

THE LAW FIRM OF THE FUTURE

**WHAT MANAGING PARTNERS NEED TO
KNOW ABOUT IT IN A POST-PANDEMIC WORLD**

February 16, 2022

by

Ivan Hemmans

Senior IT Manager, O'Melveny & Myers
Co-Chair, ABA TechShow 2022

Uri Gutfreund

Law Firm Group Leader, Risk Strategies Company

John Remsen, Jr.

President, TheRemsenGroup

Morris Tabush

Founder and President, Tabush Group

MPF WEBINAR

POWERED BY

TheRemsenGroup
Smart Strategies for the Forward Thinking Law Firm

TheRemsenGroup.com

BIOGRAPHICAL PROFILE

Ivan Hemmans

Senior IT Manager, O'Melveny & Myers

Co-Chair, ABA TechShow 2022

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IVAN HEMMANS

TECHSHOW 2022 CO-CHAIR

Ivan Hemmans is a Senior Manager of Technical Development at O'Melveny & Myers LLP and has extensive experience with information technology. He has worked with law firms for over 20 years and computers for approximately three decades. His programming background, Cognitive Science degree, along with his unique blend of experience and good-natured humor combine to make him engaging and approachable.

February 2022

BIOGRAPHICAL PROFILE

Uri Gutfreund

National Law Firm Practice Leader
Risk Strategies Company
New York, New York
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Uri is the National Law Firm Practice Leader at Risk Strategies Company, a top 25 national insurance brokerage and The Founder and Moderator of The Managing Partner Round Table™, a regional peer-to-peer professional development group. This unique program has quickly become a leading venue for thought leaders in the legal industry.

At Risk Strategies, Uri is responsible for the development and execution of all insurance and risk management services to the company's law firm clients. He oversees all law firm specialty areas including: Health, Professional Liability, Property and Casualty, Cyber and EPLI. His practice leadership combines 20 years personal experience with cutting edge innovation remaking law firm insurance programs using the latest technology, peer benchmarking, and real-time best practices to serve the company's law firm clients.

He has been a Registered Professional Liability Underwriter since 2001 and a frequent speaker and is a writer on law firm leadership, law firm business practices and insurance and risk management at national and regional conferences.

May 2021



Morris Tabush grew up passionate about technology and helping others, and in 2000, he turned this passion into a business, founding Tabush Group. As Founder & President of the firm, Morris oversees its strategy, innovation, and culture. Over the past 20 years, Tabush Group has simplified IT for hundreds of clients. With the 2016 launch of Boxtop, Tabush Group's Desktop as a Service (DaaS) cloud solution, professional firms can securely move their IT to the cloud while eliminating hardware

headaches and unexpected costs. Morris lives in Brooklyn, NY with his wife and 3 young children. Outside of work, he enjoys running, cycling, and volunteering for a few non-for-profit organizations in his community.

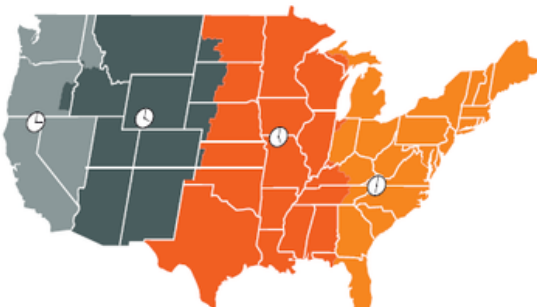
ABOUT TABUSH GROUP

Tabush Group makes your IT life simpler. Since 2000, Tabush Group has been providing IT services to small and midsize firms in the fields of law, real estate, construction, investment management, and professional services. Our mission is to deliver amazing service so our clients can focus on success.

With a proven track record of providing secure, reliable, simple, and well-designed IT services to our clients, we enable them to work smarter, more efficiently, and more productively. Tabush Group is headquartered in New York City.

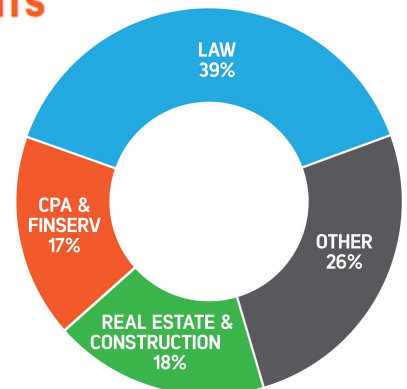
CLIENTS IN EVERY U.S. REGION

and time zone



OUR CLIENTS

We partner with clients from various industries



OUR SECURITY



BIOGRAPHICAL PROFILE

John Remsen, Jr.

President

TheRemsenGroup

Atlanta, Georgia

404.885.9100 – jremsen@therem sengroup.com

John is widely recognized as one of the country's leading authorities on law firm leadership, management, marketing and business development. Since 1997 TheRemsenGroup has consulted with more than 400 law firms and thousands of law firm leaders to help them develop and implement long-term strategic objectives to improve cohesiveness, profitability and sustainability.

John is a frequent speaker and author on law-firm leadership and marketing topics. He has spoken at national and regional conferences of the Legal Marketing Association, Association of Legal Administrators, American Bar Association, and numerous state and local bar associations. His articles have appeared in dozens of highly respected legal publications, including the *ABA Journal*, *Law Practice Management*, *Law Practice Today*, *Law360*, *Legal Management*, *Marketing for Lawyers*, *Marketing the Law Firm*, *Managing Partner*, *National Law Review* and *New York Law Journal*.

Since 1988, John has been an active member of the Legal Marketing Association, and he has served as President of LMA's Southeastern Chapter, Executive Editor of *Strategies* (LMA's newsletter) and a member of LMA's national Board of Directors. He is also an active member of the Association of Legal Administrators and a popular speaker at ALA meetings and conferences.

In 2002, John created The Managing Partner Forum, a highly acclaimed conference series and community for managing partners and law firm leaders. More than 1,200 firm leaders from 900 law firms and 43 states have participated in 26 conferences. In addition, John distributes *The MPF Weekly*, an electronic newsletter to more than 10,500 firm leaders throughout the U.S., Canada and 28 other countries.

John's influence was underscored when he was inducted as a Fellow of the College of Law Practice Management in 2013, in recognition of his 25 years of demonstrated expertise in law firm leadership and management. Founded in 1994, the College honors those who "inspire excellence and innovation in law practice management." Membership is by invitation only and includes just 200 individuals.

And the College was not alone: in 2016, John was recognized by LawDragon as one of the "Top 100 Consultants and Strategists" to the legal profession; and in 2017, John was recognized as one of the world's top "leaders and influencers" in the business of law by the Association of International Law Firm Networks.

A native of West Palm Beach, Florida, John holds an MBA from The University of Virginia (1985) and a bachelor's degree in Business Administration from the University of Florida (1980). Prior to enrolling in graduate school, John was Executive Director of The Florida Council of 100, an organization comprised of Florida's top CEOs and other business leaders.

May 2021

MPF Webinar Series: The Law Firm of the Future



The MPF Webinar Series: Building the Law Firm of the Future

**What Managing Partners Need to Know About IT in a Post-Pandemic World
and a Sneak Preview of ABA's TechShow 2022**

An MPF Webinar with Ivan Hemmans and Morris Tabush

February 16, 2022 – 2:00-3:00pm ET



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Welcome



Uri Gutfreund

National Law Firm Practice Leader, Risk Strategies Company
Founder, MP Roundtable



John Remsen, Jr.

President and CEO, Managing Partner Forum
President, TheRemsenGroup



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MPF Webinar Series: The Law Firm of the Future



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ADVANCING THE BUSINESS OF LAW



Guest Speakers



Ivan Hemmans
Senior Manager-Technology, O'Melveny & Myers LLP
Co-Chair, ABA TechShow 2022



Morris Tabush
President and Founder, Tabush Group



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RISK
STRATEGIES

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ADVANCING THE BUSINESS OF LAW



MPF PROGRAMS IN 2022

- MPF Webinar Series – Third Wednesday @ 2pm ET
- The Virtual MPF Conferences – June 23 and December 8
- The MPF 2022 Leadership Conference – May 4-5 *
- The MPF 2022 Fall Symposium – October 6 *
- *The MPF Weekly* – Friday mornings
- MPF Website – www.ManagingPartnerForum.org
- MPF Listserv and Conference Calls



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MPF Webinar Series: The Law Firm of the Future



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ADVANCING THE BUSINESS OF LAW



TODAY'S WEBINAR

- Registrant Survey Results – 75 law firm leaders
- Today's Topic – **What Managing Partners Need to Know About IT in a Post-Pandemic World and a Sneak Preview of ABA's TechShow 2022**
- Audience Polling Questions, Question Box
- Next MPF Webinar – March 16, 2022



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AUDIENCE POLLING QUESTION #1

How many lawyers are with your firm?

