Study: Personnel/HR

Speaker Info:

Derek Barto is a Principal in Armanino’s Law Firm Services Group where he spends 100% of his time consulting with law firms. He provides consulting services on critical issues that law firm managers encounter, including advising on partner compensation methodologies, merger and acquisition analysis, firm start-ups, restructuring, profitability improvement analysis, and analyzing and benchmarking data in comparison with industry statistics.

Barto’s clients range from start-up law firms with less than 10 attorneys to multi-office firms with over 100 attorneys operating in multiple states. He also manages tax return and financial statement engagements for his law firm clients.

Ragan McCoy is a Senior Tax Manager at Armanino in Dallas, TX. She has a solid history of providing guidance to businesses and individuals in making important decisions related to limiting tax exposure and maximizing cash flow. Clients recognize that tax planning is a crucial factor in achieving many aspects of their financial goals, from wealth management to business building to retirement planning. McCoy provides her clients with the knowledge and tools to implement strategies tailored to their professional and personal objectives. McCoy received her B.S. in Accounting & Information Management and M.S. degrees in Business Administration with a concentration in Taxation from the University of Texas at Dallas. She is also a Certified Public Accountant in the state of Texas.

Location / Room: Grapevine D

HR11: Preventing Workplace Violence: Managing the Troubled Employee

Monday, April 15 11:15 AM - 12:45 PM

Presented by lead legal counsel for several Fortune 500 threat management teams, this program is a multidisciplinary examination of best practices concerning workplace violence prevention. Behavioral, legal and managerial considerations will be examined, with a
specific emphasis on the role of the human resources professional within the workplace violence prevention team structure. Law and policy concerning social media monitoring, recent disability law developments concerning troubled employees, and the termination of dangerous individuals will be reviewed.

Objectives:

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

Other Information:

- 90 Minutes
- Audience: Advanced
- CLM Application Eligible: No
- CLM App Management Category -FS: Human Resources Management
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- SHRM: Critical Evaluation
- SHRM Learning Format: Instructor-Led Activity
- CLE: Participatory Credit
- CPE Field of Study: Business Management & Organization

Speaker Info:

Glen Kraemer, JD, is a Founding and Managing Partner of the employment law firm Hirschfeld Kraemer LLP. The firm focuses exclusively on the representation of employers concerning discrimination and harassment claims and personnel law compliance issues involving disability accommodations, wage/hour concerns, protected leaves, corrective counseling, and discipline and termination practices. He served as the keynote speaker for the Professionals in Human Resources Association's Annual Legal Update Conference for 18 consecutive years.

Location / Room: Texas 1-3

OM10: Cyber Scenario: Simulated Firm Attacks: Cybersecurity Track (Session 1)

Monday, April 15 11:15 AM - 12:45 PM

A response plan solely focused on and run by IT is destined to fail. An effective response involves all aspects of the organization, including the chief executive officer, human resources, general counsel, media relations and IT, among many others.

Objectives:

- Discover a deeper understanding of what is involved and who needs to be involved, the timeliness, and possible legal issues in regard to a cyber incident.
- List tips for the audience to develop incident response plans.
- Express a better understanding on how to respond to a cyber incident.

Other Information:

- 90 Minutes
- Audience: Advanced
- CLM Application Eligible: No
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Management Advisory Services

Speaker Info:

Rob Kleeger is the Founder and Managing Director of Digital4nx Group, Ltd., a boutique firm that offers regional digital forensics services for plaintiffs and defendants in various civil and criminal legal matters. Digital4nx Group provides digital forensic investigations, electronic-discovery consulting and advisory service, incident response to data breaches, and cybersecurity services, such as ethical hacking.

Joe Riccie is a CPA with more than 35 years of financial, human capital, operational and technology management experience collectively while working in the private and public accounting industries. He is the Market Leader for two advisory practices that concentrate on cloud software solutions and management consulting and cyber and information security services. Riccie is a Certified Public Accountant in the states of New Jersey and New York. He is a member of the New Jersey Society of Certified Public Accountants and the New York State Society of CPAs. He speaks and publishes on topics covering technology, building advisory practices and cybersecurity.

Location / Room: Texas 4-6
OM14: Outsourcing IT Functions: Is It a Good Idea? | Brought to you by ALT (the Association of Legal Technologists) (Session 1)

Monday, April 15 11:15 AM - 12:45 PM

With the rising costs of keeping IT in-house, many law firms and departments have opted to outsource their IT needs. Is this a viable decision? What are the associated costs? What is the outsourcing process? How do you manage and prioritize outsourced IT options? This session will discuss the insourcing vs. outsourcing dilemma and accompanying pros and cons.

Objectives:

• Discuss the costs associated with outsourcing IT.
• Illustrate how to implement an outsourcing IT campaign.
• Identify how to manage an outsourcing IT campaign.
• Assess which products to prioritize and why (costs, importance, etc.).
• Compare the pros and cons of insourcing vs outsourcing IT.

Other Information:

• 90 Minutes
• Audience: Essentials
• CLM Application Eligible: No
• CLM App Management Category -FS: Operations Management
• CLM Recertification Eligible: Yes
• CLE: Participatory Credit
• CPE Field of Study: Management Advisory Services

Speaker Info:

Marco Maggio is the Vice President of Strategic Practices at All Covered, a Konica Minolta company, and is responsible for the legal, health care, finance and education practices. As the former Director of the Legal Practice for the past five years, he retains the strategy, marketing and education of the national legal practice at All Covered. He currently manages a portfolio that ranges from IT services, various legal technologies, VoIP, legal DMS sales and integration, as well as cybersecurity for law firms. Maggio holds degrees in industrial engineering, marketing and communication arts. He held executive leadership positions at organizations such as Lanier, Mosaic, Ricoh and Hewlett Packard and is a regular speaker for legal industry associations and a regularly published author for technology relevant to the legal industry.

Location / Room: Grapevine 4-6

Exhibit Hall Lunch

Monday, April 15 12:15 PM - 2:00 PM

Sponsored in part by Rippe & Kingston.

Location / Room: Longhorn DEF

BP13: The Tipping Point for Legal Back-Office Operations and Support Services

Monday, April 15 12:30 PM - 1:00 PM

By BigHand

The legal market is undergoing the most significant change in a generation; one that requires law firms to fundamentally redefine their operations. Championing operational excellence in the back office, BigHand brings you data from the latest legal support services research, as well as case studies from DLA Piper and Pinsent Masons, two firms that have driven meaningful change to achieve visibility, enhanced operational performance, improved client service, and reduced costs.

Speakers:

Eric Wrangler, President
Ben Jennings, Commercial Products Director

Location / Room: Solutions Hub A

BP14: Trends in Optimizing Law Firm Real Estate

Monday, April 15 12:30 PM - 1:00 PM
By Savills

There are many aspects of a law firm’s lease which contribute to its true cost of real estate, many of which are hidden. Join Savills’ law firm real estate experts Shay Bolton and Lisa Davidson for a discussion of what goes in to "total occupancy cost," and techniques firms can use to manage it.

Speakers:

Shay Bolton, Managing Director, Savills, Los Angeles – West LA
Lisa Davidson, Vice Chairman, Director, Savills Chicago Office

Location / Room: Solutions Hub B

BP15: Profitability Pitfalls and How to Modernize Your Firm’s AR Department

Monday, April 15 12:30 PM - 1:00 PM

By Headnote

Most law firms are struggling with cash flow and their uncollected Accounts Receivables (“AR”) despite having great attorneys, smart staff members, and loyal clients. Learn what separates high performing firms from the pack with some easy strategies administrators can implement to help collect more AR in 2019.

Speaker:

Sarah Schaaf, CEO, is an attorney with payments and law firm operations expertise. Schaaf was a litigator at firms in San Francisco prior to taking an in-house role at Google's legal department. She left Google in 2014 to become an entrepreneur, and is currently the founder and CEO of Headnote, the fastest growing ePayments company in the legal industry. She is an active member of several entrepreneurial and FinTech groups in Silicon Valley, including NFX Guild and Commerce Innovation League, and is also a regular podcast guest and legal conference speaker.

Location / Room: Solutions Hub C

Meet Your Chapter Leader Resource Team

Monday, April 15 12:30 PM - 1:45 PM

All chapter leaders are invited to participate in one of the two Meet the Chapter Resource Team sessions. During these sessions, attendees will have the opportunity to meet with the team and share thoughts on how it might best serve ALA chapters.

The first session is Monday, April 15, 12:30-1:45 p.m. The second is Wednesday, April 17, 11:45 a.m.-1 p.m.

IMPORTANT: since both session options are scheduled at the same time as lunch, a buffet will be available outside the session room on a first come, first served basis.

Location / Room: San Antonio 4-6

BB10: Clear the Decks, You Have Something to Say: Harnessing the Power of Active Listening

Monday, April 15 12:45 PM - 1:00 PM

Thirty-four gigabytes — that’s how much data the average American consumes daily. This averages to 100,000 words and images. Most individuals speak 120-180 words a minute, yet most listeners process up to 500 words per minute. No wonder it is so easy to become distracted, even when we give it our best effort to hear what others are saying. Join this discussion to learn the top three steps you can take to sharpen your listening skills to be better understood, to become a more effective leader and a more persuasive speaker.

Speaker Info:

Kimberly Rice is the President/Chief Strategist of KLA Marketing Associates, where she and her team provide strategic business development advisory services to legal services professionals seeking a more fulfilling and prosperous enterprise. Rice is the author of Rainmaker Roadmap: A Step-by-Step Guide to Building a Prosperous Business and a frequent speaker to business and legal groups and associations.

Location / Room: Ft. Worth 5-7
Recharge Your Health: All-Day Energy

Monday, April 15  12:45 PM - 1:00 PM
Join Lance Breger in the Recharge Your Health Lounge in the Exhibit Hall and experience the Wellness Lab, NEW this year!

Location / Room: Exhibit Hall Booth 1235

BB11: Three Elements That Combine to Create a Supercharged Innovation Mindset

Monday, April 15  1:00 PM - 1:15 PM
Innovation is simply practical creativity: Put known elements together in a new fashion and find a practical use or problem to solve. Voila! You are an innovator. There are three elements that help innovation flourish: fluency (many ideas), flexibility (seeing things from many perspectives), and originality (seeing something as unique or novel). Come and be introduced to these elements and leave with an easy-to-use formula for innovation success.

Speaker Info:

Izzy Gesell is an "organizational alchemist" who helps people navigate their internal logjams to emerge confident, spontaneous and effective. Through keynotes, breakouts, coaching and facilitated sessions, Gesell offers imaginative, intuitive and immediately useful insights and programs. Among the first to use improv concepts as tools for personal and organizational learning, he is the author of Playing Along: Group Learning Activities Borrowed from Improv Theater.

Location / Room: Ft. Worth 5-7

BB12: Redirecting Negative Behavior

Monday, April 15  1:15 PM - 1:30 PM
Challenged by poor behavior? Need to turn around disengaged and poor performing people? Tired of harshness and permissiveness in reaction to it? What do you do, think and say when people annoy, anger, hurt, worry or insult you? Participants will learn about redirect, an alternative to harshness, punishment, permissiveness, or bringing to effect positive change when faced with under-performance and counter-productive behavior. This presentation is for anyone challenged with poor behavior, who wants an effective resolution that preserves the dignity of all involved and improves relationships and a sense of community.

Watch a short promo video of this session.

Speaker Info:

Judy Ryan has been the owner of LifeWork Systems, an award-winning training and consulting company specializing in leadership development and culture change, since 2002. She is the recipient of the Women of Distinction award and the Vanguard Award for Innovation in Service Delivery from the St. Louis Mental Health Board. Ryan is an author, columnist, consultant, trainer, coach and keynote presenter, with guest appearances on TV and radio.

Location / Room: Ft. Worth 5-7

Recharge Your Health: Express Chair Stretching

Monday, April 15  1:15 PM - 1:30 PM
Join Lance Breger in the Recharge Your Health Lounge in the Exhibit Hall and experience the Wellness Lab, NEW this year!

Location / Room: Exhibit Hall Booth 1235

BP16: 5 Cloud Questions Your Partners Expect You to Answer

Monday, April 15  1:15 PM - 1:45 PM
By Tabush Group
Every day your firm is being faced with questions about cloud, and the partners expect you to know the answers. In this session, we will discuss the 5 things your partners will definitely ask and what the great answers are that you can provide them.

Speaker:

Darragh Fitzpatrick is Partner & Executive Vice President at Tabush Group, primarily focusing on system architecture, account management, and business development. He has more than 20 years of experience in IT and is an avid technologist with extensive experience speaking on cybersecurity and the cloud. Originally from Ireland, Fitzpatrick has a Bachelor of Science degree in Computer Science from the University of Greenwich in London (UK).

Location / Room: Solutions Hub A

BP17: Key Consideration to Choosing the Right Cloud Partner

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

By ProCirrus Technologies

Making the move to the cloud is the right choice, but not all cloud providers are the same. We discuss the key things you need to consider and expect from your cloud partner.

Speaker:

In addition to over 20-years in sales, consulting, training and technology, Ronny Loew has worn hats from temporary office staff to business owner. This has helped him develop an in-depth understanding into how professionals consume and interact with technology as well as how to get the most from an IT budget. When consulting with decision makers, he translates the complexities of technology into plain terms, educates and assists in making beneficial choices for the firm. Ronny has been with ProCirrus since 2011. During that time, he has been instrumental in the establishment of ProCirrus’ reputation as a leader in cloud hosting for professional services firms with a focus on law firms. ProCirrus has grown to support hundreds of firms across the US and abroad. He has also established working relationships with Affinity Consulting Group, Thomson Reuters, STI – TABS & Practice Master, Lexis Nexis, Abacus Next, Needles, Worldox, Coyote Analytics, Orion, CaseAware, and a growing list of others.

Location / Room: Solutions Hub B

BP18: The Litigation Technology and Expertise You Need, When You Need It

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

By Elite Document Technology

Integration of advanced legal technology to attain greater efficiency during discovery offers law firms a way to provide substantial value to their clients. During this session, learn how you can lower your operational expenses, reduce costs to your clients and optimize your discovery processes while improving technology resources through an eDiscovery Managed Service.

Speaker:

Terry Reeves, CEO

Location / Room: Solutions Hub C

BB13: Breaking Through the BS: Consciously Shaping Your Story from Lies to Legendary

Monday, April 15  1:30 PM - 1:45 PM

We are all guilty of some level of cognitive dissonance — imagine the story you tell yourself about being in control of your eating habits as you grab that second donut. When our beliefs don't match our behaviors, we allow our subconscious brains to justify our actions. We make up a story (I’ll work it off at the gym later) or change our original value statements (I never wanted to lose those 5 pounds anyway!). Only when you sit with the discomfort and vulnerability that self-awareness brings will you be able to consciously create your path toward greatness.

Speaker Info:

Rebecca Heiss, PhD's style — alongside her expertise in human behavior and evolutionary psychology — brings her audiences along for an enlightening journey into our own minds. After earning a PhD with research designated as "transformative" by the National Science Foundation, Heiss went on to hold multiple appointments in academia, applying her research to solve practical problems in overcoming what she refers to as "biological ghosts," subconscious behaviors that haunt modern life.

Location / Room: Ft. Worth 5-7
FM11: Best Practices in Support Staff Leverage: How to Run a More Efficient Law Firm and Improve Profit Margins While Maximizing Staff Productivity

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

Things have changed, and our clients are demanding that we do better, faster and, in many cases, cheaper. We are focused on seeking saving methods through efficiency and productivity and consequently are looking outward to see how others are doing it. In this session, we will explore benchmarking along with real examples from firms that have been able to change their staffing, using leverage to deliver more to their clients. We will discuss what worked and what didn't work.

Objectives:

- Recognize the concept of benchmarking and how useful it can be in assessing efficiency and productivity.
- Identify how to apply benchmarks to staffing roles to identify skills and training needed for effectuating change.
- Examine case studies of firms and practice areas using the right staff for the right work and how they got there.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM Application Eligible: No
- CLM App Management Category -FS: Financial Management
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- SHRM: Business Acumen
- SHRM Learning Format: Instructor-Led Activity
- CLE: Participatory Credit
- CPE Field of Study: Finance

Speaker Info:

Derek Barto is a Principal in Armanino's Law Firm Services Group where he spends 100% of his time consulting with law firms. He provides consulting services on critical issues that law firm managers encounter, including advising on partner compensation methodologies, merger and acquisition analysis, firm start-ups, restructuring, profitability improvement analysis, and analyzing and benchmarking data in comparison with industry statistics.

Barto’s clients range from start-up law firms with less than 10 attorneys to multi-office firms with over 100 attorneys operating in multiple states. He also manages tax return and financial statement engagements for his law firm clients.

Terri Oppelt, CLM, SPHR, SHRM-SCP, is a Director in Armanino's Law Firm Services group. Oppelt consults in all areas of law firm management and operations, including strategic planning, compensation, accounting operations and billing, administration support strategies, HR and leadership, organizational change, training and retreats. As a Past President of the Greater Los Angeles Chapter of ALA, she is a frequent speaker for ALA and is a new member of the Professional Development Advisory Committee. Oppelt holds a bachelor's degree in management from Pepperdine University.