9.09%	Less than 10 lawyers
18.18%	10-25 lawyers
27.27%	26-50 lawyers
27.27%	51-100 lawyers
18.18%	More than 100 lawyers



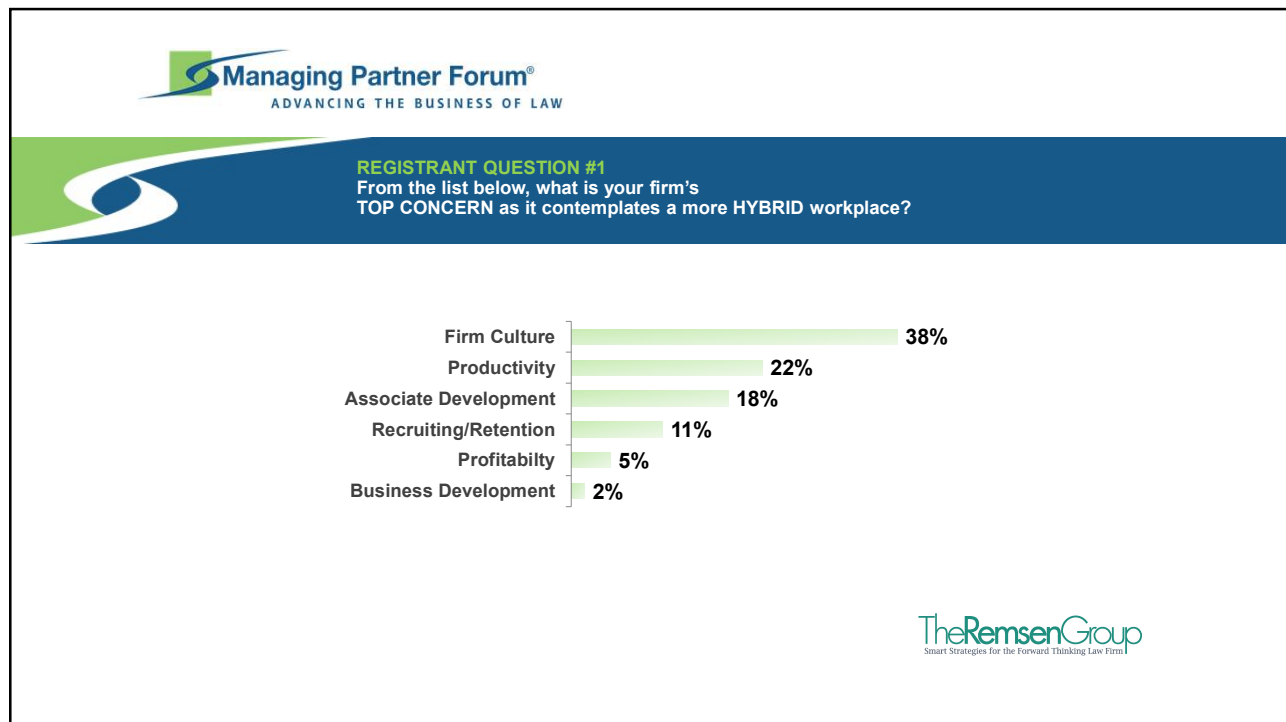
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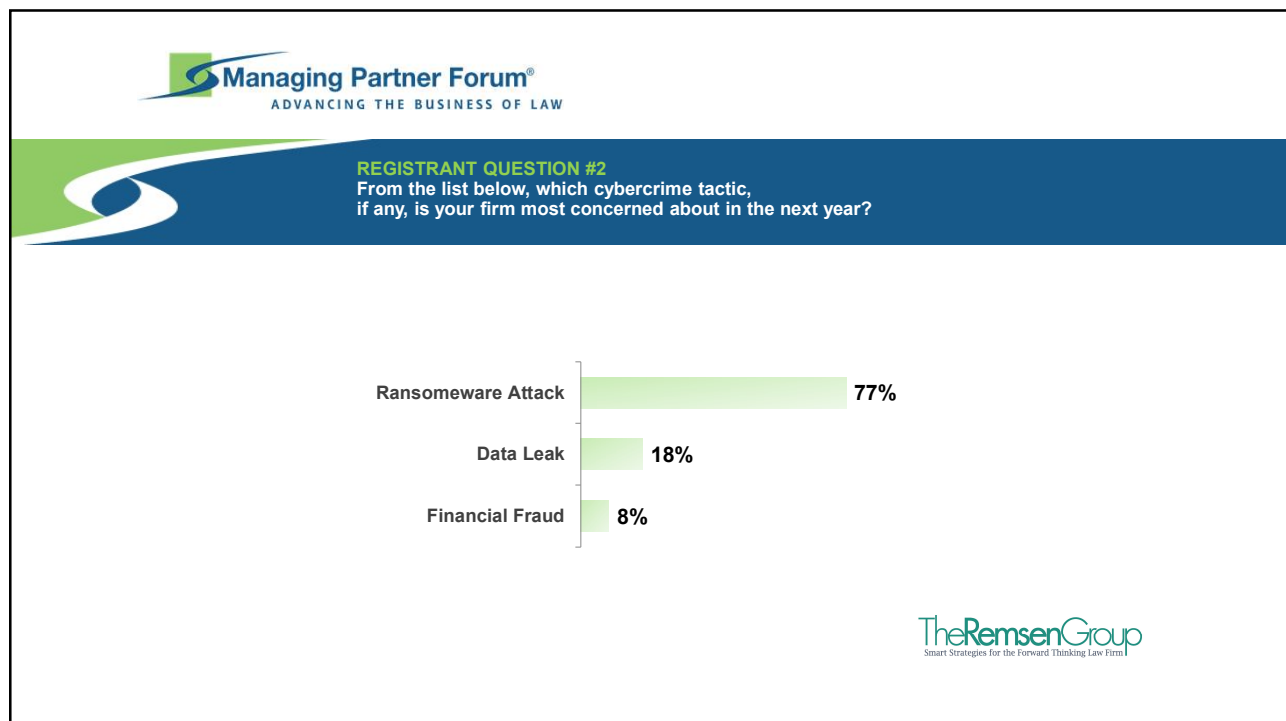
RISK
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MPF Webinar Series: The Law Firm of the Future