Location / Room: Grapevine D

HR12: Do You Have a Prescription for a Healthy Environment?

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

Lawyers lead the nation among professionals with the highest rates of depression. The ABA estimates that 15 to 20 percent of lawyers suffer from alcoholism or substance abuse. Law firms are also likely to have high rates of verbal abuse, mistreatment, bullying, excessive competition and sexual harassment. While many firms are focused on resilience strategies, law firms need to adopt primary prevention strategies to address the causes of toxic behavior in the workplace.

Objectives:

- Define techniques to recognize oppressive work environments.
- Identify stress management options and training methods as prevention strategies.
- Discuss current best practices among law firms of various sizes.
- Review specific implementation issues based on real-world examples.

Other Information:

- 75 Minutes
- Audience: Intermediate
- CLM Application Eligible: No
- CLM App Management Category -FS: Human Resources Management
- CLM Recertification Eligible: Yes
- CLM Recertification: Substance Abuse
- HRCI: General Credit
- SHRM: Consultation
Objectives:

- Discover how to implement the top engagement drivers and identify which ones you need to focus on the most to create a motivated and high-performance team.
- Recognize how to increase motivation with three simple questions that will connect purpose to pay by creating a clear line of sight between what employees do and how it affects the organization.
- Develop a four-step formula for giving feedback that takes the stress out of addressing subpar performance and drives complacency from the workplace.
- Indicate how to use the recognition codes to reward and recognize your employees so they feel valued, appreciated and inspired.

Other Information:

- 75 Minutes
- Audience: Essentials
- CLM Application Eligible: Yes
- CLM App Management Category: Organizational Development
- CLM App Management Category -FS: Human Resources Management
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- SHRM: Communication
- SHRM Learning Format: Instructor-Led Activity
- CLE: Participatory Credit
- CPE Field of Study: Personnel/HR

Speaker Info:

**James Robbins** is a rare mix of management consultant, change specialist, adventurer and motivational speaker. He speaks to audiences worldwide, helping them raise their performance to match their potential. He has been helping equip and transform leaders for more than 20 years. In 2012, Robbins wrote *Nine Minutes on Monday: The Quick and Easy Way to Go From Manager to Leader*. His style of teaching has set him apart as a master communicator, combining stories from his adventures with practical truths that help audiences make simple changes that stick.

Location / Room: Grapevine C
Identify the types of drills and exercises that should be conducted in all firms to ensure safety and security.
Create a take-home firm data security checklist to frequently verify your sensitive data is secured.
Recognize the requirements for identifying and segregating protected health information within client files.
Prepare for a client data security audit, but make information security part of your daily routine.

**Other Information:**
- 75 Minutes
- Audience: Advanced
- CLM Application Eligible: No
- CLM App Management Category -FS: Operations Management
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- SHRM: Critical Evaluation
- SHRM Learning Format: Instructor-Led Activity
- CLE: Participatory Credit
- CPE Field of Study: Business Management & Organization

**Speaker Info:**

**David Constantine** is a Compliance Projects Manager with Logical Computer Solutions in Mobile, Alabama. Logical provides business technology solutions for professional organizations in Mississippi, Alabama and Florida. He consults with professional clients on information security and compliance. Prior to this position, Constantine was the Administrator/Chief Operating Officer for Lyons, Pipes & Cook, which became part of Phelps Dunbar LLP in July 2010. He has a background in banking, financial reporting and internal auditing. Constantine served a term on the ALA Board of Directors and as President of the Association. He remains an active member of the Mobile, Alabama Chapter of ALA.

**Kathryn Scurby** is the Principal of KNS Consulting, LLC. She works with professional service firms to achieve their goals in the areas of business continuity, disaster preparedness, risk management and compliance. Scurby trains management professionals and all levels of staff at private service firms and facilitates table-top exercises in these focus areas. Additionally, she served on ALA's Board of Directors (2004–2008), was a Trustee for the Foundation of the Association of Legal Administrators (2010–2013), and currently serves on ALA's International Relations Committee.

**Location / Room:** Grapevine B

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**OM12: In the Cyber Trenches with a Legal Management Professional and a Cyber Forensics Expert: Cybersecurity Track (Session 2)**

**Monday, April 15 2:00 PM - 3:15 PM**

Whether you are a large multinational law firm or a small boutique, cybercrime is real. It's nondiscriminating and affects firms of all sizes. Taking proactive steps can help mitigate the damage and establish a reasonable and defensible position. Attendees will walk through the steps taken after speaking to new and current vendors regarding their cybersecurity, and then discuss the challenges and opportunities involved in convincing shareholders to invest in being proactive. Additionally, attendees will learn ways to evaluate an existing cyber incident response plan.

**Objectives:**
- Discuss the approaches, technical jargon and what you need to know to be proactive and secure.
- Discover the steps that had been taken to identify the right partner vs. lowest cost provider.
- Recognize the good, the bad and the ugly from the assessment results and the vendors you thought were protecting you.
- Assemble and quarterback a team that is responding to a data breach.
- Prepare better for the next incident before it's too late.

**Other Information:**
- 75 Minutes
- Audience: Advanced
- CLM Application Eligible: No
- CLM App Management Category -FS: Operations Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Management Advisory Services

**Speaker Info:**

**Pamela Blank Woodruff** is the Firm Administrator at Sequor Law, PA. Her experience in finance and administration ranges from working as a Private Banking Lending Officer and as the Director of a private school serving children 18 months of age through fifth grade. These positions have developed a diverse skill set that she uses daily while analyzing financials, employing IT programs effectively and handling HR situations. Additionally, she’s a member of ALA and the South Florida Chapter.

**Rob Kleeger** is the Founder and Managing Director of Digital4nx Group, Ltd., a boutique firm that offers regional digital forensics services for plaintiffs and defendants in various civil and criminal legal matters. Digital4nx Group provides digital
forensic investigations, electronic-discovery consulting and advisory service, incident response to data breaches, and cybersecurity services, such as ethical hacking.

Location / Room: Texas 4-6

**CM13: Evoke the Secret Sauce to Help New Lawyers Get Off to a Strong Start**

**Monday, April 15 2:00 PM - 3:30 PM**

Brand-new lawyers arrive to Day One of their legal practice without benefit of understanding what it means to be a private practicing attorney vis-à-vis a business owner. This interactive program will outline how law firm administrators can lead new lawyers to a strong understanding of how to effectively transition from law school to private practice to successful business owner, with concrete action steps they may take in the first years of their legal career. Administrators, executive directors and firm leadership will learn how to introduce, integrate and assimilate new lawyers into law firm life in the areas of executive communications, business development and positive discipline formation.

**Objectives:**

- Recognize Day One marketing awareness skills for new lawyers.
- Define progressive business development discipline formation.
- Develop a marketing mindset.
- Discuss powerful executive communication skills for a brighter legal career.

**Other Information:**

- 90 Minutes
- Audience: Essentials
- CLM Application Eligible: Yes
- CLM App Management Category: Organizational Development
- CLM Recertification Eligible: Yes
- CPE Field of Study: Marketing

**Speaker Info:**

**Kimberly Rice** is the President/Chief Strategist of KLA Marketing Associates, where she and her team provide strategic business development advisory services to legal services professionals seeking a more fulfilling and prosperous enterprise. Rice is the author of *Rainmaker Roadmap: A Step-by-Step Guide to Building a Prosperous Business* and a frequent speaker to business and legal groups and associations.

Location / Room: Grapevine 1-3

**CM14: When Did We All Become Difficult People?**

**Monday, April 15 2:00 PM - 3:30 PM**

The concept of "dealing with difficult people" has been trained, coached and dealt with for decades. But are things changing? We want them to change, to stop with the drama and, frankly, to go away from the office, but we're using labels and poor leadership to make it happen. When Did We All Become Difficult People?™ is a session that uncovers the damage done by personality assessments. This session digs deep into the labels we assign and why and how to see beyond the surface, finally helping administrators align expectations with the needs of both employees and attorneys. Interactive, engaging and inclusive of an in-session quiz for each participant, Monica Wofford's session brings humor to the delicate issues of authenticity, name calling, difficult people and leading.

**Objectives:**

- Identify content that sheds new light and new application on the same old concept of typical assessments and change how you use assessment data.
- Apply three immediate, simple action items that will eliminate the damage done through the flagrant use of inaccurate labels, such as "difficult boss," in your office.
- Practice a deep, interactive dive into the use of emotional intelligence with activities that solidify your beliefs that "difficult" and "different" are not synonyms, allowing for learning to lead differently, meeting the real needs of those on your team.

**Other Information:**

- 90 Minutes
- Audience: Intermediate
- CLM Application Eligible: Yes
- CLM App Management Category: Communication Skills
- CLM Recertification Eligible: Yes
LI11: The Successful Meeting: 3 Steps to Maximize the Likelihood of Attendees Being Glad They Were Invited

Monday, April 15  2:00 PM - 3:30 PM

Motivational speaker Zig Ziglar described success “as occurring when opportunity meets preparation.” A meeting is an opportunity and its success depends on your preparation. It’s important to understand how to reap the benefits of an effective meeting and minimize the negative impact of ineffective meetings. They affect each stage of the office team’s development. They succeed by becoming practical tools for sharing key data, brainstorming, problem-solving and building relationships. They are unproductive when team members feel their time was wasted; the stated agenda was not efficiently followed, they were not included or important members were absent. This session will give you practical steps to strengthen the three foundational elements of a successful meeting.

Objectives:

- Differentiate between the roles of objective, agenda and process in a successful meeting.
- Apply objective criteria to decide if/when an outside facilitator is desired.
- Discuss the pros and cons of at least two different meeting processes.
- Identify at least three types of meeting distractors.

Other Information:

- 90 Minutes
- Audience: Intermediate
- CLM Application Eligible: Yes
- CLM App Management Category: Communication Skills
- CLM App Management Category - FS: Legal Industry/Business Management
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- SHRM: Communication
- SHRM Learning Format: Instructor-Led Activity
- CPE Field of Study: Communications

Speaker Info:

Izzy Gesell is an “organizational alchemist” who helps people navigate their internal logjams to emerge confident, spontaneous and effective. Through keynotes, breakouts, coaching and facilitated sessions, Gesell offers imaginative, intuitive and immediately useful insights and programs. Among the first to use improv concepts as tools for personal and organizational learning, he is the author of Playing Along: Group Learning Activities Borrowed from Improv Theater.

Location / Room: Grapevine 4-6
LI13: An Inside Look at What In-House Leaders Want from Law Firms and How to Achieve It

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

In the current market, law firm leaders are struggling to engage an increasingly elusive community of in-house personnel. With power shifting inside the general counsel's office and a variety of individuals, from procurement professionals to chief operating officers, influencing the selection of outside support, it is essential to understand the key factors that are motivating existing clients and future prospects. The principal researcher for almost 30 legal industry benchmarking surveys will present market research that offers a comprehensive look at why client relationships are shifting and the creative ideas firms are implementing to adapt to this new environment.

Objectives:
- Recognize how to more effectively reach out to clients and prospects.
- Prepare to anticipate administrative law department concerns.
- Identify and propose new initiatives that generate additional matters.
- Recall and address long-term goals of in-house counsel.
- Create and adapt firm initiatives to the concerns of corporate legal teams.

Other Information:
- 60 Minutes
- Audience: Intermediate
- CLM Application Eligible: No
- CLM App Management Category -FS: Legal Industry/Business Management
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- CLE: Participatory Credit
- CPE Field of Study: Business Management & Organization

Speaker Info:

Ari Kaplan, a leading legal industry analyst, is an inaugural Fastcase 50 Honoree, a Fellow of the College of Law Practice Management and a Finalist for ILTA’s Thought Leader of the Year award. He is the author of Reinventing Professional Services and The Opportunity Maker, as well as the principal researcher for various benchmarking reports. Kaplan is also the Founder of the Lawcountability® software platform, a finalist for ILTA’s Innovative Solution Provider of the Year award. He has been honored to speak at over a dozen ALA chapters and has collaborated with the ALA on creating a legal management professionals’ edition of Lawcountability.

Location / Room: Exhibit Hall Booth 1235

FM13: Profit Patterns: Using Matter Budgeting and Alternative Fees to Increase Profits

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

This program will help law firm administrators enhance their bottom line. Lawyers often make arrangements with clients to get their business with little knowledge of the cost or profitability of the specific engagement. The use of prospective matter budgeting can create a competitive advantage to offer more value to clients. The use of forensic matter budgeting can be used to identify why specific fee arrangements are more profitable than others. The discussion will also review a matrix of implementation issues including cost analysis, labor utilization and process efficiency.

Objectives:
- Identify various alternative billing arrangements.
- Discuss methods of implementation and how to evaluate options.
- Review strategies for effective cost measurement, analysis and matter budgets.
- Recognize profit patterns and possible planning scenarios.

Other Information:
- 75 Minutes
- Audience: Intermediate
- CLM Application Eligible: No
- CLM App Management Category -FS: Financial Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Finance

Speaker Info:

Michael Moore, JD, is the Founder of Moore's Law, LLC, and helps both lawyers and law firms create professional success. Moore specializes in individual marketing, client development and leadership coaching and advises law firms on
strategic planning, growth initiatives and resource optimization. A frequent speaker at ALA events across the country, his current topics have included mentoring, leadership, financial management and strategic planning.

Location / Room: Texas 1-3

HR14: Measure What Matters

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

"What is the value of your learning programs?" You might be thinking, "That's all our LMS measures" or "No one has ever asked for anything else." Peter Drucker, a father of modern management, said, "What gets measured, gets managed." We'd like to add to that statement: "And by planning what gets measured, we’re able to measure what matters." If you position yourself as a strategic business partner to the firm, this interactive and highly engaging session is for you. Don’t rely on speculation — instead, join us to participate in a discussion with your peers and learn more about establishing metrics that matter, allowing the analytics to tell the story. Bring your device and be ready to participate by text, browser or app.

Objectives:

- Examine how to align learning programs to the business.
- Explore the four levels of evaluation.
- Discuss how to establish key performance indicators (KPIs), determine the benchmark and set the cadence for continued measurement.
- Distinguish the importance of socializing learning program goals and measurement plans.
- Discuss ways to engage stakeholders and lateral teams.

Other Information:

- 75 Minutes
- Audience: Advanced
- CLM Application Eligible: No
- CLM App Management Category -FS: Human Resources Management
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- SHRM: Critical Evaluation
- SHRM Learning Format: Instructor-Led Activity
- CLE: Participatory Credit
- CPE Field of Study: Management Advisory Services

Speaker Info:

Eileen Whitaker is a Senior Learning & Change Management Consultant at Traveling Coaches. She partners with law firm stakeholders and learning professionals to develop strategies that maximize user adoption of technology-related business initiatives. She specializes in strategic learning approaches and professional development communications, educating firm stakeholders on the need for data security and driving legal professionals toward behavioral change. Whitaker is a certified Change Management Practitioner and winner of the ILTA Distinguished Peer Award for Innovative Consultant of the Year in 2016 and 2018.

Location / Room: Grapevine A

CM15: From Blind Spots to Breakthroughs

Monday, April 15 4:00 PM - 5:30 PM

Everyone has blind spots. The difference between a breakdown and a breakthrough is your willingness to check them. Without checking our blind spots, we are destined to let our subconscious do the driving, impacting our choices and interactions in ways we never anticipated or intended. By definition, we are incapable of seeing our own blind spots. Not recognizing that we don't know what we don't know can be costly in any organization. This session helps employees identify and overcome behaviors that act as barriers to their optimal performance on both an individual and organization-wide basis.

Objectives:

- Identify bias and ethical blind spots in individuals and at the organizational level.
- Examine and overcome the evolution of potentially harmful human behaviors.
- Prepare a roadmap to keep blind spots in check.

Other Information:

- 90 Minutes
- Audience: Intermediate
- CLM Application Eligible: Yes
Objectives:

- CLM App Management Category: Communication Skills
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- SHRM: Ethical Practice
- SHRM Learning Format: Instructor-Led Activity
- CLE: Legal Ethics
- CPE Field of Study: Behavioral Ethics

Speaker Info:

Rebecca Heiss, PhD's style — alongside her expertise in human behavior and evolutionary psychology — brings her audiences along for an enlightening journey into their own minds. After earning a PhD with research designated as "transformative" by the National Science Foundation, Heiss went on to hold multiple appointments in academia, applying her research to solve practical problems in overcoming what she refers to as "biological ghosts," subconscious behaviors that haunt modern life.

Location / Room: Grapevine 1-3

FM12: Lessons Learned from the Trust Accounting Battlefield

Monday, April 15 4:00 PM - 5:30 PM

Client trust accounting is one of the most crucial functions that you either do yourself or supervise. Unfortunately, it's also probably the most overlooked. Whether you supervise this area, you do the trust accounting yourself or you're just interested in how to keep your firm out of trouble, this is the session for you! You will leave this session with the knowledge of how to review your firm's trust account and trust accounting procedures along with a step-by-step checklist or guide to assist you.