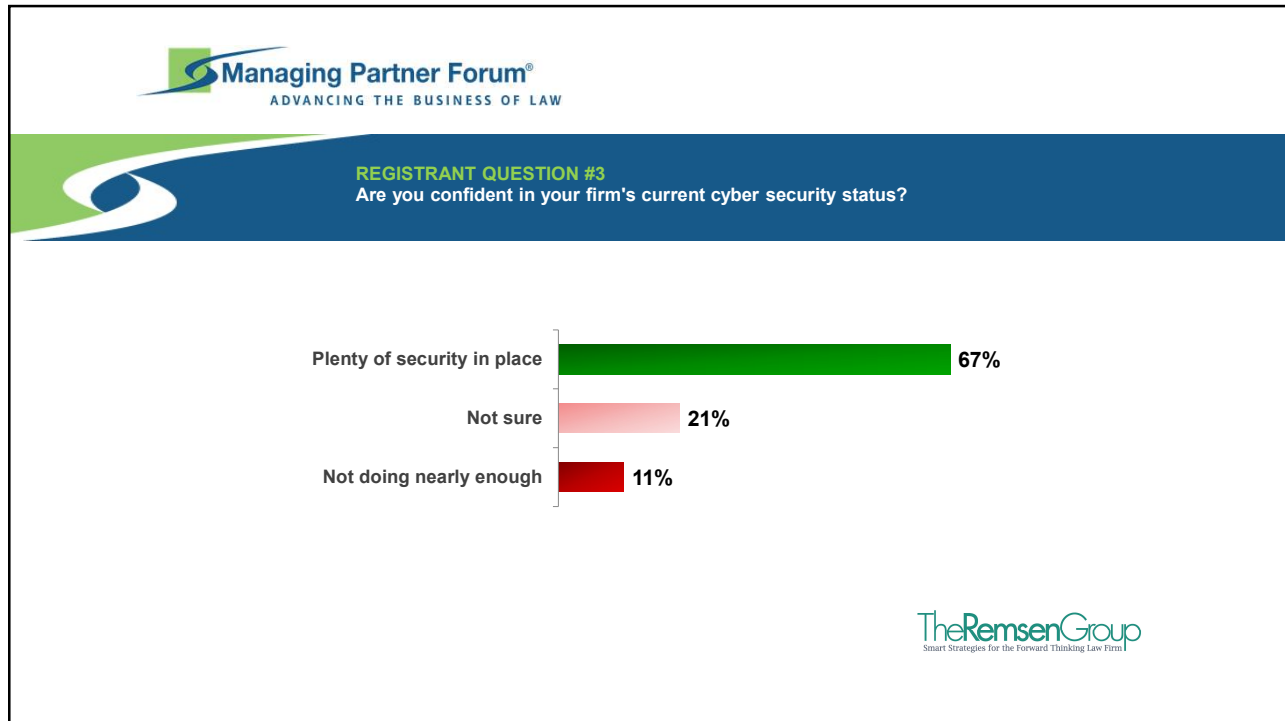


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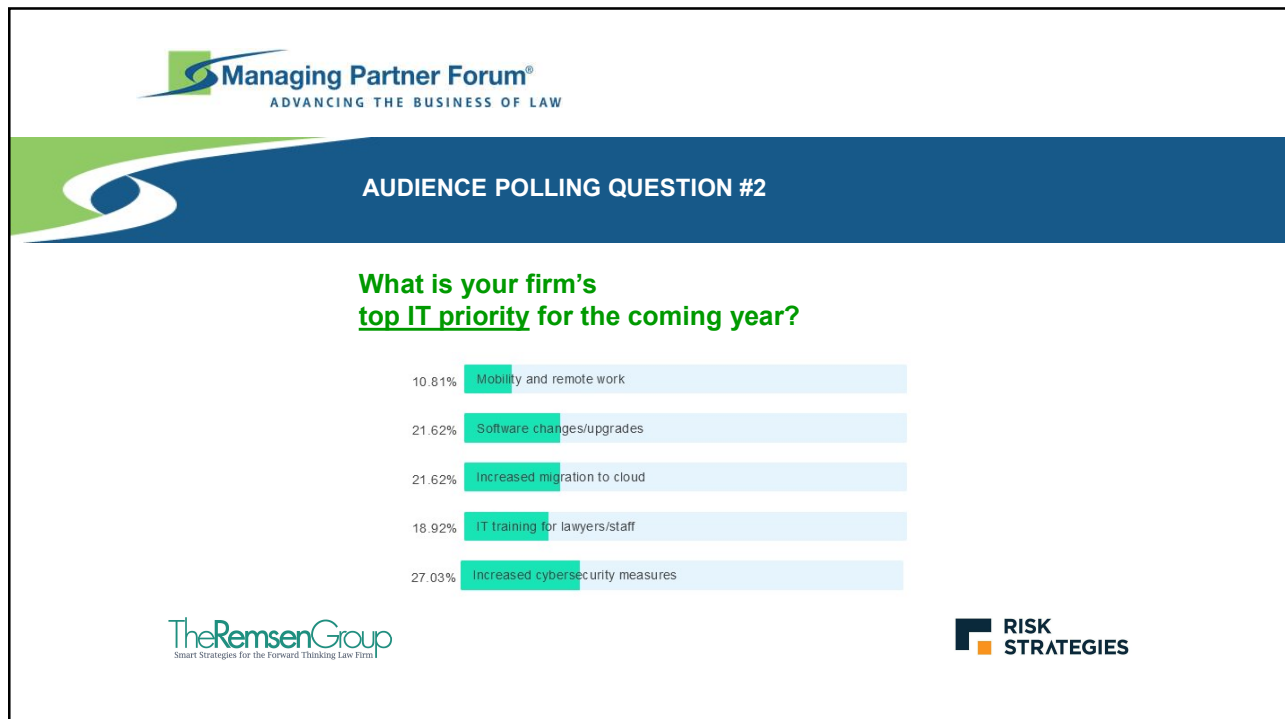


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ABA TECHSHOW 2022 Planning Board



Ivan Hemmans
Co-Chair



Brooke Moore
Co-Chair



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Gyl Tsakalakis
Co-Vice Chair



Kimberly Y.
Bennett



Kenton Brice



Erin H.
Gerstenzang



Lori Gonzalez



Darla Jackson



Annette Sanders

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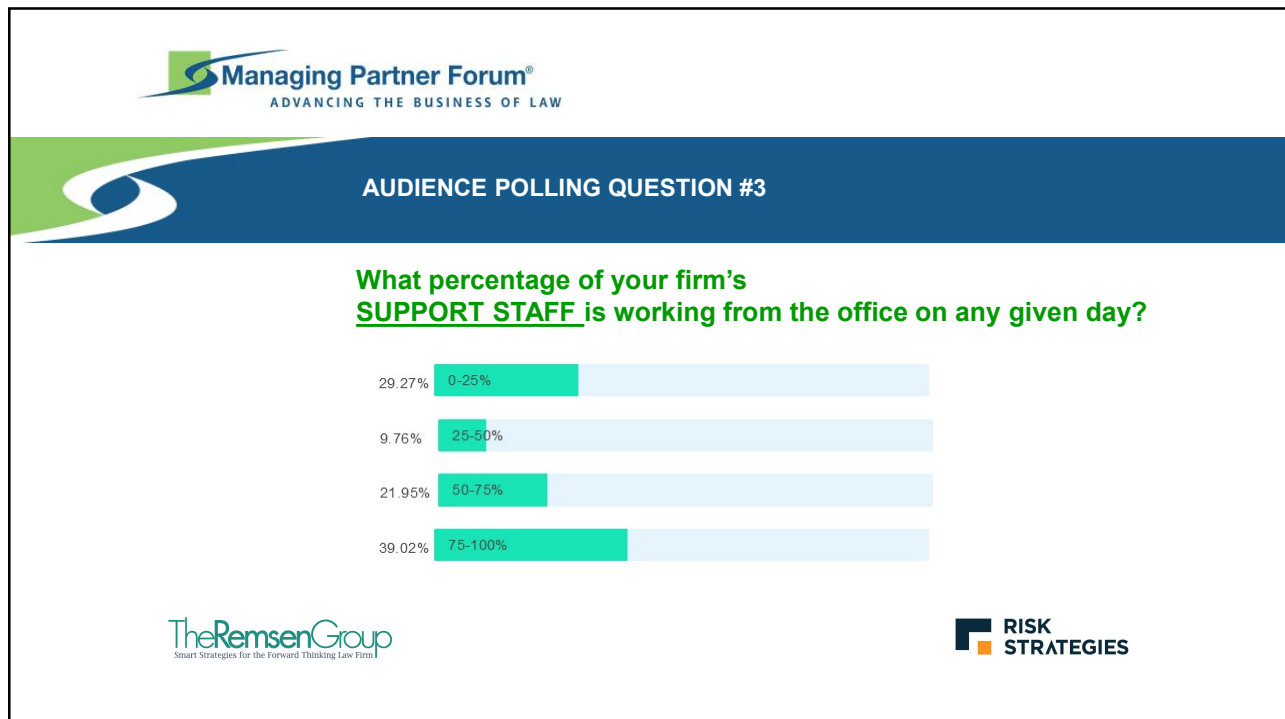
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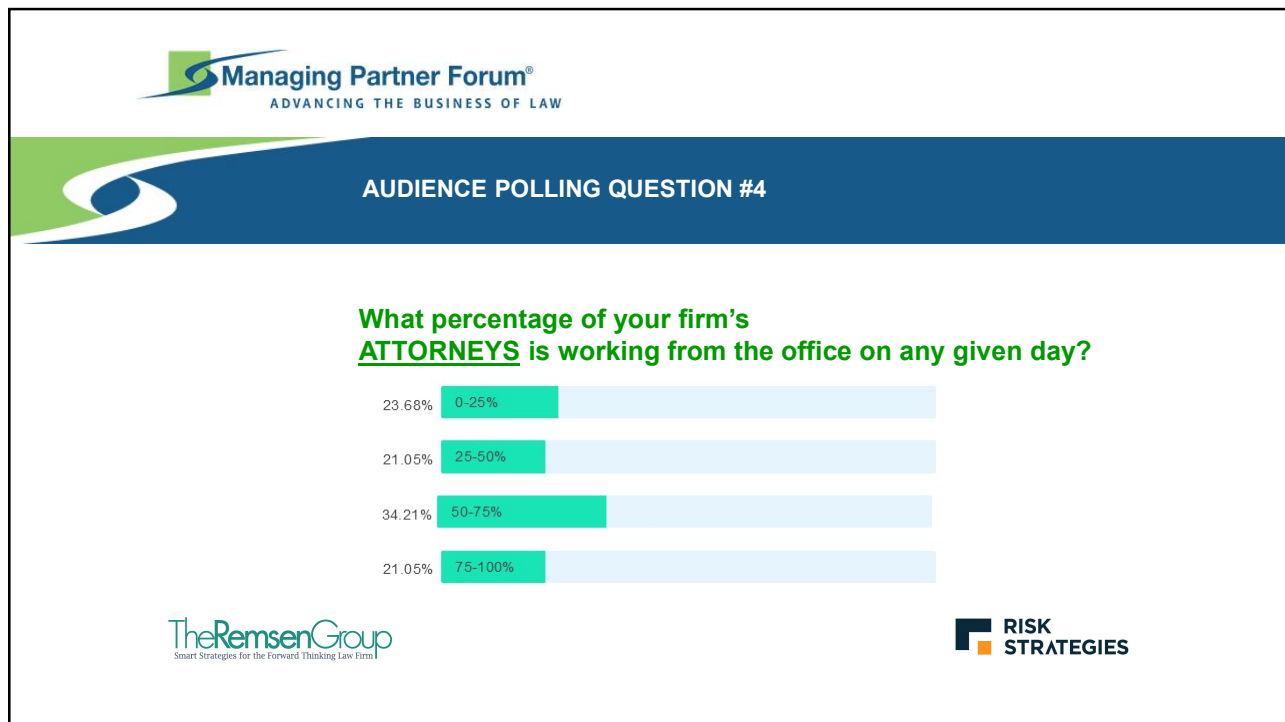


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**Managing Partner Forum®**
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**RECOMMENDED RESOURCES**

- ABA Law Practice Division
- Your state and local bar association
- International Legal Technology Association (ITLA)
- Association of Legal Administrators (ALA)
- Commercial Legal Operations Consortium (CLOC)
- Law firm networks

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**RISK STRATEGIES**

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MPF Webinar Series: The Law Firm of the Future



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The MPF Webinar Series: Building the Law Firm of the Future

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**RISK
STRATEGIES**



TECHSHOW2022

March 2-5, 2022

www.techshow.com

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Presented by:



AMERICANBARASSOCIATION

Law Practice Division

Program

Thursday
03.03.22

DESIGN

8:45am - 9:45am

SERVE NEW CLIENTS BY INCREASING CULTURAL COMPETENCY

Iffy Ibekwe

Lawyers can serve more clients when they design for cross-cultural competency. You don't have to speak a second language to draw clients across from varying communities, however, if you want to reach more clients, you do have to design a client experience that speaks to more than one group. In this session we will share tools and strategies that help your firm make people feel valued, build loyalty, and repeat business.

10:45am - 11:45am

LOCATION, LOCATION, NO-CATION: LAW FIRM REAL ESTATE POST-PANDEMIC

Joshua Lenon, Jeana L. Goosmann

The idea of a virtual law firm has never been more popular. Following a year of working from home, many law firms are asking if they even need to keep their office space. Real estate costs are generally the second-biggest expense for most law firms. Before lawyers rush to break their leases, they should learn about shifting client expectations, emerging return-to-workplace research, and what their competitors are doing when it comes to real estate and what opportunities exist. In what ways does location still matter to law firm real estate? Find out in this session.

2:00pm - 3:00pm

THE CYBER-SECURITY PLAN

Non-CLE

The threat of cyber-attacks looms large over all law firms these days — whether you know about it or not. Despite omnipresent risks, lawyers rarely think about the details needed for a comprehensive cybersecurity plan — until an attack happens. In this session, we highlight the key components needed in an effective and scale-able cyber plan to help your firm identify where you are most vulnerable.

4:00pm - 5:00pm

RECRUITING + TEAM GROWTH STRATEGIES

Non-CLE

Julia Taylor

The struggle is real for law firms looking to hire new team members. The world of remote work has created a universe of new possibilities — which sounds great, but can also make the task of team building all the more daunting. In this session we will show you how to design a plan for your firm that will give you the confidence to recruit and build a team that is customized for your business.

LAUNCH

8:45am - 9:45am

ETHICALLY MANAGING MODERN EMERGENCIES: ARE YOU READY?

Anne-Marie Rábago

Before March 2020, we might have thought of emergency preparedness as having a succession plan. Now, we must prepare for abrupt changes to the workplace including dramatically altering how and where our firm operates in as fast as one day. In this session, attendees will learn how to create a strong emergency preparedness plan, how to adapt to using new technology rapidly during an emergency, and the necessity and ethical obligation of having an appropriate Incident Response Plan.

10:45am - 11:45am

PLANNING FOR A SUCCESSFUL CAREER: TECH TO IMPROVE YOUR THINKING AND CREATIVITY

Jenn Deal, April Dawson

Ask any successful business owner for a secret to their success and they'll all tell you a variation of this: "I made time to think and plan and then I organized my days and acts to further that plan." You can't grow your business and/or career without setting aside time to think, creating short-term and long-term plans, and then structuring your days towards fulfilling those plans.

2:00pm - 3:00pm

LAUNCHING A DIGITAL SHINGLE: HOW INCUBATORS CAN HELP

Rukayatu Tijani, Jessica Bednarz

In search of help as you launch your shingle? Considering or recently launched a digital shingle? Learn how

incubators have helped lawyers across the U.S. and world launch new firms and now, digital firms.

4:00pm - 5:00pm

MICROSOFT 365 VS GOOGLE WORKSPACE: MANAGING CASES AND CLIENTS

Non-CLE

Carol-Lynn Grow, Eric Patrick

Put Microsoft 365 and Google Workspaces to the test. Assess their case and client management functionality, security proficiency and controls. Learn which company's products are tailored to fit your needs and plans the best.

GROW

8:45am - 9:45am

KNOW YOUR CUSTOMER: SCALING AND PROTECTING YOUR FIRM IN A GLOBAL ECONOMY

Joshua Lenon, Ticora E. Davis

Grow your firm with a global client base. The market is global and law firms must embrace the regulations that come with a global economy. Learn your legal and ethical obligations for working with global clients including leveraging technology to create Anti-Money Laundering (AML) and Know Your Customer (KYC) workflows to build a firm that responds to today's client, keeps your business compliant, and ensure cultural competent representation. Learn the tools and resources you can implement in the next 90 days to create and execute a AML and KYC culturally competent growth plan for your practice.

10:45am - 11:45am

BUILDING OUT YOUR OPERATIONS

Ruby Powers, Delania Barbee, Esq.

Technology is a vital piece of your growth and ultimate sustainability. At this stage in your journey, it's essential to understand the workflows and process to conduct ongoing audits of your firm operations, including management of tech vendors. Learn the tools and resources you can implement in the next 90 days to create and execute a technology growth plan for your practice.

2:00pm - 3:00pm

USING YOUR FINANCES TO INFORM KEY BUSINESS DECISIONS

Eric Patrick, Allison C. Williams, Esq.

Your path to sustainable operations requires gathering and interpreting financial data. As you grow your business, understanding of the key finances you should be tracking and how leverage technology to interpret that data is vital. Learn the tools and resources you can implement in the next 90 days to create

and execute a financial tracking growth plan for your practice.