Objectives:

- Review the differences between the general accounting and trust accounting functions.
- Outline the three reconciliations necessary to properly reconcile your trust accounts (hint: the bank reconciliation is only the first step!).
- Identify the most common problems in trust accounts.
- Recognize how to audit the trust accounting process and what to look for, including what to do if you find a problem in your trust account.
- Discover warning signs you might be in violation of state or state bar rules.

Other Information:

- 90 Minutes
- Audience: Intermediate
- CLM Application Eligible: No
- CLM App Management Category -FS: Financial Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Accounting

Speaker Info:

Terri Oppelt, CLM, SPHR, SHRM-SCP, is a Director in Armanino's Law Firm Services group. Oppelt consults in all areas of law firm management and operations, including strategic planning, compensation, accounting operations and billing, administration support strategies, HR and leadership, organizational change, training and retreats. As a Past President of the Greater Los Angeles Chapter of ALA, she is a frequent speaker for ALA and is a new member of the Professional Development Advisory Committee. Oppelt holds a bachelor's degree in management from Pepperdine University.

Dave Roberts is Partner-in-Charge of Armanino's Law Firm Services Group, where he assists law firm clients in successfully dealing with the challenges of today's competitive environment. With more than 30 years of experience working with law firms of all sizes, he understands the nuances of this distinctive marketplace. Roberts and his group have consulted with more than 1,200 law firms in the areas of strategic planning, partner compensation, succession planning, partner withdrawal and retirement issues, profitability analysis and improvement, firm restructuring, dissolutions, and mergers and acquisitions.

Location / Room: Grapevine D

HR15: Legal Administrative Assistant Teaming Models: The Next Level and How to Get There

Monday, April 15 4:00 PM - 5:30 PM

The traditional "legal secretary" role and model have greatly evolved over the years. As we have heard at previous conferences, firms have created teaming structures with an intent to improve efficiencies and increase staffing ratios. What's next for legal support of the future? Join HR leaders from various firms throughout the country in a panel discussion to learn more about the concepts implemented by ALA peers – where we have been, where we are now, and what to expect in the future.

Objectives:
• Examine the different types of teaming models and how to adopt a plan that works best for your firm.
• Identify the benefits of team structures and how to sell a new model to your firm's leadership.
• Discover how other firms faced with a retiring workforce have located the talent necessary to build legal support teams.
• Discuss legal support trends now and in the future.

Other Information:

• 90 Minutes
• Audience: Intermediate
• CLM Application Eligible: No
• CLM Recertification Eligible: Yes
• HRCI: General Credit
• SHRM: Communication
• SHRM Learning Format: Instructor-Led Activity
• CLE: Participatory Credit
• CPE Field of Study: Personnel/HR

Speaker Info:

Julie Logan, SPHR, SHRM-SCP, is the Director of Human Resources at Newmeyer & Dillion, LLP, a firm based in Newport Beach, California, and named one of the Best Places to Work in Orange County for the last seven years. With more than 30 years’ experience in the legal industry, Logan is a strategic and influential human resource professional with proven achievements in leading organizational initiatives, innovation, process improvement, and comprehensive human resource programs. She has been a member of ALA since 1998 and has served in numerous leadership positions on the local, regional and international levels, most recently completing her three-year term as At-Large Director on the ALA Board of Directors. Logan acquired a bachelor's degree in Psychology and holds two human resource professional certifications.

Nichole Cornwell is currently Senior Office Administrator in the St. Louis office of Husch Blackwell, LLP and has management responsibility over several additional offices. Previously held positions include Paralegal and Paralegal Manager at Cordell & Cordell, P.C. Cornwell has 14 years of experience in the legal industry with proven achievements in leading firmwide initiatives, including being an instrumental member of Husch Blackwell’s task force assigned to successfully implement a new administrative support structure. She received her Bachelor of Arts in Legal Studies from Maryville University and has served in multiple leadership positions in the local ALA Gateway Chapter, most recently as President of the Board.

DeAnna Ouderkirk, CLM, MBA, is the Office Administrator of the San Francisco office of Sheppard Mullin, where she is responsible for the day-to-day operations and the ongoing leadership and development of staff. Working collaboratively with the co-managing shareholders and her team, she plans, develops and implements best practices to improve the effectiveness of their processes. Ouderkirk also serves as Chair of ALA's Certification Committee and is an active member of the Golden Gate Chapter of ALA, the Bay Area Human Resource Executives and the Society of Human Resource Management.

Julie Paul is the Director of Human Resources for Morris, Nichols, Arsht & Tunnell LLP in Wilmington, DE, where she oversees the human resources policies and practices for the firm. She began her legal career as an attorney for an AmLaw 100 firm. Specializing in Labor & Employment practice, she later transitioned to the HR function, working for large Philadelphia employers, including a regional law firm where she honed her expertise in delivering HR leadership to legal professionals.

Location / Room: Grapvine C

OM13: The Legal Requirements Following a Data Breach: Cybersecurity Track (Session 3)

Monday, April 15  4:00 PM - 5:30 PM

Through a mock tabletop exercise, attendees will walk through a scenario where there was a data breach at their firm. They will be part of the post-breach response team that will include their firm’s general counsel and chief information officer. The committee is going to have to review the firm’s policy for data breach response and act quickly. The goal is for attendees to walk away with a better understanding of what it's going to be like when this happens for real. This session also includes an evaluation of an existing data breach response plan. This plan will intentionally have some flaws to illustrate how poor planning creates chaos. Attendees should leave better equipped to help their firms draft quality data breach response plans.

Objectives:

• Describe the anatomy of a data breach.
• Express the time-sensitive nature of data breach response.
• Recognize the chaos that exists in a post-breach environment.
• Arrange and quarterback a team that is responding to a data breach.
• Evaluate your firm's data breach response plans and improve it.

Other Information:

• 90 Minutes
• Audience: Advanced
James Gast is a 20-year legal tech veteran who presents at legal community events hosted by the Cincinnati Paralegal Association, the University of Cincinnati Paralegal Studies program and the Cincinnati Bar Association. He has held certifications for Time Matters, Billing Matters, Timeslips, Amicus Attorney, PCLaw and Clio.

David Myers, JD, is an Attorney and legal technology expert. He is a frequent speaker and writer for many organizations across the country. He typically speaks on legal technology, the legal ethics of technology and cloud computing, productivity techniques for lawyers, and more.

Healthy Start: Walk

Tuesday, April 16 6:00 AM - 6:45 AM

Meet ALA colleagues who will lead the group on a refreshing walk outdoors to start the day right.

Location / Room: Hotel Main Lobby

Healthy Start: UJAM

Tuesday, April 16 6:00 AM - 6:45 AM

This morning we'll have a session of UJAM for you to start your day!

What is UJAM? It is a high energy dance fitness class that takes dances from all over the world and mixes it with an urban, hip hop flavor. When you walk into a U-Jam class, the feeling is always happy and energetic.

Location / Room: Conv Center Circle Drive

Friends of Bill

Tuesday, April 16 6:45 AM - 7:15 AM

Location / Room: San Antonio 1

Breakfast

Tuesday, April 16 7:30 AM - 8:00 AM

Location / Room: Texas Ballroom

Silent Auction

Tuesday, April 16 7:30 AM - 6:00 PM

Location / Room: Center Prefunction

Registration

Tuesday, April 16 7:30 AM - 6:00 PM

Location / Room: Center Prefunction
CM20: General Session: Harnessing Headwinds

Tuesday, April 16 8:00 AM - 9:15 AM

Leaders across every industry and experience level share one thing in common: to be successful they need to effectively navigate failure, organizational change, moments of vulnerability, and the unknown. Using the idea of headwinds as a metaphor, this elite fighter pilot will share inspiring personal stories — and practical tools — to ignite your ability to successfully harness the headwinds in your own life.

Objectives:

• Overcome personal and professional failures.
• Effectively navigate organizational and cultural change.
• Practice vulnerability and transparency to build trust.
• Endure the discomfort of the unknown.

Other Information:

• 60 Minutes
• Audience: Essentials
• CLM Application Eligible: Yes
• CLM App Management Category: Organizational Development
• CLM Recertification Eligible: Yes
• HRCI: General Credit
• SHRM: Leadership & Navigation
• SHRM Learning Format: Instructor-Led Activity
• CLE: Participatory Credit
• CPE Field of Study: Personal Development

Speaker Info:

A 21-year veteran of the United States Air Force, retired Col. Nicole Malachowski is a leader, a combat veteran, the first woman pilot on the Thunderbirds Air Demonstration Squadron, an instructor, a White House Fellow, and an inductee into the Women in Aviation International Pioneer Hall of Fame.

Malachowski earned a Master of Arts, with honors, in National Security Policy from American Military University and a second Master of Arts, with highest distinction, in National Security and Strategic Studies from the U.S. Naval War College. While there, she earned the Admiral Stephen B. Luce Award as the class honor graduate, the first Air Force officer in the history of the Naval War College to do so. She has been recognized with several honors for her consistent contributions to community service.

Malachowski was born in Santa Maria, California, and graduated high school in Las Vegas, Nevada. She and her husband, Paul, have twin children, son Garrick and daughter Norah.

Location / Room: Texas Ballroom

Exhibit Hall Hours

Tuesday, April 16 9:00 AM - 11:30 AM

Location / Room: Longhorn DEF

Exhibit Hall Coffee Break

Tuesday, April 16 9:15 AM - 10:15 AM

Location / Room: Longhorn DEF

Recharge Your Health: Quick Meals Made Easy

Tuesday, April 16 9:30 AM - 9:45 AM

Join Lance Breger in the Recharge Your Health Lounge in the Exhibit Hall and experience the Wellness Lab, NEW this year!

Location / Room: Exhibit Hall Booth 1235

BB20: Step into Thought Leadership
Tuesday, April 16 9:30 AM - 9:45 AM

Would you like to move your career to the next level? Would you like to be regarded as a thought leader? If so, it's time to write! By writing white papers, articles, blogs and books, you can position yourself as the leader. In this session, you'll learn about the benefits of thought leadership — as well as some practical steps to get there.

Speaker Info:

Cathy Fyock, CSP, SPHR, is the Business Book Strategist and works with professionals and thought leaders who want to write as a business growth strategy. She is the author of eight books, including *On Your Mark: From First Word to First Draft in Six Weeks* and her newest, *Blog2Book: Repurposing Content to Discover the Book You've Already Written*. Before her new business launched in 2014, Fyock was an employment strategist with several businesses and HR consulting firms and led her own company, Innovative Management Concepts. She has now helped more than 100 professionals become published authors.

Location / Room: Ft. Worth 5-7

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**BP20: Payments and Law Firms: The Ever-Growing Need to Improve!**

Tuesday, April 16 9:30 AM - 10:00 AM

By [Global Exchange Payment Solutions](#)

This session focuses on enhancing the global accounts payable and billing processes for professional services firms. From direct invoice processing with seamless billing integration for international payments - to eliminating 100% of the manual check and reconciliation process for USPTO Payments, maximizing value out of your accounts payable program.

Speaker:

Anthony Loiacono

Location / Room: Solutions Hub A

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**BP21: The Roadmap to the Modern Law Firm**

Tuesday, April 16 9:30 AM - 10:00 AM

By [FlexManage](#)

This presentation covers the most impactful technologies and strategies available for law firms to improve productivity, enhance client service, make more informed decisions and lower the cost of IT infrastructure. Learn where you are on the roadmap and where to go next in this interactive session.

Speaker:

Lee Hovermale, CEO

Location / Room: Solutions Hub B

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**BP22: Building a Modern and Efficient Records Retention Schedule for Both Electronic and Physical Content**

Tuesday, April 16 9:30 AM - 10:00 AM

By [iManage](#)

Legacy retention schedules designed in the days when paper made up the majority of an organization's records do not work well in today's world where 95% of content is created or received in electronic format. Organizations must rethink their approach and the technologies they use to allow them to manage this electronic content whilst continuing to handle legacy paper retention.

Speaker:

Ian Raine, Vice President, Product Management

Location / Room: Solutions Hub C

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**BB21: Now More Than Ever: Law Firm Harassment Prevention in the #MeToo Era**
Tuesday, April 16  9:45 AM - 10:00 AM

It's 2019 and the #MeToo movement has not lost steam. Law firms remain at risk for inappropriate conduct and, therefore, claims, given the very real power dynamics and hierarchical structure that exist in many of our offices. This BOLD Bite will examine law firm risk factors and provide a realistic approach and practical, business-focused steps that can be taken to provide an environment that is comfortable and safe for our employees.

Speaker Info:

Michael S. Cohen, JD, is a Partner at Duane Morris LLP in Philadelphia in the firm's Employment Services Practice Group, where he concentrates his practice in the areas of employment law training and counseling. A highly rated ALA speaker, he has trained and counseled employees throughout the country on employment subjects, including harassment prevention, diversity, discipline, hiring, firing, recruiting, performance evaluations and compliance.

Location / Room: Ft. Worth 5-7

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BB22: Embracing Change

Tuesday, April 16  10:00 AM - 10:15 AM

All of us have seen a lot of change. Some of us have initiated change, and some of us have probably resisted it. What I know for sure is we can expect more, and we need to know how to embrace it. This BOLD Bite will teach you a six-step model for embracing and making the most of the constant change in our lives, both professionally and personally.

Speaker Info:

Natalie Loeb, MS, is the Founder of Loeb Leadership Development Group, a certified woman-owned business with more than 30 coaches and consultants who are dedicated to developing leaders. In addition to being a successful business leader, Loeb is a leadership coach and facilitator with more than 20 years of experience working with leaders at all levels. She coaches partners, associates, new and seasoned managers, and chief executive officers. Loeb was a member of the human resources team at Skadden, Arps, Slate, Meagher & Flom LLP.

Location / Room: Ft. Worth 5-7

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Recharge Your Health: Two Minutes to Less Stress

Tuesday, April 16  10:00 AM - 10:15 AM

Join Lance Breger in the Recharge Your Health Lounge in the Exhibit Hall and experience the Wellness Lab, NEW this year!

Location / Room: Exhibit Hall Booth 1235

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FM14: Developing Strategic Incentives to Improve Competitiveness in Today's Market

Tuesday, April 16  10:15 AM - 11:30 AM

Law firm financial structures traditionally have supported lawyer autonomy and lawyer "production," but not much else. Firms are now serving a more multifaceted mission. They are having to encourage a whole new set of individual and collective behaviors to compete, and are making some big pivots. In support of rapid, "needle-moving" change, firm executive directors, COOs and compensation committees are going to great lengths to reward "inputs" and efforts rather than relying solely on quantitative results.

Objectives:

• Identify emerging strategic priorities supported through the compensation system.
• Examine how firms are incentivizing "good works" and efforts that are correlated with yet-to-be-experienced contributions rather than contributions themselves.
• Calculate the pros and cons of using special bonus pools outside of the compensation system to reward partner contributions aligned with their firm's strategy.
• Recognize how the compensation system can activate collaborative efforts in originating new relationships at the front end rather than rewarding collaborative delivery of work at the backend.

Other Information:

• 75 Minutes
• Audience: Advanced
• CLM Application Eligible: No
• CLM App Management Category -FS: Financial Management
• CLM Recertification Eligible: Yes
Mike White, JD, is a Principal with global law firm consultancy, Edge International. With more than 30 years’ experience as a lawyer, manager of multiple business services companies, and management consultant, he is an expert in the field of law firm growth. White spends most of his time in the following areas: client experience innovation and differentiation, strategic planning for growth, and compensation structuring and management. He was a practicing attorney for seven years, founded two enterprise software companies, and he owned and managed ClientQuest Consulting, LLC. He holds a bachelor’s in history from Duke University and a JD from Emory University School of Law.

Location / Room: Ft. Worth 5-7

CM21: Motivating People from the Inside Out

Tuesday, April 16 10:30 AM - 11:30 AM

The cost of employee disengagement (71 percent according to Gallup) to many businesses is staggering — resulting in high turnover, low productivity and customer base erosion (a result of poor work quality and customer service). Get all employees to become emotionally and socially intelligent, then collectively solve business problems that have ROI and non-ROI ramifications. Understand an innovative systems approach, in which leaders replace control models (four of them) with a responsibility and values-based model (and transfer ownership of this model to their entire employee team), to ensure sustained, high engagement levels. Real culture change involves creating a culture where intrinsic motivation is developed as a priority.

Objectives:

• Review systems needed for development of responsibility and intrinsic motivation that assist all in becoming influential and self-directed.
• Solve why and how to dismantle control models.
• Distinguish how and specifically what to do, regarding mentoring.
• Identify and nurture the four intrinsic motivators.
• Apply what’s learned immediately in mentoring and supporting the intrinsic motivation of others and when managing intrinsic or internal motivation in self.

Watch a short promo video of this session.

Other Information:

• 60 Minutes
• Audience: Intermediate
• CLM Application Eligible: Yes
• CLM App Management Category: Organizational Development
• CLM Recertification Eligible: Yes
• HRCI: General Credit
• SHRM: Communication
• SHRM Learning Format: Instructor-Led Activity
• CLE: Participatory Credit
• CPE Field of Study: Personnel/HR

Speaker Info:

Judy Ryan has been the owner of LifeWork Systems, an award-winning training and consulting company specializing in leadership development and culture change, since 2002. She is the recipient of the Women of Distinction award and the Vanguard Award for Innovation in Service Delivery from the St. Louis Mental Health Board. Ryan is an author, columnist, consultant, trainer, coach and keynote presenter, with guest appearances on TV and radio.

Location / Room: Grapevine B

FM20: The Basics of Life in the Law Firm Accounting Lane

Tuesday, April 16 10:30 AM - 11:30 AM

Are you new to law firm accounting, or do you spend your time in another area of law firm management and want to know more about the finances of your firm? Let’s get ready to kick assets and take names! This presentation will cover the unique components of law firm accounting, how to easily understand financial statements, the function and importance of the trust account, the importance of not only having a budget but understanding how it compares to actual dollars spent, and the significance of alternative (appropriate) fee
arrangements. The session will also demonstrate the relevance of legal process improvements and legal project management in law firms.

Objectives:

- Define the core concepts associated with law firm accounting conventions and terminology.
- Examine and articulate financial statement information.
- Discuss rules related to client trust accounts.
- Discuss the importance of budgeting.
- Discuss the use of alternative (appropriate) fee arrangements and how legal process improvement and project management are becoming more crucial.

Other Information:

- 60 Minutes
- Audience: Essentials
- CLM Application Eligible: No
- CLM App Management Category -FS: Financial Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Accounting

Speaker Info:

Lisa Waligorski, CLM, is the Executive Director at Newmeyer & Dillion LLP. She started her career in a legal assistant/paralegal role. The past 20 years have been spent as a law firm Controller/Finance Director and Executive Director, providing her with a strong background in law firm accounting and contract negotiations. Waligorski is an ALA e-Learning instructor and recently taught at the ALA Law Firm Management Essentials conference. She has also presented various other law firm management topics.

Location / Room: Grapevine A

FM21: Outsourcing Marketplace: Trends, Challenges and Opportunities

Tuesday, April 16 10:30 AM - 11:30 AM

The legal market for services has disintermediated into a legal supply chain. From traditional services areas to litigation support services to LPOs and more, outsourcing can be a strategy that reduces costs and infuses your firm with efficiency and expertise, while improving the recovery of those costs. What is the process that will help your firm decide the right path? We'll have a high-level discussion of outsourcing marketplace trends and challenges — and what opportunities peer firms are optimizing.

Objectives:

- Discuss key questions to consider that will help your firm decide to insource or outsource services.
- Review benchmark data on outsourcing practices of peer firms.
- Discover how to take traditional areas of outsourcing (reprographics, mail, etc.) and make them more cost-effective and efficient with added benefits to the firm.
- Recognize how new areas — document processing, records, litigation support and administrative resources — are being reviewed and outsourced.

Other Information:

- 60 Minutes
- Audience: Essentials
- CLM Application Eligible: No
- CLM App Management Category -FS: Financial Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Business Management & Organization

Speaker Info:

Rob Mattern is President and Founder of Mattern & Associates LLC. Mattern & Associates assists law firms in developing an unbiased strategic direction for their business processes while improving both the cost-effectiveness and the recovery of expenses for these services. Mattern is a frequent speaker at key industry events including the ALA Annual Conference, the COO & CFO Forum and the PwC Law Firm Services Global Forum.

Location / Room: Texas 1-3

FM22: Sitting for the May CLM Exam?
Tuesday, April 16 10:30 AM - 11:30 AM

Thinking about taking the Spring exam? Falling to the pressure of procrastination and putting off the exam? Then you cannot afford to miss this session! Regardless of the stage in your career, certification adds a valuable dimension to your professional development. If you are thinking about beginning the process to apply to take the CLM exam or just want to get a better idea of what to expect, join the Greater Chicago Chapter CLM Study Group for their Financial Review Session in preparation for the May 13 exam. This will provide a broad overview of financial terms and processes that every legal manager should know.

Objectives:
• Gain a general understanding of the overall financial management of a law firm.
• Understand the content and materials that will need to be studied to successfully pass the CLM exam as it relates to the finance section.
• Obtain a general understanding of general accounting terms and procedures used in law firms.
• Understand the importance of financial information and analysis; how it is used and why.

Other Information:
• 60 Minutes
• Audience: Essentials
• CLM Application Eligible: No
• CLM Recertification Eligible: Yes

Speaker Info:

Michael Hill, CPA, is the Controller with Gould & Ratner LLP, a mid-sized, full service law firm located in Chicago. He has more than 7 years of financial experience. Michael currently serves as the CLM Finance instructor for the Greater Chicago Chapter's CLM Study Group, which offers ALA members throughout the country a comprehensive review of all areas covered on the CLM exam. The study group has helped over 40 members achieve their CLM certification.

Location / Room: Grapevine 4-6

HR20: Mind Full? Be More Mindful!

Tuesday, April 16 10:30 AM - 11:30 AM

The pressures of legal management are accentuated in this 24/7 world. In this session, we will practice and play with mindfulness exercises you can take home for yourself and your team.

Objectives:
• Recognize the benefits of mindfulness.
• Practice techniques to improve mindfulness.
• Calculate your stress level and how to reduce it.

Other Information:
• 60 Minutes
• Audience: Intermediate
• CLM Application Eligible: Yes
• CLM App Management Category: Self-Management Skills
• CLM App Management Category -FS: Human Resources Management
• CLM Recertification Eligible: Yes
• SHRM: Communication
• SHRM Learning Format: Instructor-Led Activity
• CPE Field of Study: Personal Development

Speaker Info:

Judy Hissong, CLM, PCC, is the President of Nesso Strategies and Founder of the Legal Leadership Institute. Nesso is the Italian word for connection, and connecting strategies is Hissong's passion. Her financial background pairs with her athletic mindset and her executive coach training as she partners with law firm professionals for strategic planning, leadership development, executive coaching, team building, and training in conflict and communication skills. She has more than a decade of law firm leadership experience, giving her an insider's understanding of the complexities of the business of law.

Location / Room: Grapevine C

LI20: Turning Retreats into Revenue

Tuesday, April 16 10:30 AM - 11:30 AM
When designing a firm or group retreat, it’s important to develop programming that will deliver a significant return on the time, and money, invested in these events. To accomplish this goal, get lawyers laser-focused on generating more revenue. A well-crafted retreat can serve as a launching pad that motivates lawyers to engage in high-value business development activities.

Objectives:

- Identify the major goals of a revenue-focused retreat.
- Define key elements that drive revenue-generating behavior. Discuss programming ideas designed to drive revenue-producing activity.
- Illustrate approaches for how lawyers can maximize their business development time at the retreat.
- Discuss retreat follow-up techniques.

Other Information:

- 60 Minutes
- Audience: Advanced
- CLM Application Eligible: No
- CLM App Management Category -FS: Legal Industry/Business Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Business Management & Organization

Speaker Info:

**David H. Freeman, JD**, a former practicing lawyer, is the award-winning Chief Executive Officer of the David Freeman Consulting Group and Founder of Law Firm CultureShift®. He is an author, speaker, consultant and coach who has shown thousands of lawyers and leaders how to become better rainmakers. For three consecutive years, Freeman was voted the No. 1 Law Firm Business Development Consultant and Coach in nationwide *National Law Journal* surveys, and for 24 years, he has worked with hundreds of law firms worldwide. Freeman is a highly rated speaker, trainer and consultant, and he has written four books (including two best-sellers) on law firm leadership and business development.

Location / Room: Grapevine D

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**OM20: Information Governance Is Vital to Client Strategy: 5 Steps to Excellence**

**Tuesday, April 16 10:30 AM - 11:30 AM**

Proper information governance (IG) is an essential component of client service. A poorly managed situation exposes your clients to risk and, therefore, your firm to reputational harm. Information governance is one of the leading concerns for chief learning officers, and why clients investigate firms’ information governance policies during the RFP phase and contract to those standards in outside counsel guidelines. From the initial steps of implementing an enterprise workflow scanning solution to formulating key off-site storage contract terms and conditions that help reduce withdrawal fees and cost-effectively destroy records to applying a records retention policy, this is how IG excellence becomes part of your client strategy.

Objectives:

- Distinguish the five fundamental components of an information governance strategy.
- Identify how to implement an integrated "electronic-first" workflow.
- Demonstrate how to create digital on-ramps for document conversion.
- Examine terms and conditions in records storage contracts for optimal results.
- Define a cost-effective destruction policy and apply a records retention policy.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM Application Eligible: No
- CLM App Management Category -FS: Operations Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Business Management & Organization

Speaker Info:

**Stephen Cole** is the Director of Client Technology & Strategy at Mattern & Associates. Cole has more than 20 years of expertise in consulting for large law firms, including areas regarding litigation support, records and information management, cost recovery and end-to-end e-discovery services. He’s gained his experience both on the service provider and law firm sides, including as the Vice President over the legal business unit at Pitney Bowes Management Services and as a Regional Vice President of Ipro Tech.

Location / Room: Grapevine 1-3

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**OM21: Cloud and Security: Are You Ready? Because Your Clients Are!**
Tuesday, April 16 10:30 AM - 11:30 AM

With more firms leveraging the cloud, many expect the businesses they work with to do the same. In the legal industry, we see a lot of firms looking to leverage the cloud due to the demand of their clients and business partners. This is something that will continue to occur — and in an increasing manner — in the year ahead.

Objectives:

- Discuss best practices for selecting a cloud provider.
- Identify a successful path to migration.
- Prepare for inevitable surprises that will occur.

Other Information:

- 60 Minutes
- Audience: Essentials
- CLM Application Eligible: No
- CLM App Management Category -FS: Operations Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Administrative Practice

Speaker Info:

Morris Tabush has more than 20 years of experience managing IT for businesses so they can focus on what they do best. In 2001, he founded Tabush Group, which is a leading provider of cloud desktops and managed IT for professional firms. Tabush and his team focus on delivering simple, scalable and secure solutions to clients.

Location / Room: Texas 4-6

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Association Lunch

Tuesday, April 16 11:30 AM - 1:15 PM

Sponsored in part by ABA Retirement Funds.

Join ALA leadership as they pass the gavel, get an update from ALA Executive Director, Oliver Yandle, JD, CAE, regarding ALA and its accomplishments, and host a town hall.

Location / Room: Texas Ballroom

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Exhibit Hall Hours

Tuesday, April 16 1:00 PM - 6:30 PM

Location / Room: Longhorn DEF

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Dessert Break with ALA Aligned: Continue the Conversation with the Board of Directors

Tuesday, April 16 1:15 PM - 2:15 PM

Have questions? Want to share your ideas? As you enjoy coffee and dessert, we hope you will join members of the Board of Directors in the Exhibit Hall Engagement Area to continue the conversation from the Association Luncheon’s “Ask Me Anything” session. Everyone is welcome – ALA members, nonmembers, valued business partners, speakers. Your feedback is key as we keep ALA aligned with your needs. We are eager to hear from you!

Location / Room: Longhorn DEF

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Recharge Your Health: Power Meditation

Tuesday, April 16 1:30 PM - 1:45 PM

Join Lance Breger in the Recharge Your Health Lounge in the Exhibit Hall and experience the Wellness Lab, NEW this year!

Location / Room: Exhibit Hall Booth 1235

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Recharge Your Health: Roll Away Muscle Tension
Tuesday, April 16 1:45 PM - 2:00 PM
Join Lance Breger in the Recharge Your Health Lounge in the Exhibit Hall and experience the Wellness Lab, NEW this year!

Location / Room: Exhibit Hall Booth 1235

CM23: Creating a Culture of Excellence

Tuesday, April 16 2:15 PM - 3:15 PM
In a healthy culture, leaders provide vision and strength to further the dynamics of win-win, authentic collaboration in which power-over and power-under are replaced by power-within. This program is geared toward executives who seek to create a healthy workplace culture to empower people to be exceptional and develop internal leadership. Knowing how to offer employees a compelling and uniquely supportive culture is key to attracting and keeping the best, building upon their strengths and expanding their human potential. Learn a seven-step process to create a healthy workplace culture, including what and why emotional and social intelligence and healthy culture are needed for success.

Objectives:

- Distinguish how to assess your workplace culture.
- Recognize positive outcomes that would warrant changing the culture.
- Assemble change capacity and gain initial commitment from your leadership team with a plan for doing the same with employees, so each comes to embrace a responsibility-based workplace model.
- Apply a scalable seven-step process to transform your workplace culture.
- Identify at least one performance target using an outcomes-based framework to determine a clear ROI.

Watch a short promo video of this session.

Other Information:

- 60 Minutes
- Audience: Advanced
- CLM Application Eligible: Yes
- CLM App Management Category: Organizational Development
- CLM Recertification Eligible: Yes
- HRCI: Strategic Business Management Credit
- SHRM: Leadership & Navigation
- SHRM: Learning Format: Instructor-Led Activity
- CLE: Participatory Credit
- CPE Field of Study: Business Management & Organization

Speaker Info:

Judy Ryan has been the owner of LifeWork Systems, an award-winning training and consulting company specializing in leadership development and culture change, since 2002. She is the recipient of the Women of Distinction award and the Vanguard Award for Innovation in Service Delivery from the St. Louis Mental Health Board. Ryan is an author, columnist, consultant, trainer, coach and keynote presenter, with guest appearances on TV and radio.

Location / Room: Grapevine B

LI21: Every Choice Has a Consequence

Tuesday, April 16 2:15 PM - 3:30 PM
Each choice we make and each step we take provides the foundation for our future. While your employees may be aware of this on some level, do they truly realize the power behind the choices they make on a daily basis? More importantly, what's the risk to your company if they don't? Presenter Chuck Gallagher reveals the consequences of the unethical decisions he made in his own attempt to build the great American dream for himself and his family. His ethics presentation is filled with messages of success and failure, illusions and reality, and choices and consequences.

Objectives:

- Discuss how easy it is for ethical people to make unethical choices — and what to do about it.
- Recognize the impact of life's choices and how that affects your performance, both personally and professionally.
- Identify real-world practical examples of how to use ethics and integrity to create success in business and life.

Other Information:

- 75 Minutes
- Audience: Essentials
OM22: Travel Trends: Future-Proofing Your Policies

Tuesday, April 16 2:15 PM - 3:30 PM

Is your travel policy caught up with present times? It's time to review your firm's travel policy to make sure you are covered.

Objectives:

- Discuss factors to consider when reviewing your firm's travel policy, including modern technology, bring your own device (BYOD), shared economy services, known traveler programs, etc.
- Demonstrate in a travel policy worksheet and exercise to compare your firm's travel policy with other firms of similar size and structure.

Other Information:

- 75 Minutes
- Audience: Intermediate
- CLM Application Eligible: No
- CLM Recertification Category -FS: Operations Management
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- SHRM: Business Acumen
- SHRM Learning Format: Instructor-Led Activity
- CLE: Participatory Credit
- CPE Field of Study: Business Management & Organization

Speaker Info:

Chuck Gallagher is a business ethics expert, consultant, keynote speaker and author. His business insights are sought after for his strong position on ethics and ethical leadership, and he's been featured on CNN, CBS and NPR. His expertise includes sharing practical, tested and time-proven methods that can enhance personal and professional success.

Location / Room: Grapevine 1-3

Michael Steiner, Executive Vice President of Lawyers Travel, oversees the company's marketing, business development and strategic growth efforts. He is an active member and speaker of the Global Business Travel Association and a frequent speaker and writer on the topics of travel management, carbon-neutral travel and online travel solutions. Steiner is a Board Member of the ACTE Steering Committee and an Advisory Board Member of Executive Travel magazine. He graduated from Rutgers University with a bachelor's degree in economics.

Maureen Brady is a 30-year veteran of the global corporate travel industry and joined Ovation in 2017. As Senior Vice President, Client Solutions Group, Brady is responsible for all account management initiatives, ensuring timely and successful travel service delivery, cost savings solutions, customer satisfaction, client retention and travel technology innovation for their clients. Prior to joining Ovation, she held senior leadership roles at mid- and large-market travel management companies including client and consulting services, operations, technology and sales. She is an active member in GBTA, WINIT and ACTE. She attended Marquette University where she studied Economics.

As Office Administrator for Brownstein Hyatt Farber Schreck, LLP, Karen Godfrey is responsible for all day-to-day operations of the Las Vegas office, including supervision and development of staff, financial management, facility management, event planning and strategy implementation. Additionally, in her role as Firm Travel Manager, she oversees the firm's travel budget, develops and manages all firm travel related policies and mediates issues between firm travelers and travel agencies. Godfrey is also a 20-year member of the Association of Legal Administrators, currently a member of the newly formed Chapter Resource Team.

Kerri Gilmore Mesiah is the Director of Administration for the Houston office of Latham & Watkins. For the past two years, she has served on their Travel team. Her primary responsibility with the travel team is to monitor out of policy travel, create and update travel policy and, most importantly, work with LTS to ensure an excellent travel experience for their more than 2,000 employees. Mesiah enjoys learning about the ever evolving travel business and how those changes best fit the needs of a dynamic law firm.