4:00pm - 5:00pm

ADVANCED CUSTOMER RELATIONSHIP MANAGEMENT Non-CLE

Maddy Martin, Conrad Saam

Customer Relationship Management (CRM) is not email marketing. You've grown your business through solid marketing, and now it's time to develop an advanced customer relationship management strategy that will attract more potential clients, generate referrals from current and past clients, while also keeping the clients you have and strengthening those relationships. In this session, you will learn the key data points to measure as you develop a robust CRM strategy. Learn the tools and resources you can implement in the next 90 days to create and execute a customer relationship management growth plan for your practice.

SUSTAIN

8:45am - 9:45am

MAKING YOURSELF REPLACEABLE AND GET BACK TO LEADING

Jon Tobin, Rukayatu Tijani

Since the pandemic firm leaders have had to step into the day-to-day. Now it's time to return to leadership. In this session we will discuss ways for you to take yourself out of the day-to-day. Start by evaluating your firm's tech, security systems, and training practices. As new processes are created and new technology is implemented, leaders will have to create a safe culture for team members to adapt to the new changes and have room for error. Getting back to leadership will give you the space you need to be strategic, creative and mindful of your own well-being.

10:45am - 11:45am

UTILIZING TECH TO REPLACE OR IMPROVE ADMIN WORK

Ivy B. Grey, Jon Tobin

Admin work is the biggest labor burden for lawyers and firms and present many challenges for improving efficiency. Traditionally the solution for many firms struggling with admin work is to hire admin staff. This session will help you rethink this traditional approach and turn to technology first. Tech solutions can solve administrative headaches, improve processes, ensure proper security measures are in place, and return hours of time back to you and your administrative staff. The process starts with a thorough analysis of current technology; followed by proper research and adoptions and implementation that are vital and improve overall office efficiencies.

2:00pm - 3:00pm

MANAGING CHANGE THROUGH UNCERTAINTY

Dorna Moini, M. Zane Johnson, Esq.

As we continue to see the law firm model break it's traditional mold we now have the opportunity to set a new gold standard of people first. In this session you will learn how to use tech to create a culture of transparency for a hybrid workforce. These tech tools will increase communication, productivity, and collaboration. We will also take a look at firm related policies that will help you meet the challenges of today's labor pool so you can create a supportive culture and safe place for people to maintain a proper work/life balance that is healthy, inclusive, and productive.

4:00pm - 5:00pm

BUILDING BRIDGES TO A COMPLETE LEGAL ECOSYSTEM: GETTING LAWYERS OFF AN ISLAND

Jack Newton, Erin H. Gerstenzang

Continued isolation and increased law firm management responsibilities have put lawyers on an island in an industry that would thrive as an ecosystem. With a focus on building ways to connect lawyers to each other, technology, client needs, and the greater legal community our profession can together meet the overwhelming demands. In this session, we will share tech tools, resources, and strategic partnerships to help you build a supportive legal system. By connecting lawyers to all those who participate in the industry, the profession will build a stronger and more collaborative legal ecosystem to serve a greater population with an eye towards sustainability and well-being.

TRANSFORM

8:45am - 9:45am

COME PLAY IN THE SANDBOX: HOW TO ADVANCE LEGAL SERVICES THROUGH REGULATION

Ed Walters, Lori Gonzalez

There are various definitions for sandboxes but basically a "sandbox is a testing environment that isolates untested ... changes and outright experimentation from the production and operations environment." The use of sandboxes to allow experimentation in industries involving advanced technologies has been an expanding trend. In this session, you will learn about developments in the use of sandboxes for legal data analysis and regulation and discuss how the use of sandboxes has been undertaken in some jurisdictions to expand those individuals involved with the delivery of legal services. The goal of this experimentation is to transform

the legal community in ways meant to address access to justice concerns.

10:45am - 11:45am

RE-ENVISIONING ATTORNEY ROLES IN AN AI-EMPOWERED WORLD

Kenton Brice, Jacqueline Schafer

Will attorneys be replaced by intelligent machines? This session will debunk the myth that lawyers will be replaced by AI and discuss attorney control over adoption of AI tools. Additionally, this session will offer thoughts on transforming attorney roles when AI tools are sufficiently advanced to allow automation of more routine tasks in order to permit legal service providers the freedom to focus on the performance of higher value undertakings in a more satisfying and balanced work environment.

2:00pm - 3:00pm

ONLINE DISPUTE RESOLUTION: TRANSFORMING OUR DEFINITION OF JUSTICE

Jeffrey Aresty, Jim Calloway

Meeting individuals where they are and allowing them input in the development of rules and process in the resolution of disputes can increase satisfaction regardless of the ultimate outcome. This bottom-up approach can improve participants' satisfaction regardless of whether the dispute process occurs in a traditional forum or online, utilizing technological support. This session aims to help legal professionals understand how online dispute resolution can transform the way the public perceives the justice system and its role in expanding access to justice.

4:00pm - 5:00pm

TOP INSIGHTS FROM ANALYZING AI TOOLS IN LEGAL WRITING INSTRUCTION

Michael Zuckerman, Jacqueline Schafer

Is law school encouragement of smart technology and tools producing lawyers who are less able to critically analyze, write and practice? Some argue that the answer to this question is yes in the context of initial legal writing instruction. Others would say no while focusing on the demand for practice-ready law school grads. How is the answer affected by equity and inclusion considerations regarding the differing skill level development of entering law students. This session will focus on the pros and cons of the use of AI tools in legal writing instruction to produce future looking attorneys.

Friday
03.04.22

DESIGN

8:30am - 9:30am

BOOST PRODUCTIVITY BY DESIGNING FOR WELLNESS IN YOUR FIRM AND/OR LEGAL CAREER

Stanley Tate, Jenn Deal

Wellness is all the rage these days (and it should be), but what does it really mean to lawyers, and how can it drive productivity and profitability? In this session we will show you how to harness the power of wellness to boost productivity and sustainability.

10:30am - 11:30am

WHAT LEGAL CAN LEARN FROM OTHER INDUSTRIES?

Jack Newton, Kimberly Y. Bennett

Many lawyers don't like to think of themselves as business owners, but a law firm is a business, and running one means being aware of business concerns like product-market fit, efficiency, and above all, the customer experience. Join this session to learn the lessons legal can take from other industries, and discover how to innovate to meet client expectations and strengthen your business as a result.

3:00pm - 4:00pm

FEE SETTING STRATEGIES-HOW TO USE CUSTOMER-FOCUSED PRICING TO INCREASE CLIENT SATISFACTION & LAWYER WELL-BEING

M. Zane Johnson, Esq., Jessica Bednarz

Modern day clients desire (and expect) more flexible fee structures. Plus, value-based pricing can eliminate billing headaches and increase attorney wellbeing. Leverage your pricing model to be an asset for your business and learn strategies and tactics to incorporate client-centric pricing into your legal business today.

4:15pm - 5:15pm

SIDE-HUSTLE LAW FIRM - HOW TO BRIDGE THE GAP WHEN YOU ARE STARTING YOUR OWN PRACTICE

Erin H. Gerstenzang, Stanley Tate

Whether you are leaving a current job or you are just starting out, hanging the proverbial shingle means you have a lot of new territory to navigate. Today's inexpensive yet highly effective technology tools enable lawyers to build firms they love to run, where they can

exceed client expectations and design their professional lives on their own terms. In this session we will bring clarity to the overwhelm of building a new firm and share examples of how lawyers are using innovation and technology to build better businesses from day one.

LAUNCH

8:30am - 9:30am

RIGHT FIT: CREATING OR IMPROVING THE RIGHT FIT BILLING PROCESS FOR YOUR FIRM

Julia Taylor, Regina Edwards

Attendees will learn to become more efficient with billing and fee collecting by learning which functionality is best for their firm and developing the right billing process for their practice. Develop and improve process creation and development with expert guidance in this session.

10:30am - 11:30am

EXECUTING YOUR MARKETING PLAN: ARE YOU SURE YOU KNOW WHAT YOU'RE DOING?

Non-CLE

Jeana L. Goosmann, Conrad Saam

You may think you know what you're doing with marketing, but does your content marketing plan (if you have one) truly fit what you need? Are you targeting the right market with the right process? How can you scale up your marketing plan? Attendees in this session will explore best practices and worst nightmares as they seek to find the best marketing plan for their firm.

3:00pm - 4:00pm

STARTING WITH THE BEST: BUILDING THE RIGHT INTAKE PROCESS

Maddy Martin, Regina Edwards

In this workshop, attendees will get hands-on experience systemizing and perfecting their own intake process. Bring your questions and concerns about automating the intake process, selling a consultation, and following up with potential clients.

4:15pm - 5:15pm

REMOTE WORK: ETHICALLY DO MORE WITH LESS TIME

Delania Barbee, Esq., Daniel J. Siegel

Remote work took many by surprise, but it can be a great new way to run all or part of your business. Learn "how to do more in less time" by quickly adapting and getting the most out of new technology, understanding the new cybersecurity risks with remote work and what it takes to remain ethically compliant in your practice, and better configuring your own and/or your staff's workspace to maximize efficiency.

GROW

8:30am - 9:30am

INTERPRETING DATA TO DRIVE DECISION-MAKING

Ticora E. Davis, Allen Rodriguez

Your knowledge is valuable and how you store and reference it is an untapped opportunity to grow your practice and delight your clients. Learn the tools and resources you can implement in the next 90 days to create and execute a knowledge growth plan for your practice.

10:30am - 11:30am

INFUSING CULTURAL COMPETENCE INTO YOUR BUSINESS OPERATIONS

Nkoyo-Ene Effiong, Diego Alcala Laboy

Equity in the Law is not designated only for Civil Rights Attorneys. In fact, you have the opportunity to elevate equity in your practice today — with yourself, your team, and your clients — whether you're a litigator or have a transactional practice. At the end of the session, you will have the tools and resources you can implement in the next 90 days to create and execute a equity-centered growth plan for your practice.

3:00pm - 4:00pm

STRATEGIES TO GROW YOUR TEAM WITH EASE Non-CLE

Stacey M. Lake

Solo life was great — but, now it's time to grow. You are ready to transition from solo to CEO and need the strategies to remove yourself from daily operations. At the end of this session, you will have tools and resources you can implement in the next 90 days to create and execute a team growth plan for your practice.

4:15pm - 5:15pm

USING YOUR BUSINESS TO FUND YOUR IMPACT

Anne-Marie Rábago, Diego Alcala Laboy

You're ready to embrace a better legal business model that provides for wellbeing and activism. Learn how to leverage technology to allow you to show up for yourself, your team, your clients, and your community. At the end of the session, you will be introduced to tools and resources you can implement in the next 90 days to activate your impact without sacrificing your wellbeing.

SUSTAIN

8:30am - 9:30am

LEGAL SUPPORT SERVICES: MANAGING A REMOTE OR HYBRID WORKFORCE

Dorna Moini, Stacey M. Lake

Managing a successful hybrid workforce can be challenging with today's labor pool. These challenges can be met with proper legal support solutions that focus on improving communication, collaboration, and knowledge sharing. In this session we will look at tech tools and outsourced solutions to help you improve workplace policies, upgrade/replace tech tools, and increase productivity. Learn how to find the right help you need for you and your firm.

10:30am - 11:30am

THE UNTAPPED OPPORTUNITY: RETHINKING ACCESS TO JUSTICE TO GROW YOUR BUSINESS

April Dawson, Allen Rodriguez

Our profession has traditionally served low-income clients with pro bono services or through the creation of non-profit organizations. This session will challenge your thinking and flip the script, enabling you to see new ways to serve this core group of clients. We will look at scalable solutions and services to meet their needs and help your firm grow.

3:00pm - 4:00pm

LEGAL OPERATIONS: REBUILDING AN EFFECTIVE FOUNDATION

Nefra MacDonald, Allison C. Williams, Esq.

The focus of law office management is not merely staying in business but growing your business. This session is designed to help legal professionals examine opportunities for business growth through law office management efficiencies. We'll share key metrics to understand where your business is, what you should focus on to optimize operations, and how to create a strategic plan that helps you use these metrics as growth levers for your firm.

4:15pm - 5:15pm

HOW TO IMPROVE DOCUMENT CREATION WORKFLOWS - AND WHY IT MATTERS

Ivy B. Grey, Kenton Brice

Today 39 states require that all lawyers maintain an awareness of the benefits and risks of technology in their law practices. One area where lawyers use technology the most—but rarely consider the risks or opportunities—is document creation.

In this session, we'll discuss the duty

of technology competence and bring it into the real world with a focus on Microsoft Word in legal practice. We'll take a deep dive into document-creation work and explore options for working more effectively and efficiently. To guide our discussion, we'll draw from the ongoing work of a collaboration of legal professionals called the Effectiveness Project, which seeks to provide lawyers a clear framework for document creation.

TRANSFORM

8:30am - 9:30am

BUILDING YOUR DREAM LAW FIRM: UNLOCKING THE POSSIBILITY OF ALTERNATIVE LEGAL SERVICES

Nefra MacDonald, Nkoyo-Ene Effiong

The practice of law is evolving and transforming—and law firms and legal practitioners are finding innovative ways to keep up. According to the 2020 Legal Trends Report, over a quarter of law firms now offer unbundled legal services, and eight percent offer subscription-based legal services, creating a shift in revenue and labor structures.

Driven by technology innovations, shifting client expectations, and changes to law firm ownership rules in multiple states, it's becoming increasingly advantageous for firms to embrace alternative legal business models. This session aims at helping firm leadership develop a business model that can meet client needs while also producing a successful and healthy firm culture.

10:30am - 11:30am

CREATING A CERTIFICATION FOR TRUSTWORTHY AI? IF, WHEN & THE FUTURE FOR LEGAL PROFESSIONALS & CLIENTS

Ed Walters, Darla Jackson

The lack of substantial government regulation of artificial intelligence creates an environment entailing risks for attorneys and clients utilizing AI tools. Despite technological competence requirements to keep abreast of changes in the law and its practice, including the risks and benefits associated with technology, many attorneys would find it difficult to identify the risks associated with their own use of AI let alone the risk associated with the use of AI by clients. Come learn about certification initiatives for responsible AI governance. We will explore and discuss the status of AI regulation and whether reliance on certification programs will satisfy attorney ethical standards regarding technology competence.

3:00pm - 4:00pm

REALIZING TECHNOLOGY'S POTENTIAL TO IMPROVE ACCESS TO JUSTICE

Jeffrey Aresty, Darla Jackson

Is the digital divide the primary barrier to realizing technology's potential to improve access to justice? According to the Justice Needs and Satisfaction in the United States Report prepared by the Institute for the Advancement of the American Legal System (IAALS) a very small percentage of respondents who reported not seeking legal information or advice on the internet cited a lack of access to the internet or a lack of comfort using technology as the reason. If the digital divide is not the primary barrier, what are the obstacles to realizing technology's potential to improve access to justice. Come and join in a discussion.

4:15pm - 5:15pm

FUTURE PRACTICE OF LAW, 2022 AND BEYOND

Ruby Powers

The ever-evolving landscape of law practice, including reaction to COVID-19, labor shortages, consumer demands, non-lawyer ownership of firms, and technology shifts has changed the way we practice law and do business indefinitely. These multiple paradigm shifts can't be undone. In this session, we'll identify key disrupting factors and consider how to stay ahead of the game to be prepared for the future practice of law.

VIRTUAL

CORE CONCEPTS

EDISCOVERY: MAGIC SIMPLIFIED- COLLECTING & ANALYZING EVIDENCE FROM MOBILE DEVICES Non-CLE

Marc D. Morse, Kendall B. Williams

Learn the ins-and-outs of collecting, analyzing and recovering evidence from mobile devices. Discover how digital forensic capabilities have grown by reviewing real-world situations. What seems hidden may be revealed after all. Game on!

MS TEAMS: MASTERING THE FUNDAMENTALS Non-CLE

Karuana Gatimu

If you have Microsoft Teams and are also paying for Zoom, then this session is for you. Not only will you master the fundamentals of Teams, but you'll also become familiar with some of the compelling features it enables for lawyers and internal law firm collaboration. You'll discover

that Teams can do practically everything Zoom can, as well as several things that Zoom cannot.