Tina M. White is a strategic leader with more than 20 years of combined professional experience including travel and operations management, project management, people leadership, firm services management, and shared services development and deployment. White is currently the Firm Services Manager at Shook, Hardy & Bacon L.L.P. As part of
her role, she enjoys tapping into her process improvement experiences from her days in corporate America to find new and unique ways to manage the firm's multi-million dollar travel arrangement operations including an on-site team of Travel Agents. While is a Lean Six Sigma Green Belt and a Certified Process Improvement Analyst with a Bachelor of Science in Business Management from Park University.

Location / Room: Grapevine 4-6

HR22: The Time Is NOW: Revamping Your Firm's Performance Appraisal Process

Tuesday, April 16 2:15 PM - 3:45 PM

Organizations are dramatically revamping the appraisal processes to better adhere to the workforce in 2019. Law firms must follow suit and do away with their outdated processes and procedures. Letting your employees know how they are performing remains one of the most important aspects of any manager's job. Whether the employee is doing a great job or needs significant improvement, it is critical that law firm managers know how to document appropriately the employee's performance and realize the importance of carefully drafting the appraisal. This session will explain why appraisals are important, how to better communicate with your employees, describe the drafting process and identify common mistakes made in the drafting process.

Objectives:

- Evaluate your current appraisal process to determine whether it works effectively for your firm.
- Analyze common mistakes made in the drafting and delivering of performance appraisals.
- Discuss the importance of the appraisal process so that firm management appreciates the critical nature.

Other Information:

- 90 Minutes
- Audience: Advanced
- CLM Application Eligible: No
- CLM App Management Category -FS: Human Resources Management
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- SHRM: Communication
- SHRM Learning Format: Instructor-Led Activity
- CLE: Participatory Credit
- CPE Field of Study: Personnel/HR

Speaker Info:

Michael S. Cohen, JD, is a Partner at Duane Morris LLP in Philadelphia in the firm's Employment Services Practice Group, where he concentrates his practice in the areas of employment law training and counseling. A highly rated ALA speaker, he has trained and counseled employees throughout the country on employment subjects, including harassment prevention, diversity, discipline, hiring, firing, recruiting, performance evaluations and compliance.

Location / Room: Grapevine C


Tuesday, April 16 2:15 PM - 3:45 PM

In this session, you will be given an overview of ALA's efforts to develop the first set of standards for the legal management profession — the Uniform Process Based Management System (UPBMS) — and practical examples of how the standards can be used to map processes and inform management decisions.

Objectives:

- Provide contextual discussion regarding the value of developing and using standards.
- Share information about the ALA's Standards Review Committee and their work to develop and promote the UPBMS.
- Provide reference and background material about the UPBMS code sets.
- Review case studies involving process mapping exercises incorporating the UPBMS and illustrating practical ways law firm leaders can leverage the information to improve management decisions.

Other Information:

- 90 Minutes
- Audience: Essentials
- CLM Application Eligible: No
- CLM App Management Category -FS: Legal Industry/Business Management
- CLM Recertification Eligible: Yes
LI24: Law Firm Evolution: Lessons Learned from Industry Leaders and How to Use Them to Transform Your Firm in an Ever-Evolving Marketplace

Tuesday, April 16 2:15 PM - 3:45 PM

In Armanino's Annual CFO Evolution Benchmark Survey, 150+ senior industry leaders were asked to define their firm's most critical strategic priorities and to quantify the importance of their roles in executing those priorities. 73% of them agreed that if their company fails to transform, it will quite simply not exist in the future. We will walk through "why?" and "how?" law firm leaders too must adapt and innovate, using their positions of influence to prepare their firms for success in the future. We'll also learn why it is mission critical that law firm leaders innovate in order to help transform their firms for the future.

Objectives:
• Evolve in the face of disruptive market changes and challenges.
• Transform your firm into the future.
• Gain insights into the external and internal forces posing the biggest threats to law firms, and the ones which present unexpected opportunities.

Other Information:
• 90 Minutes
• Audience: Intermediate
• CLE: Participatory Credit
• CPE Field of Study: Business Management & Organization

OM24: Legal Technology 101: Must-Haves and More | Brought to you by ALT (the Association of Legal Technologists) (Session 2)

Tuesday, April 16 2:15 PM - 3:45 PM

• CLE: Participatory Credit
• CPE Field of Study: Business Management & Organization

Speaker Info:

Catherine Alman MacDonagh, JD, teaches and provides training and consulting services in process improvement and project management; strategic planning, marketing and business development. A Legal Lean Sigma Black Belt and a certified Six Sigma Green Belt, MacDonagh is the Chief Executive Officer and a Founder of the Legal Lean Sigma Institute (LLSI). A former corporate counsel and law firm executive, she is now an adjunct professor at Suffolk Law School and George Washington University's Master of Law Firm Management Program, as well as the author of Lean Six Sigma for Law Firms.

William Mech, CLM, is an accomplished management executive with a proven record of success in improving operations and controlling costs in legal service organizations. He cultivated leadership strengths and legal operations acumen through progressively responsible roles, including Paralegal, Systems Administrator, Business Manager, Legal Office Administrator and Director of Administration. His specialties include financial management and analysis; operating and capital budget management; facilities management and lease negotiations; personnel allocation and utilization; contract negotiations and supplier management; law firm cultural awareness; management and staff development; re-engineering of positions and processes; and utilization of information systems.

Location / Room: Texas 4-6

Speaker Info:

Ryan Prindiville, MBA, heads the Strategy and Transformation consulting practice, providing management consulting, assessments and roadmaps for clients in all of Armanino's business segments. He has extensive business, technology, cybersecurity and operations leadership experience in Fortune 50, mid-market and entrepreneurial environments, and has led global teams in the Americas, Asia and Europe. He has held line leadership and consulting roles in a range of industries, including retail/consumer goods, entertainment, hospitality, technology, healthcare, biotech and financial services. His multi-functional experience includes strategy, technology, product commercialization, innovation, operations, solution delivery, process improvement and management consulting. Prindiville is a certified Six Sigma/Lean Master Black Belt.

Dave Roberts is Partner-in-Charge of Armanino's Law Firm Services Group, where he assists law firm clients in successfully dealing with the challenges of today's competitive environment. With more than 30 years of experience working with law firms of all sizes, he understands the nuances of this distinctive marketplace. Roberts and his group have consulted with more than 1,200 law firms in the areas of strategic planning, partner compensation, succession planning, partner withdrawal and retirement issues, profitability analysis and improvement, firm restructuring, dissolutions, and mergers and acquisitions.

Location / Room: Texas 1-3
Today's changing legal environment requires a general technology platform to help law firms and departments become more efficient, productive and secure. With smaller budgets being dedicated to IT, what are the 10 "must-have" technologies for every law firm or department? What are some future desired IT solutions? This session addresses the necessary technology foundation that every law firm or department must have.

Objectives:

- Recognize the changing legal environment (efficiencies, productivity, security, etc.).
- Describe the 10 necessary technologies that every law firm should maintain.
- Identify future technologies to add to that existing tech foundation.

Other Information:

- 90 Minutes
- Audience: Essentials
- CLM Application Eligible: Yes
- CLM App Management Category: Information Technology
- CLM App Management Category -FS: Operations Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Business Management & Organization

Speaker Info:

Rick Hellers is Chief Executive Officer of nQueue. He has more than 30 years of experience in legal technology and operations management for various law firms (including two AmLaw 200 firms). Hellers is a former member of the Association of Legal Administrators and a founding member of the International Legal Technology Association. He has more than 20 years of experience managing legal vendors and is a frequent speaker and writer on legal technology and management issues.

Rebecca Sattin is Chief Information Officer of World Software Corporation. She was formerly at Mitchell Silberberg & Knupp LLP for 18 years, where she was Director of Information Technology. She has more than 25 years of experience in the area of law firm technology. In the last several years she has spoken to law firms and bar associations about cybersecurity. She has spoken on various other topics, such as design thinking, collaboration and deployment planning at International Legal Technology Association (ILTA) conferences, LegalTech Shows and other technology forums.

Location / Room: Grapevine D

CM22: Writing as a Thought Leadership Strategy

Tuesday, April 16 2:15 PM - 4:30 PM

Writing is one of the most powerful strategies for establishing thought leadership, increasing visibility and credibility, and growing your business. Yet, many professionals don't believe they have the time or expertise to write. In this interactive and engaging session, book coach Cathy Fyock leads attendees in a series of writing exercises to develop writing muscles that will help grow their businesses and careers. Attendees will walk away with an action plan for writing a series of blogs or articles (that could even lead to a published book!). We'll also cover the fundamentals of effective business writing.

Objectives:

- Recognize the power of writing to grow your business and/or build your career.
- Define the purpose, thesis, target market, and structure for business writing (policies, letters, and emails), as well as for writing blogs and articles (that can be used to build a book).
- Practice your writing muscles so that they are writing quickly and confidently.

Watch a short promo video of this session.

Other Information:

- 120 Minutes
- Audience: Advanced
- CLM Application Eligible: Yes
- CLM App Management Category: Writing Skills
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- SHRM: Communication
- SHRM Learning Format: Instructor-Led Activity
- CPE Field of Study: Communications

Speaker Info:
**Objectives:**

- Analyze tactics and strategies to plan for the presentation.
- Recognize the audience and their information needs.
- Create compelling content for the presentation.
- Identify ways of communicating effectively with the audience.
- Examine ways to monitor presentation effectiveness.

**Other Information:**

- 60 Minutes
- Audience: Intermediate
- CLM Application Eligible: No
- CLM App Management Category -FS: Financial Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Accounting

**Speaker Info:**

**Cathy Fyock, CSP, SPHR** is the Business Book Strategist and works with professionals and thought leaders who want to write as a business growth strategy. She is the author of eight books, including *On Your Mark: From First Word to First Draft in Six Weeks* and her newest, *Blog2Book: Repurposing Content to Discover the Book You’ve Already Written*. Before her new business launched in 2014, Fyock was an employment strategist with several businesses and HR consulting firms and led her own company, Innovative Management Concepts. She has now helped more than 100 professionals become published authors.

**Location / Room:** Ft Worth 5-7

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**FM23: You Know the Numbers: So What?**

**Tuesday, April 16 4:00 PM - 5:00 PM**

Law firm finance professionals can fail to earn the seat at the table they deserve when they think their managing partners or board loves numbers as much as they do. As a result, finance presentations are frequently full of data, but they lack insight. Overwhelming decision-makers with numbers leaves them confused, and when they are confused they will not make decisions. The inability to make decisions is costly to the firm, as well as the career of the law firm professional. Learn how to avoid analysis paralysis and decision aversion by focusing on delivering actionable insights, presenting a clear message and communicating financial concepts using effective visualizations.

**Objectives:**

- Identify ways of communicating effectively with the audience.
- Examine ways to monitor presentation effectiveness.
- Create compelling content for the presentation.
- Recognize the audience and their information needs.
- Analyze tactics and strategies to plan for the presentation.

**Other Information:**

- 60 Minutes
- Audience: Intermediate
- CLM Application Eligible: No
- CLM App Management Category -FS: Financial Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Accounting

**Speaker Info:**

**Trevor Varnes** is the Chief Financial Officer at Perkins Coie. He is a key adviser to firm leadership and works with attorneys and staff to make data-based decisions that enable profitable growth. His primary responsibilities include oversight of the firm's finance and accounting function, including the annual operating budget, the financial components of all firm timekeeper compensation processes, and the firm's financial reporting and analytics infrastructure. He also provides firm management with profitability analyses of practice groups and offices, as well as individual timekeepers, clients and matters.

**Location / Room:** Texas 4-6

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**FM24: Rethinking Profitability in a Changing Marketplace: Profitability, Partner Comp, Pricing Track (Session 1)**

**Tuesday, April 16 4:00 PM - 5:00 PM**

The changing legal market is presenting new challenges and opportunities. For some, profits are rising. For others, profits are declining rapidly. Law firm leaders must move beyond viewing profit as a simple, aggregate annual measure and start to view profit as a referendum on how well the firm is allocating resources and meeting client demands. In this interactive session, we’ll demonstrate how progressive law firms are operationalizing profitability and using it to sharpen their strategic focus and improve client satisfaction.

**Objectives:**

- Examine the traditional measures of law firm profitability and why they are lacking.
- Explore new ways of measuring profitability depending on the desired business objective.
- Recognize the obstacles and best practices faced by other law firms as they adopt new profitability measures.

**Other Information:**

- 60 Minutes
- Audience: Advanced
- CLM Application Eligible: No
- CLM App Management Category -FS: Financial Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
OM23: Pros and Cons of Desktop as a Service

Tuesday, April 16 4:00 PM - 5:00 PM

When it comes to cloud services, first it was software (SaaS). Then it was servers (IaaS). Soon came backups (BaaS), disaster recovery (DRaaS), and email (Office 365 and GSuite). Now the focus has come to desktops. Firms have become fed up with the management, cost and security hassles of the desktop environment. Having that environment in the cloud sounds great, right? It can be amazing, if done right. Join this session to learn how to get all the benefits of Desktop as a Service, and avoid the pitfalls.

Objectives:

- Define Desktop as a Service (DaaS).
- Discover the top considerations to avoid choosing the wrong provider.
- Identify the most important topics to discuss with your board and/or IT team.
- Calculate if DaaS is right for your firm.

Other Information:

- 60 Minutes
- Audience: Advanced
- CLM Application Eligible: No
- CLM App Management Category -FS: Operations Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Computer Software and Applications

CM24: The Five Roles of the Master Herder: Leadership for Law Firm Leaders

Tuesday, April 16 4:00 PM - 5:15 PM

Like master herd, law firm leaders are responsible for herding various personalities toward a common goal. Linda Kohanov's research extracts the skills of ancient master herd to give today's law firm leaders a sophisticated understanding of leadership and group cohesion. This knowledge, virtually lost to modern "civilized" leaders, is based on the little-known fact that among cattle and horses, the master herder has perfected five leadership roles, seamlessly moving from one to the next to bring the herd where it needs to go. Attend this session to learn how the five roles of the master herder can be applied to equip your leaders to manage ever-changing resources, schedules and personalities within complex legal environments.

Objectives:

- Set up your leaders to manage ever-changing resources.
- Prepare your leaders to manage schedules.
- Devise training for your leaders to manage personalities within complex legal environments.

Other Information:

- 75 Minutes
- Audience: Advanced
- CLM Application Eligible: Yes
- CLM App Management Category: Organizational Development

Watch a short promo video of this session.
**LI23: Build Business by Building Up Your Attorneys**

**Tuesday, April 16  4:00 PM - 5:15 PM**

The successful law firm landscape is changing and transforming. No longer can the primary focus and incentive only be the billable hour. In order for firms to thrive and continue on for future generations, they need to look at the long-term goals and incentivize the activities that will hopefully help them achieve those goals. This session will take you through the real-time story of how a 53-year-old law firm finally abandoned the incentive on billable hours in favor of a more versatile and strategic approach focused on incentivizing attorneys to become well-rounded with activities to build their own client base.

**Objectives:**

- Examine the reasons to abandon the incentive on billable hours.
- Identify the activities and criteria to incentivize to assist attorneys in becoming better attorneys and business generators.
- Discuss how to develop your own accountability and rating process for the attorneys.
- Illustrate how to develop and implement plans of work for attorneys.

**Other Information:**

- 75 Minutes
- Audience: Advanced
- CLM Application Eligible: No
- CLM App Management Category -FS: Legal Industry/Business Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Personnel/HR

**Speaker Info:**

Sarah Janosik, LCSW, is Founder and Clinical Director of Relate Center. She has been in private practice for more than 20 years. Janosik specializes in sex, intimacy and couples counseling. She is actively involved in developing workshops surrounding sexual issues and raising public awareness regarding these sensitive issues. She has authored articles on sexuality and intimacy and continues to lecture on these topics professionally. Janosik received her post-graduate training in human sexuality at the University of California Medical School, San Francisco, in 1981. She is board-certified diplomate and licensed in clinical social work. She also provides workshops and individual sessions as an equine-assisted therapy and learning specialist.

Sarah Janosik, LCSW

Natalie Loeb, MS, is the Founder of Loeb Leadership Development Group, a certified woman-owned business with more than 30 coaches and consultants who are dedicated to developing leaders. In addition to being a successful business leader, Loeb is a leadership coach and facilitator with more than 20 years of experience working with leaders at all levels. She coaches partners, associates, new and seasoned managers, and chief executive officers. Loeb was a member of the human resources team at Skadden, Arps, Slate, Meagher & Flom LLP.

Natalie Loeb, MS

**Location / Room:** Grapevine D

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**HR23: Dear Helga’s Back and She Has New and Even More Difficult Issues Confronting Your Law Firms**

**Tuesday, April 16  4:00 PM - 5:30 PM**

As law firm management professionals and those with law firm human resources responsibilities, we've all said it: “I would write a book, but who would believe these stories are true?” Unfortunately, many of our tales are far too real. Whether the situation involves workplace sexual harassment, conducting internal investigations, transgender employees or others, the legal workplace has become far more complicated to manage. This fast-paced, interactive and entertaining session will focus on uncommon HR issues in the law firm.
context and examine practical, business-focused solutions that you can use immediately to solve those problems.