HOW TO COMPLY WITH DUTY OF TECHNOLOGY COMPETENCE: A PRACTICAL GUIDE Non-CLE

Ivy B. Grey

Lawyers have an ethical obligation to competently represent their clients. Competence includes the substance of the legal work and the technology used to provide legal services to clients. This program will address (a) the duty of technology competence as it relates to technology used in practice (Model Rule 1.1); (b) the implications of the forward-looking nature of Model Rule 1.1; and (c) how refusal to embrace technology can become an ethical issue, and lead to overbilling clients (Model Rule 1.5). This session will also explore how Model Rules 1.6, 5.1, and 5.3 interact with Model Rule 1.1. Examples and discussion will focus on MS Word in legal practice.

WHAT LAWYERS NEED TO KNOW ABOUT USING A MAC IN THEIR LAW PRACTICE Non-CLE

Brett Burney

You're a lawyer and you just bought yourself one of those new M1 Macs that you've been hearing about for a while. Now that you have it, you'd like to put it to work in your practice. So, what do you do? Do Apple computers have a place when it comes to practicing law? What applications do you need? And are there any other considerations?

BUILD A VIRTUAL LAW FIRM

Laura O'Bryan

As more and more legal professionals do their work from home and on the road, the high overhead and inflexibility of traditional office models becomes less and less appealing. In addition, a growing number of clients are looking for flexibility in the way they interact with their lawyers.

Enter the virtual law firm: an alternative practice model that introduces new possibilities for law firms and their clients.

PDF SKILLS: I DIDN'T KNOW I COULD DO THAT!

Daniel J. Siegel

Many lawyers only use PDF software to create and read PDFs and do not realize that it has countless other features that, if used, will save them time and improve their productivity. This program will demonstrate some of the many lesser known features in PDF software and how attorneys can utilize them to better their practice.

THE DIGITAL CLIENT FILE

Jim Calloway

A traditional paper-based client file carries a lot of risk. What would you advise a business client who told you they only keep one copy — on paper — of many critical business documents? Transforming physical client files into their digital equivalents means critical client data can be backed up to guard against loss. These digital files are also more valuable to the practitioner, allowing access to any document in a few clicks — as opposed to flipping through paper — and more. Digital records facilitate information sharing via secure client portals, application of data analytics tools, mobile access to records and less expensive archiving. All law firms now keep some records in digital formats, but today's digital client file should provide access to all the records. This session will cover best practices to convert a client file spread across several locations into what it should be — a digital client file, which enables quick access to all information related to the client matter, including billing information and other items that were not contained in a traditional client file.

STOPPING THE TROJAN HORSE: SECURING AND PRESERVING YOUR BUSINESS Non-CLE

Daniel Garrie

No one is immune to a cybersecurity incident. Every industry and business sector—including the legal profession—is a target for hackers and cybercriminals. As early as 2009, the FBI flagged the legal industry as a group that was vulnerable to cyber attacks, issuing an advisory that hackers were increasingly targeting law firms.

This discussion explores why law firms need to be proactive and dynamic in their cybersecurity practice; how they can mitigate their vulnerabilities and protect themselves and their clients.

MS WINDOWS 11 FOR LAW FIRMS - (WHAT'S) NEWS AT 11 Non-CLE

Ben M. Schorr, Annette Sanders

MS Windows 11 brings smart new looks, updated default apps, extra capabilities, useful new tools, and performance improvements. Gain insight into the ins and outs of the latest that this time-honored operating system brings to bear and how your firm can benefit from it.

NEXT LEVEL ON CAMERA TRAINING FOR LAWYERS Non-CLE

Elisabeth Steele Hutchison

Employ strategies from cinematographers, news broadcasters, and YouTubers to communicate effectively on video calls and in remote proceedings.

VIRTUALLY EVERYTHING

EVALUATING TECHNOLOGY FOR YOUR PRACTICE Non-CLE

Debbie Foster, Tanika Finney

Overwhelmed by all the technology options available to lawyers? Attend this session and learn about how evaluate technology solutions. Speakers will explore and discuss the variety of technology, contractual, security, privacy, process, and implementation issues that you should understand before making any technology investment.

FOUNDATIONS OF CHANGE: LEGAL DESIGN THINKING, PROCESS IMPROVEMENT, AND PROJECT MANAGEMENT

Non-CLE

Deneen Warmington, Catherine Alman MacDonagh

Get beyond the buzzwords! Understanding the fundamentals and differences between design thinking, process improvement, and project management and how they can super-charge your ability to create an amazing legal experience for you and your clients. In this session, attendees will learn the basics of these three core skills that every legal professional should know.

21ST CENTURY PRACTICE: CREATING A SUSTAINABLE WORKPLACE FOR THE NEXT GENERATION

R. Amani Smathers, Jordan Furlong

Workplace culture can make or break a law firm, especially in the current environment of work-from-home, the Great Resignation, and more opportunities than ever for lawyers to find meaningful work in non-traditional ways. Come learn about how to design work environments for the next generation to thrive.

ACCOUNTING FOR LAWYERS: INS AND OUTS Non-CLE

Deborah J. Schaefer, David John Bilinsky

Accounting in a law firm is crucial and can be an ethical pitfall for lawyers. Learning the ins and outs of accounting will set your firm up on strong ethical and business ground for success. Management techniques and technology solutions can help too! In this session, we bring in the experts on accounting to discuss all of the ins and outs to help you succeed.

TECHNOLOGY LEADERSHIP FOR EFFECTIVE TEAMS

Non-CLE

Kristin Tyler, Teresa Walker

Success starts at the top! This is true for all aspects of a law firm — from the front office to the back office. Technology is

no different. Leaders need to set the tone for an firm's successful selection, implementation, and vision for how technology is going to shape the law firm of the 21st Century. This session aims to help leaders understand their leadership styles and their teams' unique abilities to lead a technology forward law firm.

CREATING A LAW FIRM LEGACY THROUGH ADOPTING TECHNOLOGIES THAT MATTER

Non-CLE

Marc D. Morse, Kendall B. Williams

Passing the law firm baton to the next generation needs intention and attention. This session will focus lawyers' efforts on creating a lasting professional legacy for their firms through mentorship and the appropriate adoption of technology.

ARTIFICIAL INTELLIGENCE: CONTRACT ANALYSIS AND MANAGEMENT

Laura van Wyngaarden, Alex Su

Artificial intelligence is no longer a hype term! Come learn about how AI is being used, today, in law firms and legal departments to remake how legal professionals analyze and manage contracts. The tools are real, the people are real, and the changes are real!

A CRYSTAL BALL: PEERING INTO THE FUTURE OF BLOCKCHAIN IN LEGAL

Non-CLE

Karol Andrea Valencia Jaén, David Fisher

DAO, NFT, Bitcoin, huh? Blockchain technology is over 10 years old, however, it is still a confusing world of acronyms and concepts for the legal professional. This session will explore the current as-is state of this ground-breaking technology as well as peer into the crystal ball to see what is coming.

VIRTUAL REALITY IN LAW PRACTICE: TRAINING, TRIALS, AND TECHNOLOGY

Non-CLE

William Lloyd Smith, Edit Ómarsdóttir
Virtual reality holds true promise for the legal industry. As virtual reality continues to mature in the video game markets, the technology is showing up in all areas of law practice: training, academic study, evidence presentation, and even remote meetings and work. In this session, we will walk through how VR is different than related technologies and how it can change how we approach areas of legal competence.

MANAGING TECH OVERWHELM

Tanika Finney, Iffy Ibekwe

In modern legal practice, we are bombarded with so many channels

of communication and technology that it can become overwhelming. In this session, we will learn some day-to-day strategies that put the legal professional in control of their technology environment with the hopes of living a more fulfilled, human-centered life.

DESIGNING YOUR CAREER

Non-CLE

Iffy Ibekwe

Design thinking can enhance most areas of work; but what about what, where, and how you work? Yes! Break free from the

currents that have shaped your career and start taking steps to define and implement what you want to truly do. Learn skills to analyze, discern, and define the career path that fits you.

CLE Information

States typically decide whether a program qualifies for CLE credit in their jurisdiction 4-8 weeks after the program application is submitted. For many live events, credit approval is not received prior to the program.