Objectives:

- Identify when a complicated issue arises. Identification is often overlooked. If administrators and HR professionals do not recognize that there is an issue, they cannot solve the problem.
- Receive tools with which to solve these novel or confusing law firm concerns.
- Discuss how to communicate with the "higher-ups" within law firms so that they are best able to communicate the "whys" and "hows" of solving these problems.
- Recognize practical and business-focused solutions to often complicated and difficult law firm employee-related issues.

Other Information:

- 90 Minutes
- Audience: Intermediate
- CLM Application Eligible: No
- CLM App Management Category -FS: Human Resources Management
- CLM Recertification Eligible: Yes
- HRCL: General Credit
- SHRM: Consultation
- SHRM Learning Format: Instructor-Led Activity
- CLE: Participatory Credit
- CPE Field of Study: Personnel/HR

Speaker Info:

Michael S. Cohen, JD, is a Partner at Duane Morris LLP in Philadelphia in the firm's Employment Services Practice Group, where he concentrates his practice in the areas of employment law training and counseling. A highly rated ALA speaker, he has trained and counseled employees throughout the country on employment subjects, including harassment prevention, diversity, discipline, hiring, firing, recruiting, performance evaluations and compliance.

Location / Room: Grapevine C

OM25: Artificial Intelligence 101 | Brought to you by ALT (the Association of Legal Technologists) (Session 3)

Tuesday, April 16 4:00 PM - 5:30 PM

There has never been more noise in the legal marketplace about any technology as there is today about artificial intelligence (AI). Every day we see articles, press releases, conferences, webinars and more about how AI will impact the future of legal. AI has the potential to change not only how legal work gets done but also — through its value as a predictive mechanism — what legal work gets done. This session is designed to help attendees better understand what AI is, what it can do in the context of the legal function, and how to leverage AI tools for your law firm's or legal department's benefit.

Objectives:

- Define AI as it pertains to the legal field.
- Discuss how AI effects productivity and efficiency.
- Identify the AI tools that are available for legal.

Other Information:

- 90 Minutes
- Audience: Essentials
- CLM Application Eligible: No
- CLM App Management Category -FS: Operations Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Administrative Practice

Speaker Info:

Arup Das is the Founder and Chief Executive Officer of New York-based Alphaserve Technologies, a digital transformation advisory and managed services technology service provider to legal, financial, health care and global multinationals. Over his 20-plus year career as an entrepreneur in the technology services industry, Das has founded three successful venture capital and private equity-backed IT services companies serving global enterprise clients. He is a thought leader in the industry of digital transformation strategy and technologies, and has domain expertise in asset management, and legal and media industries.

Location / Room: Grapevine B
Exhibit Hall Networking Reception

Tuesday, April 16  5:30 PM - 6:30 PM
After a full day of education, join our exhibitors and your colleagues for this relaxing reception before heading out to dinner.

Location / Room: Longhorn DEF

Healthy Start: Zumba

Wednesday, April 17  6:00 AM - 6:45 AM
Wednesday morning you are welcome to join a group for Zumba!

Zumba is a Latin-inspired cardio-dance workout that uses music and choreographed steps to form a fitness party atmosphere. While many of the types of dance and music featured in the program are Latin American inspired, classes can also contain everything from jazz to African beats to country to hip-hop and pop.

Location / Room: Conv Center Circle Drive

Healthy Start: 5K Run or Walk

Wednesday, April 17  6:00 AM - 7:00 AM
Enjoy the outdoors Wednesday morning and run or walk a brisk 5K.

Location / Room: Hotel Main Lobby

Friends of Bill

Wednesday, April 17  6:45 AM - 7:15 AM

Location / Room: San Antonio 1

Breakfast

Wednesday, April 17  7:30 AM - 8:00 AM

Location / Room: Center Prefunction

Silent Auction

Wednesday, April 17  7:30 AM - Noon

Location / Room: Center Prefunction

Registration

Wednesday, April 17  7:30 AM - 6:00 PM

Location / Room: Center Prefunction

CM30: Better Way to Great

Wednesday, April 17  8:00 AM - 9:00 AM

In the frenetic pace of the legal administration industry, personal drive and ambition are vital to success. Type A thrive. Being indispensable is tantamount to being great. But when you find yourself frantic, distracted and overwhelmed instead of staying grounded, focused and fulfilled, you may have reached a tipping point that can be counterproductive to your success. You may have an outcome addiction — the "doing more gets you more" mindset, which can blind you to your own intuition and insight and inhibit your productivity. There is a better way.

Objectives:

- Recognize the signals of your own tipping point.
• Recall on the perspective shift that challenges your belief of "doing more gets you more."
• Discover that there is a purpose in the process, which will lead to better performance and fulfillment.
**Watch a short promo video of this session.**

**Other Information:**

• 60 Minutes
• Audience: Advanced
• CLM Application Eligible: Yes
• CLM App Management Category: Self-Management Skills
• CLM Recertification Eligible: Yes
• HRCI: General Credit
• SHRM: Communication
• SHRM Learning Format: Instructor-Led Activity
• CPE Field of Study: Personal Development

**Speaker Info:**

[Dean Savoca, MEd, BCC, CSP](#), a performance management and results expert who works at the individual executive level as a coach, at the team and department level as a trainer and facilitator, and at the company and association level as a keynote speaker. He guides teams through processes that focus their attention on core issues and rallies them to action. Savoca has nearly 20 years of experience in working with executives and employees of companies ranging from small businesses to professional organizations to Fortune 500 companies.

**Location / Room:** Texas C

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**FM30: Rethinking Partner Compensation in a Changing Marketplace: Profitability, Partner Comp, Pricing Track (Session 2)**

**Wednesday, April 17 8:00 AM - 9:00 AM**

The changing legal market is forcing law firm leaders to rethink what it means to be a partner, and to reevaluate the relative value of the various contributions partners make to the firm. In this interactive session, we’ll illustrate how law firm leaders are incorporating more sophisticated measures of profitability into partner compensation, and using compensation plans to drive — and not just reward — desirable behavior.

**Objectives:**

• Examine the traditional components of partner compensation and why they are lacking.
• Explore new ways of measuring and rewarding partner contributions as part of building a high-performance culture.
• Recognize the obstacles and best practices faced by other law firms as they assess and adapt partner compensation plans.

**Other Information:**

• 60 Minutes
• Audience: Advanced
• CLM Application Eligible: No
• CLM App Management Category - FS: Financial Management
• CLM Recertification Eligible: Yes
• HRCI: General Credit
• SHRM: Business Acumen
• SHRM Learning Format: Instructor-Led Activity
• CLE: Participatory Credit
• CPE Field of Study: Personnel/HR

**Speaker Info:**

[Timothy B. Corcoran](#) is a Principal with the Corcoran Consulting Group and a Past President of the Legal Marketing Association. In his practice, he advises law firm leaders, in-house counsel and legal service providers on how to profit during a time of great change. This includes assisting law firm leaders with business strategy, primarily in the areas of operational excellence and business growth, and assisting in-house counsel with managing preferred provider programs.

**Location / Room:** Grapevine A

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**HR30: Risk Management of Your Employment Practices**

**Wednesday, April 17 8:00 AM - 9:00 AM**

Once an organization hires staff, it is exposed to risk and liability that not every manager or leader is familiar with, prepared for, or trained to handle effectively. This session provides a strong foundation for understanding the various risks and liabilities inherent in your employment practices. The presenter will discuss the employee lifecycle, pointing out the practices you execute and the risks to
manage to avoid liability. Attendees will benefit from receiving guidance and strategies on being an effective supervisor, achieving effective engagement, improving job performance, and enhancing your communication with your workforce.

Objectives:

- Formulate a comprehensive understanding of the scope of employment practice risk and liability.
- Demonstrate the correlation between effective employment practices and its impact on the workforce.
- Distinguish how the supervisor/manager can be one of the greatest risks to the employer.
- Employ proactive strategies for effective management, engagement, and communication.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM Application Eligible: No
- CLM App Management Category -FS: Human Resources Management
- CLM Recertification Eligible: Yes
- HRCL: General Credit
- SHRM: Relationship Management
- SHRM Learning Format: Instructor-Led Activity
- CLE: Participatory Credit
- CPE Field of Study: Personnel/HR

Speaker Info:

Warren Cook leads SymbianceHR and consults with small to mid-size organizations across industries nationally. He provides strategic advisory services on human resources infrastructure, policy development, risk management of employment practices, workforce communication, employee relations, engagement training and process engineering to maximize the productivity of the workforce. Cook has been providing coaching and human resources services to business leaders, human resources professionals and C-suite executives successfully for 24 years.

Location / Room: Grapevine C

HR31: The Addicted Lawyer: How We Got There, Where We Are Headed

Wednesday, April 17 8:00 AM - 9:00 AM

Law is a demanding field, and attorneys expect even more of themselves. Attorneys sometimes turn to substances to escape from daily problems and cope with their enormous workload. In this presentation, we will explore addiction in the legal profession, why lawyers suffer at significantly greater rates than the general public, and what the profession could/should be doing to address the problem.

Objectives:

- Discuss the presenter's personal journey with depression, drug and alcohol addiction and how they affected his career as a lawyer.
- Identify key data affecting the profession from the Betty Ford Hazelden/ABA Study.
- Discover the stigma lawyers face in seeking help.
- Examine how the profession as whole from top down can break that stigma.
- Identify the resources currently in place and new resources needed.

Other Information:

- 60 Minutes
- Audience: Essentials
- CLM Application Eligible: No
- CLM Recertification Eligible: Yes
- CLM Recertification: Substance Abuse
- HRCL: General Credit
- SHRM: Communication
- SHRM Learning Format: Instructor-Led Activity
- CLE: Competence Issues
- CPE Field of Study: Personnel/HR

Speaker Info:

Brian Cuban, the younger brother of Dallas Mavericks owner and entrepreneur Mark Cuban, is a Dallas-based attorney, author and addiction recovery advocate. He has been in long-term recovery from alcohol, cocaine and bulimia since April 2007. He has authored two books that address the mental health issues and addiction that destroyed his career, and he has spoken at colleges, universities, conferences, nonprofits and legal events across the United States and Canada. Cuban has also appeared on prestigious talk shows and numerous media outlets around the country. He is a graduate of Penn State University and the University of Pittsburgh School of Law.

Location / Room: Texas 4-6
LI30: Bright Insight: Spotlight on the Challenges and Trends Facing Today's Legal Sector

Wednesday, April 17 8:00 AM - 9:00 AM

Maintaining your firm's competitive stance in the legal sector is a constant challenge. Sherry Cushman, Executive Managing Director of Cushman & Wakefield's Legal Sector Advisory Group, will be moderating a panel of three (3) legal sector experts from the business, workplace and technology industries to discuss the future shifts and trends of the legal sector and the impact it will have on the legal sector in the next decade.

Join in a lively discussion including Andrew Baker, Senior Director of HBR Consulting, Will Gaus, CIO of Pepper Hamilton, and Steve Martin, co-lead of Gensler's global law firm practice. From business and technology to the future trends in workplace strategy and design, this panel will offer insights on the continued shifts within the legal sector, and how law firms are making significant changes to remain competitive in the coming years.

This session will also include a first look at the 2019 Bright Insight National Legal Sector Benchmark Survey Results conducted by Cushman & Wakefield and ALM Legal Intelligence. The results of the 2019 Survey contain feedback compiled from nearly 1100 survey respondents from law firms and of all shapes and sizes and provide an enlightening look into the key drivers affecting law firms across the country today.

Objectives:

• Review how the legal sector is swiftly changing and how firms can plan for these changes.
• Review in detail three top drivers currently impacting the legal sector: business, technology, and workplace.
• Review how business and operational decisions are being made differently today and how smart decisions and change can dramatically improve operations, client services, internal collaboration, and overall business and profitability.
• Provide specific examples and statistics on how law firm leaders and professionals are consensus building internally to affect future change.

Other Information:

• 60 Minutes
• Audience: Intermediate
• CLM Application Eligible: No
• CLM App Management Category -FS: Legal Industry/Business Management
• CLM Recertification Eligible: Yes
• CLE: Participatory Credit
• CPE Field of Study: Business Management & Organization

Speaker Info:

Steven Martin, AIA, FCOLOM, is a Firmwide Leader of Gensler's Global Law Firm Practice, based in Washington, D.C. He has 35 years of strategic planning and design experience as a Project Director for a diverse group of law firms. A sought-after speaker, Martin is an expert on emerging trends in law firm design. He was an integral team member in developing Gensler's groundbreaking exhibit, "Redesign Law: The Legal Office of the Future." He is also a Fellow of the College of Law Practice Management.

Sherry Cushman is Executive Managing Director and Leader of Cushman & Wakefield's Legal Sector Advisory Group (LSAG), where she has spent more than 31 years advising legal sector tenants. With more than 300 advisers globally, she coordinates LSAG's initiatives and national benchmarking, and serves as a thought leader and strategist. Her focus is on implementing real estate solutions that integrate firms' business, financial and operational goals, focusing on improving profitability and strategy development.

Andrew Baker is a Senior Director at HBR Consulting and leads the company's Digital Services and Analytics Practice. He has over 10 years of experience in delivering strategic, operational, and technology advice and solutions to law firms and corporate legal departments. Andrew specializes in working with clients to reimagine and modernize legal services to increase efficiency, improve predictability, enhance customer experience, and reduce risk. Andrew's practice focuses on digital services, data analytics, knowledge management, service design, and process improvement as applied to legal practice.

William Gaus is the Chief Information Officer of Pepper Hamilton LLP, where he oversees the information technology department and all technology projects for the firm's 14 offices across the United States. Mr. Gaus joined Pepper Hamilton in 2018, bringing 20 years of global experience in knowledge management, user experience and product design to the firm. At Pepper, Mr. Gaus focuses on executing technology solutions that help lawyers work more efficiently and better serve clients.

Location / Room: Texas 1-3

OM30: Business Continuity and Emergency Preparedness Challenges and Best Practices

Wednesday, April 17 8:00 AM - 9:00 AM
This highly informative and interactive session is geared toward professionals in the legal industry who would like more knowledge in the areas of business continuity and emergency preparedness. The panel of industry experts and representatives from some of America's top law firms will discuss why staying ahead of any business disruption is the best way to ensure continuity of operations if an incident does occur. They will detail some of the most common challenges and how to overcome those, as well as industry best practices. How does your law firm stack up?

Objectives:

- Recognize the importance of business continuity and emergency preparedness as it relates to the legal industry.
- Discuss the challenges that your law firm has faced when implementing business continuity and emergency plans.
- Identify the necessary steps to take to ensure your law firm is protected and prepared ahead of a threat to employees, business operations and brand reputation.

Other Information:

- 60 Minutes
- Audience: Intermediate
- CLM Application Eligible: No
- CLM App Management Category -FS: Operations Management
- CLM Recertification Eligible: Yes
- HRCI: Strategic Business Management Credit
- SHRM: Communication
- SHRM Learning Format: Instructor-Led Activity
- CLE: Participatory Credit
- CPE Field of Study: Business Management & Organization

Speaker Info:

Kathryn Scurrby is the Principal of KNS Consulting, LLC. She works with professional service firms to achieve their goals in the areas of business continuity, disaster preparedness, risk management and compliance. Scurrby trains management professionals and all levels of staff at private service firms and facilitates table-top exercises in these focus areas. Additionally, she served on ALA's Board of Directors (2004–2008), was a Trustee for the Foundation of the Association of Legal Administrators (2010–2013), and currently serves on ALA's International Relations Committee.

Wade Tucker joined Preparis in May 2014 as Vice President of Sales and was appointed as Chief Sales Officer in December 2014. Since coming to Preparis, Tucker has increased overall revenue by more than 250 percent and has led the company to its best two years in company history. Before Preparis, he led the West Coast Healthcare Team at AirWatch that was acquired by VMWare in February 2014 for $1.5 billion. Tucker also led the SignUp4 sales team, taking them from startup to $1 million in revenue to $7 million in revenue. SignUp4 was bought by CVENT.

John Hartnett, Director of Administration for the Charlotte office of Alston & Bird, LLP, oversees all functions related to HR, Finance, Budgeting, Facilities Management, and Administrative Services for this 190 person location. Additionally, Hartnett handles the Disaster Recovery and Business Continuity program for all eleven of the firm's offices throughout the country and abroad. Prior to joining Alston & Bird in 2006, he was the Director of Administration for Greenberg Traurig, PA's Miami Headquarters, handling similar functions as he does today.

Jim Rosenbluth is the President of Analytic Risk Solutions, a security and business continuity consultancy providing tailored risk mitigation services to businesses, nonprofits, and commercial real estate and critical infrastructure owners and operators worldwide. Rosenbluth was the head of security and business continuity at Cushman & Wakefield, a global commercial real estate firm, from 2005 to 2018. Prior to joining C&W, he served as an operations officer in the Directorate of Operations of the CIA, from which he retired in 2005.

Location / Room: Texas D

OM31: How to Assess and Select Legal Technology

Wednesday, April 17 8:00 AM - 9:00 AM

The right technology can transform how legal work gets done and streamline legal operations. If you’re considering investing in new solutions, this session will outline a best-in-class process for evaluating and selecting the right software including defining requirements, managing an effective RFP process, creating selection criteria and facilitating meaningful technology demonstrations with vendors. This session will also cover barriers to user adoption and pitfalls common to introducing new technology in a law firm or legal department.

Objectives:

- Evaluate key considerations when deciding whether to implement new technology.
- Describe the steps in assessing and selecting new software.
- Explore how organizational change management can help improve user adoption.
- Predict challenges specific to implementing technology for legal operations.

Other Information:

- 60 Minutes
- Audience: Intermediate
• CLM Application Eligible: Yes
• CLM App Management Category: Information Technology
• CLM App Management Category -FS: Operations Management
• CLM Recertification Eligible: Yes
• CLE: Participatory Credit
• CPE Field of Study: Computer Software and Applications

Speaker Info:

Jeff Barlow is a Co-Founder of Nimble Services LLC, a legal consulting and alternative legal services company. Nimble helps companies optimize legal spend and legal service delivery through evaluating a company's legal operations, processes and procedures. He also helps law firms establish more efficient legal service delivery processes to pass on more value to clients. Barlow is an experienced General Counsel who was responsible for all legal aspects of transaction, litigation and compliance.

Elizabeth Brooks is the Co-Founder of Nimble Services LLC, where she drives overall business strategy and leads the HR and professional development practice area. Nimble works with law firms and companies to make legal, HR and talent their strategic differentiator. Before devoting her work full time to Nimble, Brooks held strategic HR positions in large, global companies like Eaton Corporation, Precision Castparts and Swagelok.

Location / Room: Grapevine 1-3

Exhibit Hall Coffee Break

Wednesday, April 17  9:00 AM - 9:45 AM
Location / Room: Longhorn DEF

Exhibit Hall Hours

Wednesday, April 17  9:00 AM - 1:15 PM
Location / Room: Longhorn DEF

Recharge Your Health: All-Day Energy

Wednesday, April 17  9:15 AM - 9:30 AM
Join Lance Breger in the Recharge Your Health Lounge in the Exhibit Hall and experience the Wellness Lab, NEW this year!

Location / Room: Exhibit Hall Booth 1235

HR34: Brezina Memorial Session: Get Out of Your Silo: How to Respectfully Discuss Race, Gender, and Politics in a Fragmented World

Wednesday, April 17  9:45 AM - 11:15 AM
This session is sponsored by the Foundation of the Association of Legal Administrators.

Racism. Privilege. #MeToo. #BlackLivesMatter. For the past several years, words and phrases have become so charged that debates and discussion quickly veer into anger and accusations. At the same time, many of us no longer leave our siloed workspace to have real conversations in real life. We also live in an online world where our opinions are reinforced without counterweight. That online self-segregation extends to our homes, neighborhoods and friends.

But challenging our opinions is necessary. To create cultures of authenticity and belonging, we need to have genuine conversations about what makes us different. Those conversations lead to successful mentoring relationships, collaborative teams, engaged workforces, and the opportunity for everyone to understand the struggles that their colleagues face. This session will discuss how the silo inhibits hard conversations, and provide practical advice on how to respectfully engage in difficult conversations to create a strong community of colleagues, coworkers and friends.

Objectives:

• Discuss how to leave your silo to seek knowledge, listen to understand and assume the role of learner.
• Recognize how to center every conversation outside the silo on respect and inclusion.
• Review Applied Moral Foundations Theory to understand how similar people can share different ideals.
• Describe conflict negotiation practices and how to use them to move from mutually exclusive positions to shared interests.

Other Information:

• 60 Minutes
• Audience: Essentials
• CLM Application Eligible: Yes
• CLM App Management Category: Organizational Development
• CLM Recertification Eligible: Yes
• HRCI: General Credit
• SHRM: Communication
• SHRM Learning Format: Instructor-Led Activity
• CLE: Recognition and Elimination of Bias in the Legal Profession and Society
• CPE Field of Study: Personnel/HR

Speaker Info:

Michelle Silverthorn is the Founder and Chief Executive Officer of Inclusion Nation, a diversity consulting firm based in Chicago. A graduate of Princeton University and the University of Michigan Law School, Silverthorn practiced for two large law firms before transitioning into the legal education field where she trained thousands of attorneys about diversity and inclusion. She is a columnist for Legal Management, a TEDx speaker, and the author of the forthcoming book, Your Organization is Not a Melting Pot: How to Recruit, Train and Lead a Diverse Workforce.

Location / Room: Texas Ballroom

Exhibit Hall Lunch

Wednesday, April 17 11:15 AM - 1:15 PM
Sponsored in part by Rippe & Kingston.
Location / Room: Longhorn DEF

Recharge Your Health: Quick Meals Made Easy

Wednesday, April 17 11:30 AM - 11:45 AM
Join Lance Breger in the Recharge Your Health Lounge in the Exhibit Hall and experience the Wellness Lab, NEW this year!
Location / Room: Exhibit Hall Booth 1235

BP32: Increasing Law Firm Profitability: More Than Just Raising Rates

Wednesday, April 17 11:30 AM - Noon
By LexisNexis
Increasing profits is always a goal and a challenge in any business. The challenge for lawyers can be overwhelming. Evaluating matter profitability and proper reporting can provide a means to increasing productivity and income. Understanding all the components that impact profitability can help law firms increase their bottom line.

Speaker:

Deborah Schaefer is a consultant specialized in the legal market. She has been retained by law firms of all sizes, assisting with the selection, implementation, training, and support of computer-based accounting and practice management systems. Her services also include basic bookkeeping for law firms, and business and practice management consulting.

Location / Room: Solutions Hub C

Meet Your Chapter Leader Resource Team

Wednesday, April 17 11:45 AM - 1:00 PM
All chapter leaders are invited to participate in one of the two Meet the Chapter Resource Team sessions. During these sessions, attendees will have the opportunity to meet with the team and share thoughts on how it might best serve ALA chapters.

The first session is Monday, April 15, 12:30-1:45 p.m. The second is Wednesday, April 17, 11:45 a.m.-1 p.m.

IMPORTANT: since both session options are scheduled at the same time as lunch, a buffet will be available outside the session room on a first come, first served basis.

Location / Room: San Antonio 4-6
Silent Auction Bidding Ends

Wednesday, April 17  Noon - Noon
Location / Room: Center Prefunction

Recharge Your Health: Two Minutes to Less Stress

Wednesday, April 17  Noon - 12:15 PM
Join Lance Breger in the Recharge Your Health Lounge in the Exhibit Hall and experience the Wellness Lab, NEW this year!
Location / Room: Exhibit Hall Booth 1235

BB30: Don't Wait to Get Permission to Be Heard

Wednesday, April 17  Noon - 12:15 PM
In the wave of women's empowerment — and shifting emphasis on inclusion —how do you ride the wave without swamping the men in control around you? How can you be heard and be respected as an equal when there’s a "power" gap? What are the three things you can do ahead of meetings to make sure your ideas are valued? It’s a tricky maze to navigate when you're not an attorney and when there are old cultural norms that do not serve you. What are the best approaches to empower yourself to be influential and still be authentic?

Speaker Info:

**Deborah Johnson** is a six-time Emmy Award-winning Writer and Producer. Her master's degree in cognitive psychology and television production from the University of Washington, combined with a rich history of experience, gives her unique insights into how to communicate with more influence and impact. She has consulted in a variety of civil and criminal cases, including a $5.3 million civil rights case and numerous multimillion-dollar divorce cases. Johnson is an international speaker and has been published nationally and internationally.

Location / Room: Ft. Worth 5-7

BB31: Engaging the Power of Your Informal Networks

Wednesday, April 17  12:15 PM - 12:30 PM
Much has been written about how successful leaders and executives participate in formal networks, but very little is known about the substantial amount of time they spend within their informal networks. These most prized networks are filled with the power and potential to help you achieve success. You will leave this high-energy and engaging program with tips, tools and techniques that can be applied immediately.

Speaker Info:

**Michele Wierzgac**, MSEd, is the “Lady on the Harley,” providing business solutions through keynote presentations. Her high-energy and momentum-building keynote, “Business Solutions from the Lady on the Harley,” speaks to the core and application of how we in the business arena seek out solutions without getting dragged into problems and solutions. Getting stuck is not an option — it's business death. She’ll teach attendees how to avoid business death.

Location / Room: Ft. Worth 5-7

Recharge Your Health: Express Chair Stretching

Wednesday, April 17  12:30 PM - 12:45 PM
Join Lance Breger in the Recharge Your Health Lounge in the Exhibit Hall and experience the Wellness Lab, NEW this year!
Location / Room: Exhibit Hall Booth 1235

BB32: Smart Securities: Blockchain and Crypto Meets Legacy Finance

Wednesday, April 17  12:30 PM - 12:45 PM
Securities regulation continues to evolve and become ever more complex. Yet, securities themselves remain anchored in traditional
legal concepts such as company and contract law, stocks and bonds, equity and debt. With the advent of blockchain technology and cryptographic tokens, this is quickly changing. Welcome to the world of purely digital and programmable "smart securities." Smart securities exist beyond traditional law and (sometimes) even beyond the concept of law itself. They are infinitely malleable, and reside solely on blockchain networks. The emerging capabilities of smart securities will allow forward-thinking legal professionals to develop new and creative financial solutions. Of course, figuring out how to regulate these smart securities is keeping the SEC up at night...

Speaker Info:

Gordon H. Einstein, Esq., is a hybrid Crypto-Attorney, Technologist and Enterprise Strategist. He received his undergraduate degree in politics in 1991 from Brandeis University in Boston and then received his JD in 1995 from the USC Gould School of Law in Los Angeles. Most of his law practice involves working with crypto, blockchain and fintech startups and funds. This was formalized as CryptoLaw Partners in 2017. Einstein frequently speaks and educates in the United States and abroad, quite often in Ukraine. Some common themes are issues and developments relating to cryptocurrency, the legal aspects of financial technology, structuring blockchain startups, ICOs and AML/KYC compliance.

Location / Room: Ft. Worth 5-7

BP33: Training Strategies to Increase Firm Productivity and Security Awareness

Wednesday, April 17  12:30 PM - 1:00 PM

By Capensys

What are the best ways of ensuring attorneys and support staff are sufficiently skilled to be productive and to work efficiently and safely with their IT systems? We will cover successful training and rollout strategies to boost user productivity and increase security awareness easily and effectively.

Speaker:

Janis Richman, Director of Consulting

Location / Room: Solutions Hub A

BP34: Independent Contractor vs. Employee: Classifying Workers Correctly to Avoid Penalties

Wednesday, April 17  12:30 PM - 1:00 PM

By Adams & Martin Group

Before classifying someone as an independent contractor (also known as self-employed workers, freelancers, or 1099s), it is important that law firms and legal departments understand the subtle differences between a contractor and an employee, as well as the possible repercussions of misclassification. In this presentation, Kristy Carbajal, Vice President of Adams & Martin Group, will review the key elements required to classify an individual as an independent contractor as well as the most common errors seen frequently among her organization's clients. She will also discuss the recent case, Dynamex Operations West, Inc. v. Superior Court of Los Angeles, and its ramifications for organizations nationwide.

Speaker:

Kristy Carbajal is Vice President of Adams & Martin Group, a values-driven, full-service legal staffing firm with locations throughout the United States. Carbajal has been with the company since 2005, managing all operations, including teams of legal recruitment professionals who take pride in creating remarkable experiences for their clients. Adams & Martin Group's parent company, Roth Staffing, has earned multiple awards, including being named Fortune's #1 Best Workplace for Women.

Location / Room: Solutions Hub B

FM31: Rethinking Pricing in a Changing Marketplace: Profitability, Partner Comp, Pricing Track (Session 3)

Wednesday, April 17  1:15 PM - 2:15 PM

In today's price-sensitive legal marketplace, it's critical for law firms to strategically price legal services to both ensure a profit and client satisfaction. Law firm leaders must understand the science behind pricing strategy, as well as the art of persuading partners to adopt new behaviors. In this interactive session, we'll connect the dots between price, service delivery, quality and profitability.

Objectives:

• Examine the traditional approaches to pricing legal services and why they are lacking.
• Explore new ways of pricing that balance market demand and practice innovation.
• Recognize the obstacles and best practices faced by other law firms as they evolve their approach to pricing.

Other Information:
LI31: Clients Rule: Emerging Risks for Law Firms

Wednesday, April 17 1:15 PM - 2:15 PM

Large law firms are seeing increased demands from clients for more efficient ways to provide legal services and contractual requirements within outside counsel guidelines. This session will address how some of these changes may impact a firm's Professional Liability Insurance and risk profile. Law firm chief financial officers (CFOs), chief operating officers (COOs) and Executive Directors involved in the professional liability insurance buying decision will learn how to provide guidance to firm management in dealing with increased client demands.

Objectives:

- Identify the legal malpractice and other risks associated with ways that firms are being asked to meet client demands, such as secondment attorneys, online services for clients, apps, etc.
- Identify the insurance coverage risks from offering legal services in different ways.
- Identify why it's important to manage "outside counsel" guidelines.

Other Information:

- 60 Minutes
- Audience: Advanced
- CLM Application Eligible: No
- CLM App Management Category -FS: Operations Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Management Advisory Services

Speaker Info:

Timothy B. Corcoran is a Principal with the Corcoran Consulting Group and a Past President of the Legal Marketing Association. In his practice, he advises law firm leaders, in-house counsel and legal service providers on how to profit during a time of great change. This includes assisting law firm leaders with business strategy, primarily in the areas of operational excellence and business growth, and assisting in-house counsel with managing preferred provider programs.

Location / Room: Grapevine A
CM31: Establishing Effective Professional Relationships

Wednesday, April 17  1:15 PM - 2:30 PM

Astonishing results can be achieved when a leader invests time in the development of strong professional relationships. It is not what you know, but who you know that matters. The power of being connected to the right people results in success. Today's leaders need to have a balance of give and take. Professional relationships are two-fold: You help others achieve their goals, and you let others know about your skills, talents, projects and goals. You will leave this high-energy and engaging program with tips, tools and techniques that can be applied on the job immediately.

Objectives:

- Recognize the importance of professional networking.
- Identify key professionals to include in your network.
- Develop strategies to remain visible within your network.

Other Information:

- 75 Minutes
- Audience: Intermediate
- CLM Application Eligible: Yes
- CLM App Management Category: Communication Skills
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- SHRM: Relationship Management
- SHRM Learning Format: Instructor-Led Activity
- CLE: Participatory Credit
- CPE Field of Study: Personal Development

Speaker Info:

Michele Wierzgac, MSEd, is the "Lady on the Harley," providing business solutions through keynote presentations. Her high-energy and momentum-building keynote, "Business Solutions from the Lady on the Harley," speaks to the core and application of how we in the business arena seek out solutions without getting dragged into problems and solutions. Getting stuck is not an option — it's business death. She'll teach attendees how to avoid business death.

Location / Room: Texas D

CM32: Increase Your Influence: Discover Eight Attributes of Successful Leaders

Wednesday, April 17  1:15 PM - 2:30 PM

Everyone can be a leader, regardless of position. Whether you're the office manager, paralegal or partner, leadership is about influence. How much influence do you have? To be an effective leader, you must be able to influence yourself — by evaluating and managing your own behaviors and habits — before you can influence others, and ultimately, your organization or community. In this session, we'll discuss the Eight Essential Attributes of Successful Leaders in one dynamic program based on the Wheel of Influence that challenges and benefits leaders of every level of experience and organization size.

Objectives:

- Discover eight attributes of successful leaders.
- Prepare your own Wheel of Influence to guide your professional development and leadership growth.
- Identify a specific area to work on in order to balance your Wheel and achieve a higher level of influence.

Watch a short promo video of this session.

Other Information:

- 75 Minutes
- Audience: Essentials
- CLM Application Eligible: Yes
- CLM App Management Category: Self-Management Skills
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- SHRM: Leadership & Navigation
- SHRM Learning Format: Instructor-Led Activity
- CLE: Participatory Credit
- CPE Field of Study: Personal Development
HR32: Got Diversity. Get Inclusion!

Wednesday, April 17  1:15 PM - 2:45 PM

A challenge is ever present in achieving a common understanding of diversity and inclusion in the workplace. In this session, we will dispel various myths and misconceptions. We will learn about the historical and trending perspectives of diversity and inclusion and why awareness of the shift is important to your success. At all levels of the organization, the HR professional must understand what inclusion is and how an inclusive culture positively impacts ROI, engagement, loyalty and retention. This session will challenge the audience to alter their views and perspectives of diversity and inclusion and motivate everyone to consider being a champion of change.

Objectives:

- Develop a clear understanding of contrasting characteristics of diversity, affirmative action, and inclusion.
- Formulate insight into current trends and learn practical strategies that can be implemented in their respective organizations.
- Explain how an inclusive culture can directly benefit ROI, engagement, loyalty and retention.