The ABA will seek 10 hours of CLE credit in 60-minute states, and 12 hours of CLE credit for this program in 50-minute states* including 3 hours of CLE ethics credit in 60-minute states and 3.6 hours of CLE ethics credit in 50-minute states. Credit hours are estimated and are subject to each state's approval and credit rounding rules. Please visit the program website at www.techshow.com for program CLE details or visit www.americanbar.org/mcle for general information on CLE at the ABA.

*Florida Bar regulators have stated that attorneys will not receive Florida credit for this ABA program, even if they self-apply.

A limited number of scholarships to defray registration fees may be available for government employees, public interest lawyers employed with nonprofits, academics, and law students, as well as unemployed attorneys. To apply, send a letter outlining the basis for your fee waiver request to Lyndsey Kent at lyndsey.kent@americanbar.org. All requests must be received February 1, 2022. For courses costing over \$500, attorneys who qualify will receive at least a 50% reduction in the course fee(s). This does not include any reduction in lodging or travel costs.

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

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4 IT MYTHS: WHAT MANAGING PARTNERS NEED TO KNOW

Managing partners at small and mid-size law firms have enough to worry about – from day-to-day management to long-term growth and strategies – that it can be overwhelming to keep up-to-date on all of the IT options available to your firm.

The right technology will ultimately support your firm's growth and readiness for the future. As such, we will examine 4 common IT myths, set the record straight, and explain what you need to know to be prepared for the future success of your firm.

MYTH 1: There Are So Many Reasons Not to Move to the Cloud

There's little doubt that as a managing partner who is responsible for your firm's IT, you are considering cloud options. Despite the seemingly vast acceptance of cloud, it may still feel new or overwhelming, particularly when it comes to moving your entire law firm to the cloud.

A common misconception is that cloud is less secure. While it is natural to have some reservations about migrating to new technology, the overwhelming evidence is that cloud is actually more secure than legacy, on-premise systems. There are many other things your firm likely outsources, so it may be easier to think of cloud as another way to outsource. For example, many firms rent their office space, rather than purchase, work with recruiters to hire, and use CPS to do their taxes. Cloud should be no different. Rely on the people and technologies that do their specialties better than you, so that you can focus on what you do best – practice law.

If you are hesitant because you think cloud is a trend or it is too complex, rest assured that cloud will actually simplify your IT. Many individuals are already using cloud in some capacity, like for email (i.e. Microsoft Office 365, Gmail), phone (i.e. Skype, Zoom), or messaging and collaboration (i.e. Slack, Basecamp). Cloud is the future of technology.

Rather than focus on the reasons "why not," look to the many reasons firms decide to make the change. Cloud has key inherent benefits, such as security and backup, and allows you to simplify your IT by removing hardware and infrastructure while adding business continuity.

MYTH 2: Backup is Business Continuity

Far too many people believe that if their data is backed up, their business is safe. The reality is that backup is only one piece of business continuity. As a managing partner, you must focus on the entire strategy to ensure that after a failure, your firm gets back up and running with as little loss of productivity as possible.

There are several scenarios to consider when your firm would require backups; one being natural disasters that could cut

power to your offices and even access to the physical location including computers and servers. The more likely scenario is one that impacts only your firm, like hardware failure, system corruption, server or application malfunction, or cybercrimes. In cases like these, your business continuity plan is exceptionally important since only your firm is impacted and you want to prevent client attrition to other firms. Time is of the essence.

There are several types of business continuity systems and some are much more expensive than others. To determine what's right for your firm, first ascertain what amount of time is acceptable for an outage, whether that be measured in hours or days. Figure out when the impact of an outage becomes too costly. This is known as the recovery time objective (RTO), an acceptable downtime window. For example, if your practice management server is out, within how many hours must it be restored to avoid unacceptable consequences? It is vital to select a business recovery platform that brings your servers and all applications back online within your RTO. Weigh this against the costs of various business continuity platforms to focus on the appropriate solution for your firm.

No matter what business continuity system you choose, it has to be sized correctly to your firm and be able to scale as your firm changes. It is also ideal to have multiple backups made per day and the entire process must be managed, continually monitored, and tested.

MYTH 3: Security is Only for Large Firms

In the past, managing partners believed that cybersecurity was an expensive and unnecessary endeavor for their small or midsize firm. The reality is that cyberattacks have become too widespread for you to ignore. The high-profile cyberattacks we read about in the news usually focus on large, global organizations, but according to Verizon's 2018 Data Breach Investigations Report (<https://enterprise.verizon.com/resources/reports/dbir/>), **58% of all cyberattacks target small businesses.** Smaller organizations are typically easier to breach because of their lower security standards, and it only takes one improperly secured device for a breach to occur.

While cybercriminal activity could be politically or socially motivated, it is most often simply to make money. In phishing

schemes, for example, cybercriminals send out thousands of emails and wait for one person to make a mistake, click on a link, and provide sensitive data. This information, in turn, is used to access important accounts and can result in huge financial losses.

The evolution of malware makes a breach particularly dangerous for your firm. Rather than only impacting a single device, malware effects all devices on the network, all applications and data, and can effectively grind your firm's operations to a halt. The latest phishing malware allows for cybercriminals to take control of a firm's email system, usually Office 365. These tactics have changed how small and midsize firms need to protect themselves.

So, what does a comprehensive security plan look like for a small and midsize firm? Any good security system will be multi-layered. Consider the example of securing your home: You lock your doors and windows, close up your garage, set an alarm, and perhaps also install security cameras. You would not consider leaving your front door unlocked just because you armed your security system. The multi-facets are key to protecting your home and valuables, just as several precautions need to be taken at your firm.

A comprehensive security plan should include:

- Email filtering software scans all incoming messages for spam and other harmful attachments. It may reject or redirect messages that are flagged as potentially harmful.
- It is not just email that needs protection. Any application that transmits data, such as collaboration tools, needs to have security, whether it be built into the program or used alongside it.
- Antivirus and anti-malware software will find and remove immediate threats from your systems.
- Every firm, regardless of size, needs a business grade firewall that sits between a firm's internal network and the internet and serves to prevent unwanted access to the firm's systems.
- The vast majority of law firms require remote access so lawyers can work from home, client offices, or the courtroom. As such, firms often have a VPN or other remote desktop solution in place. It is crucial to ensure your remote access solution is secure, usually through encryption and authenticated connections.
- Multi-factor authentication (MFA) adds an additional layer of security to guard against a compromised password.
- Additional encryption tools at the email, desktop, and server levels should be considered to provide your firm the best protection to meet your needs.

Remember, security is a process and protection needs to evolve as the threat landscape changes.

MYTH 4: *Technology is Enough*

It is vital for law firms to focus on technology to protect their systems and data, but a firm would be in serious danger if it stopped there. The people using your IT systems – your attorneys, paralegals, and support staff – are the single greatest threat to your organization. It is easier for a cybercriminal to deceive a person than technology, so even with all of the right technology precautions in place, they are only effective with appropriate education and policies.

Education and training are essential for everyone, whether that be held in person, via webinar, or through reading materials and video tutorials. It is crucial to also run tests throughout the year to uncover areas where risks remain and additional training is necessary.

The most likely tool to be used to compromise your systems is email. According to Verizon's Annual Data Breach Investigations Report (<https://enterprise.verizon.com/resources/reports/dbir/>), **more than 92% of malware originated in an email link**. Choose email policies that will work best for your firm. For example, most companies still maintain webmail even though users outside of the office prefer to access their email via remote access, smartphones, or tablets. If webmail is not being used, turn it off. Many firms also choose to restrict public email domains, such as Gmail and Yahoo.

Here are some technology policies to consider:

- Rather than give remote access to everyone in the firm, provide logins only to those lawyers and staff who need it.
- Place appropriate restrictions on any guest Wi-Fi available to visitors in your office.
- Content filtering technology can restrict sites that are potentially harmful and prevent users from accessing them.
- Standardize how your firm works. If your firm uses collaboration or filing sharing tools, choose a single, vetted platform that everyone must use, rather than leaving it up to each individual or department.
- Make it a part of your process to continually assess and change your firm's policies as you see what works and what needs improvement.

CONCLUSION

IT is more complex than ever with changing needs and evolving technologies. It is important to make appropriate, educated IT decisions for your law firm to better prepare your firm for future successes. The right technologies and policies will modernize your practice and improve efficiency.