Other Information:

- 90 Minutes
- Audience: Advanced
- CLM Application Eligible: No
- CLM App Management Category -FS: Human Resources Management
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- SHRM: Communication
- SHRM Learning Format: Instructor-Led Activity
- CLE: Recognition and Elimination of Bias in the Legal Profession and Society
- CPE Field of Study: Personnel/HR

Speaker Info:

Dean Savoca, MEd, BCC, CSP, of Savoca Performance Group, is a performance management and results expert who works at the individual executive level as a coach, at the team and department level as a trainer and facilitator, and at the company and association level as a keynote speaker. He guides teams through processes that focus their attention on core issues and rallies them to action. Savoca has nearly 20 years of experience in working with executives and employees of companies ranging from small businesses to professional organizations to Fortune 500 companies.

OM32: How Environmental Sustainability Drives Success in Operational Management

Wednesday, April 17  1:15 PM - 2:45 PM

There are varying viewpoints on the importance of environmental sustainability in the legal workplace today. Industry and Millennials are helping to drive change in sustainability as an important factor across the board, including law firms. In this session, we’ll explore how your firm can frame the conversation of operational efficiencies to keep up with the new pressures of industry and Millennials seeking sustainability, while addressing other groups of stakeholders that have different driving factors, such as cost-consciousness and efficiency.

Includes Sustainability Tour/Field Trip of the Gaylord Property

Objectives:

- Gain a deeper understanding of current work environments and cultures in firms with stakeholders, including clients, partners, associates and professional staff.
- Analyze operations and systems currently in place for opportunities to drive change and make improvements in operations with sustainability as a driving factor.
- Make a data-driven business cases for creating efficiencies in the office environment that will drive both operational success and environmental sustainability program success.

Watch a short promo video of this session.
OM34: Brave New Law Firm: Bitcoin, Cryptocurrencies and Blockchain | Brought to you by ALT (the Association of Legal Technologists) (Session 4)

Wednesday, April 17  1:15 PM - 2:45 PM

The cryptocurrency and blockchain revolutions are sweeping the globe. Despite occasional setbacks, an uncertain regulatory environment, and market volatility, it is clear that these technologies are poised to fundamentally and globally change how law and finance firms operate. Already, jurisdictions around the world are racing to either restrain or enable these developments, and proactive law firms are playing a key role in this process. This session will explain the context, history, mechanics and future direction of cryptocurrency and blockchain. Most importantly, it will empower law firms to expertly advise their clients on what to do next.

Objectives:

- Discuss the history of money and how it inevitably led to Bitcoin and other cryptocurrencies.
- Distinguish how blockchain technology works and its applications beyond Bitcoin.
- Summarize the new financing methods and business models that blockchain enables.
- Infer the regulatory and jurisdictional challenges and opportunities posed by these technologies.
- Review where this is all headed, and how law firms and their clients can survive and thrive in the face of massive change.

Other Information:

- 90 Minutes
- Audience: Essentials
- CLM Application Eligible: No
- CLM App Management Category -FS: Operations Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Economics

Speaker Info:

Gayatri Joshi serves as Executive Director of the Law Firm Sustainability Network, a nonprofit organization with a mission to help law departments utilize benchmarks and enhance sustainability in their programs and operations. Joshi is also Vice President at EcoAnalyze, a sustainability-based technology services firm. She has been published in The Environmental Forum as well as other publications. Prior to EcoAnalyze, Joshi concentrated on business development, marketing and pitch strategies at Shearman & Sterling LLP. She has been advising firms for 15 years.

Nadia Wagner is the Regional Office Administrator for the New York and Boston offices of Beveridge & Diamond, PC, a premier national environmental firm. Wagner has been in the legal industry for more than 30 years and has served on numerous committee and board positions for the New York City Chapter of ALA, including a term as President in 2004-2005. She currently serves as team leader for ALANYC’s Sustainability and Community Connections Teams. She is a graduate of SUNY at Stony Brook where she earned a bachelor’s degree in psychology.

Location / Room: Grapevine 4-6

Silent Auction Item Pickup

Wednesday, April 17  1:30 PM - 5:00 PM

Location / Room: Center Prefunction
OM33: The Resilient Legal Workplace: Flexibility and Adaptability in Practice

Wednesday, April 17  3:00 PM - 4:00 PM

Nearly every legal management professional is faced with the challenge of strategizing how to accommodate a group of incoming lawyers when their space is limited. This session is a case study illustrating how the Washington, D.C. office of Fried Frank evaluated their options and modified their 7-year-old existing workplace to accommodate an incoming class of 20 associates and some lateral hires without leasing additional space. We will share key strategies for change management and gaining endorsement from young associates and the firm's leaders, balancing the business case with cultural benefits. We will also share survey results and testimonials of those using the new space.

Objectives:

• Outline practical and proven insights into how to anticipate and accommodate lawyer growth within their existing offices in a cost-effective manner without leasing additional space.
• Recognize new ways of working for the next generation of lawyers entering the legal industry and the work settings and amenities required for success.
• Discover insight into a proven change management process for endorsement by young lawyers and senior firm leadership.
• Examine and be equipped with the tools to build a business case for the modifications.
• Identify and benefit from the ideas and experiences of their peers shared during interactions.

Other Information:

• 60 Minutes
• Audience: Essentials
• CLM Application Eligible: No
• CLM App Management Category -FS: Operations Management
• CLM Recertification Eligible: Yes
• CLE: Participatory Credit
• CPE Field of Study: Finance

Speaker Info:

Michelle Hand-Arevalo has more than 25 years of legal industry experience. She joined Fried Frank in 1996. Besides overseeing the firm’s legal assistants, staff attorneys and discovery attorneys, she is responsible for the overall operations and facilities management for the Washington, D.C., office. Hand-Arevalo is on the Advisory Board for Ricoh USA, Inc., and has spoken on the topic of challenges firms face in working with a dynamic and evolving workforce. She is also a member of the International Paralegal Management Association and has spoken at their annual conference on outsourcing. Before joining Fried Frank, she worked for a company that handled litigation support for the Department of Justice's Civil Division.

Steven Martin, AIA, FCOLOM, is a Firmwide Leader of Gensler's Global Law Firm Practice, based in Washington, D.C. He has 35 years of strategic planning and design experience as a Project Director for a diverse group of law firms. A sought-after speaker, Martin is an expert on emerging trends in law firm design. He was an integral team member in developing Gensler's groundbreaking exhibit, “Redesign Law: The Legal Office of the Future.” He is also a Fellow of the College of Law Practice Management.

Location / Room: Grapevine 1-3

FM32: The Performance Metrics Dashboard: A Powerful Management Tool!

Wednesday, April 17  3:00 PM - 4:15 PM

Law firms measure various behaviors and business indicators of firm health and performance. The challenge is to identify the set of metrics that are critical to the success of the law firm and to create a dashboard to effectively manage the law firm. This session will look comprehensively at performance metric dashboards as a management tool used to track key performance indicators (KPIs), metrics, and other key data points relevant to the law firm, a practice group, or a specific process, dashboard design and implementation. Using data visualizations, we will discuss how dashboards simplify complex data sets to provide law firms with "at a glance" awareness of current performance.

Objectives:

• Classify the different types of law firm KPIs and how they can be used in a performance metric dashboard to improve profitability and contribute to strategic initiatives.
• Discuss the Balanced Score Card approach in developing dashboards which address financial, strategic and operational performance, including client satisfaction and other marketing KPIs.
• Identify the prerequisites necessary for developing and implementing dashboards, as well as the importance of interpreting performance metric dashboards with an introduction to legal lean, six sigma and process management.

Other Information:

• 75 Minutes
• Audience: Advanced
Objectives:
- CLM Application Eligible: No
- CLM App Management Category -FS: Financial Management
- CLM Recertification Eligible: Yes
- CLE: Participatory Credit
- CPE Field of Study: Business Management & Organization

Speaker Info:
Frederick J. Esposito, Jr., MBA, CLM, is Chief Operating Officer of the regional law firm Rivkin Radler LLP, and has more than 25 years of law and accounting firm experience. He is a frequent speaker and author of articles on a wide-range of topics, including alternative fee arrangements and law firm profitability models. In December 2016, he became a Faculty Advisor for the Nassau County Bar Academy of Law, in June 2013, he was inducted into the National Speakers Association and in 2012 was named Long Island Business News’ CFO of the Year. He is the only Certified Legal Manager on Long Island.

Location / Room: Grapevine A

HR33: Protecting Your Firm: Workplace Investigations

Wednesday, April 17 3:00 PM - 4:15 PM

Workplace harassment is plaguing organizations across the country. How can law firms manage the risk inherent in these complaints and claims and execute effective workplace investigations? Your firm’s response and investigation into an alleged harassment, discrimination or retaliation claim will determine the scope of liability and may even limit the exposure of damages to the firm. Workplace investigators play a critical role in managing this risk, and they often lack the training or support to be successful. This session will provide a practical approach to executing an effective investigation into allegations of harassment, discrimination or retaliation.

Objectives:
- Discover how to discern when a complaint is received and recognize when the issue rises to the level of a "protected complaint."
- Review a 7-step investigative process (Intake and Plan, Interviews, Corroboration, Analysis, Summary, Action and Closeout).
- Identify 10 common mistakes in the investigative process, the potential liability, and strategies to avoid these pitfalls that expose your firm to risk.
- Assess the value of debriefing management after an investigation.
- Develop proactive strategies for the risk management of your employment practices.

Other Information:
- 75 Minutes
- Audience: Advanced
- CLM Application Eligible: No
- CLM App Management Category -FS: Human Resources Management
- CLM Recertification Eligible: Yes
- HRCI: General Credit
- SHRM: Critical Evaluation
- SHRM Learning Format: Instructor-Led Activity
- CLE: Participatory Credit
- CPE Field of Study: Personnel/HR

Speaker Info:
Warren Cook leads SymbianceHR and consults with small to mid-size organizations across industries nationally. He provides strategic advisory services on human resources infrastructure, policy development, risk management of employment practices, workforce communication, employee relations, engagement training and process engineering to maximize the productivity of the workforce. Cook has been providing coaching and human resources services to business leaders, human resources professionals and C-suite executives successfully for 24 years.

Location / Room: Texas 1-3

LI33: Are You Ready for It? The Law Firm Office of the Future

Wednesday, April 17 3:00 PM - 4:15 PM

In this interactive session, the panel will focus on introducing current and future trends in real estate that law firms should be preparing to embrace. With the uptick in the hiring of Millennials, technological advances and the need for employers to embrace the mobile workforce, attendees will get the benefit of finding out what they need to do with this ever-changing workforce. With perspectives from both law firms who have already embraced these new trends, along with the real estate professionals who partner these deals, attendees will learn new insights on these upcoming trends of the future law firm workplace.

Objectives:
• Discover ways to adapt and embrace a mobile workforce.
• Discuss how to minimize overhead cost with a newly structured law office layout.
• Identify tips on working with law firm management to implement this new structure.

Other Information:

• 75 Minutes
• Audience: Intermediate
• CLM Application Eligible: No
• CLM App Management Category -FS: Legal Industry/Business Management
• CLM Recertification Eligible: Yes
• CLE: Participatory Credit
• CPE Field of Study: Business Management & Organization

Speaker Info:

Jessica Mazzeo is a Co-Founder and Chief Operating Officer of Griesing Law, a women-owned and operated law firm in Philadelphia. She provides a critical leadership role in all aspects of the firm, assures that operational excellence is a top priority, and focuses on overseeing and implementing all of the firm’s business operations while establishing policies that promote and retain the firm’s culture and strategic vision. Mazzeo is a frequent author on law.

James L. Cornell, III, leverages 20 years of management and leadership experience in law firms — along with membership in the Association of Legal Administrators (ALA) — to bring together the holistic perspective of today’s legal management professional. He focuses on communication, collaboration, education, leadership, vision and creative solution generation to address the administrative and operational challenges of modern legal organizations. As President-Elect of ALA, his focus has been on opportunities to partner with alliance associations and their members for the purpose of achieving optimal education, skill development and strategic leadership throughout all areas of the business of law. Cornell is a recent transplant from Austin, Texas, to the Mid-Atlantic region as the Office Administrator for Shook, Hardy & Bacon LLP in their Washington, D.C., office.

Tracy Elmblad currently holds the dual role of Chief Information and Operating Officer at Hinshaw & Culbertson, a firm with 20 offices and more than 450 lawyers. Hinshaw recently moved its largest office in Chicago, and it was named one of Crain’s “11 Coolest Offices in Chicago 2018.” Elmblad was formerly the Chief Information Officer of Bingham McCutchen, an AmLaw 50 firm with 1,000 lawyers and 29 offices. She was Co-Founder and Managing Partner of Aztech Consulting Group, LLC for 11 years before going in-house.

Kasey Garcia is a Manager in CBRE’s Workplace practice based in Los Angeles. Her role is to identify the key challenges of a client’s existing workplace environment, and develop a cohesive future occupancy strategy. Garcia specializes in creating a business case for change by demonstrating how data can better inform efficient and effective programming and work flows. Prior to joining CBRE, she was an Associate for Axiom Global. Garcia graduated from Yale University with a BA in East Asian Studies, concentrating in Japanese Art & Architecture. The design skills fostered in the course of her architecture studio practice and the problem-solving mindset developed in her previous role are both key to her work with the Workplace team.

Location / Room: Texas 4-6

CM33: Communicating with Influence and Impact in the High-Stakes Legal Environment

Wednesday, April 17 3:00 PM - 4:30 PM

Let’s face it — no matter what you say or how loud you say it, sometimes you’re just not heard. People ignore you or disrespect you or even steal your ideas. It’s frustrating. It’s tough on your confidence. It can muffle your effectiveness. It can even stifle your career. You’ve earned a place at the table and you deserve to have your voice heard. But how can you do that in the high-stress, high-stakes legal world? It’s absolutely possible. You can learn how to have a more dynamic presence, how to craft every conversation for maximum impact, and how to influence others with ease.

Objectives:

• Outline a foundation to get the results you want.
• Recognize how to attract the right kind of attention and have people listen to you at a whole new level of influence.
• Review the seven steps to tackle the most challenging conversations with grace and impact.
• Identify the four mistakes that will sabotage important conversations.
• Discover the secret no one else will tell you — that will transform every conversation and every relationship you have.

Other Information:

• 90 Minutes
• Audience: Advanced
• CLM Application Eligible: Yes
• CLM App Management Category: Communication Skills
• CLM Recertification Eligible: Yes
• HRCL: General Credit
• SHRM: Communication
• SHRM Learning Format: Instructor-Led Activity
• CLE: Participatory Credit
• CPE Field of Study: Communications

Speaker Info:

Deborah Johnson is a six-time Emmy Award-winning Writer and Producer. Her master's degree in cognitive psychology and television production from the University of Washington, combined with a rich history of experience, gives her unique insights into how to communicate with more influence and impact. She has consulted in a variety of civil and criminal cases, including a $5.3 million civil rights case and numerous multimillion-dollar divorce cases. Johnson is an international speaker and has been published nationally and internationally.

Location / Room: Texas C

Awards Gala

Wednesday, April 17  5:15 PM - 6:45 PM

Sponsored in part by Quill.

Where do you get to relax, enjoy a served, delicious dinner, sip a glass of wine and applaud your constituents as you are inspired by their contributions to your industry? The Association Awards Gala, of course! Join us as we close the conference by celebrating the achievements of several award recipients.

The theme for the evening is Denim & Diamonds, so we invite you to wear casual and formal wear together in a fun way, celebrating the best of both clothing worlds. Dress up your denim with rhinestones and gemstones. Pair a dress or pants with cowboy boots. Jeans and jewelry, sequins and upscale pieces combine to give you comfortable and creative options.

Location / Room: Grapevine Ballroom

VIP Grand Finale

Wednesday, April 17  7:00 PM - 9:30 PM

Wear your best “denim and diamonds!” Boots, jeans, casual or formal dress.

Close out your Annual Conference experience at the VIP Grand Finale. Unwind with your colleagues and give Grapevine, Texas, a proper send-off! ALA’s sponsoring VIP business partners host this high-energy dessert and dancing party.

This fabulous event will take place in the Gaylord’s Glass Cactus Nightclub, a unique venue located on property, a few steps from the hotel itself. Inside, attendees will be treated to a unique “be-your-own” DJ experience and one of the best live bands around, along with scrumptious desserts and beverages. Outside (pending weather), we’ll have some seating areas so you can network and watch the sun set.

Here’s the schedule:

• 7–8 p.m. "Silent Disco": Dance your heart out to your own beat!
• 8–8:15 p.m. Giveaways from our sponsoring VIP business partners
• 8:15–9 p.m. Emerald City Band: Live music you can dance to all night long!

This event is generously sponsored by ALA’s VIP business partners.

Location / Room: Glass Cactus Nightclub

Session Code Key
CM — Communications & Organizational Management
FM — Financial Management
HR — Human Resources Management
LI — Legal Industry/Business Management
OM — Operations Management