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AGENDA | AT A GLANCE

WEDNESDAY, NOVEMBER 11, 2020

- 8:30 am - 8:50 am | Exhibitor Demos
- 9:00 am - 9:20 am | Introductory Remarks
- 9:30 am - 10:30 am | Strong and Effective Client Relations, and Staying Within Ethical Boundaries in a COVID World
- 10:30 am - 10:45 am | Break/Expo Hall
- 10:45 am - 11:45 am | Masking Justice: How COVID-19 is Impacting Court Practice and Other Required Face-to-Face Interactions
- 10:45 am - 11:45 am | Building Your Network — In-Person and Virtually
- 11:45 am - 1:00 pm | Lunch/Expo Hall/Networking Sessions
- 1:00 pm - 2:00 pm | Leveraging Technology for Continued Advantage in a Post-COVID Landscape
- 1:00 pm - 2:00 pm | Moneyball for Lawyers — Managing by the Numbers to Get Major League Results
- 2:00 pm - 2:30 pm | Expo Hall

THURSDAY, NOVEMBER 12, 2020

- 8:30 am - 8:50 am | Exhibitor Demos
- 9:00 am - 10:00 am | Top 10 Ways to Minimize Risk While You Manage Your Growth
- 9:00 am - 10:00 am | Going Solo in the Age of COVID
- 10:00 am - 10:15 am | Break/Expo Hall
- 10:15 am - 11:15 am | Learn the Legal Research Tools of Casemaker 4 in a Case Study
- 10:15 am - 11:15 am | How to Build a Powerful Niche Practice
- 11:20 am - 12:20 pm | Reset Your Initial Consultation Approach and Convert More Clients: How COVID-19 Changed the Way People Buy Legal Services
- 12:20 pm - 1:00 pm | Break/Expo Hall/Networking Sessions
- 1:00 pm - 2:00 pm | Staying Mentally and Ethically Healthy During COVID-19
- 2:00 pm - 2:30 pm | Thank You Remarks and Giveaway

AGENDA

WEDNESDAY, NOVEMBER 11, 2020

8:30 am - 8:50 am | Exhibitor Demos

9:00 am - 9:20 am | Introductory Remarks

Sheila S. Boston, President, New York City Bar Association

Janet DiFiore, Chief Judge of the Court of Appeals and of the State of New York

9:30 am - 10:30 am | Strong and Effective Client Relations, and Staying Within Ethical Boundaries in a COVID World

Claude E. Ducloux, LawPay

Plenary — *Ethics CLE*

This entertaining, high energy, and award-winning program covers both starting firms and established firms and touches on everything from interviewing skills, documentation, financial control, billing and billing rates, payments, conflicts of interest, and getting work in...and out... the door. Strong references to applicable ethics rules and many examples are contained throughout.

Demonstrating that competency, ethics and client relations will be improved by knowing how to run your office, how to relate effectively with clients, how to make your practice cash flow with simple but effective budgeting, and understanding the nature of problem-solving as your profession.

10:30 am - 10:45 am | Break/Expo Hall

10:45 am - 11:45 am | Masking Justice: How COVID-19 is Impacting Court Practice and Other Required Face-to-Face Interactions

David Cohen, David L. Cohen, P.C.; Gary Kaufman, The Law Office of Gary Kaufman, PLLC;

Alla Roytberg, Law Firm and Mediation Practice of Alla Roytberg, P.C.; Nydia Shahjahan, Nydia Shahjahan, Esq. P.C.

1.0 Professional Practice

Certain aspects of legal practice have always required face-to-face interaction, especially litigation. One of the cornerstones of the common law system, the live cross-examination of witnesses in the presence of the accused and the accuser is a central part of nearly all US legal proceedings and worthy of note when not conducted face-to-face. As a result of the current pandemic, courts and other legal rules have had to be adapted to accommodate public health best practices. This panel will examine how laws, regulations and administrative practices have or have not changed. After a review of current health guidelines and how the law in the US and elsewhere has handled prior pandemics, the panel will give presentations and have a lively discussion about any changes or lack thereof in the federal and state systems; civil, criminal and divorce courts; and in mediation.

10:45 am - 11:45 am | Building Your Network — In-Person and Virtually

Rebecca Maxwell, Chief Operating Officer and Principal Consultant, Asentiv New York
Non-CLE

Getting value from networking, whether in-person or virtually, is not always easy. When we build valuable networks, they will see us through the more challenging times.

In this session, you will:

- Clearly identify what your network actually gives you
- Identify who you should be working with
- Deepen trust and credibility with the right people
- How to avoid the simple relationship killers
- Create a comfortable structure on virtual meetings
- Maintain engagement virtually

11:45 am - 1:00 pm | Lunch/Expo Hall/Networking Sessions

1:00 pm - 2:00 pm | Leveraging Technology for Continued Advantage in a Post-COVID Landscape

Bradley Bailyn, The Bailyn Law Firm, P.C.; Mike Baldwin, PCLaw | Time Matters
1.0 Professional Practice

The 2020 reality of practice management technology: what were once seen as choices of efficiency or personal preference are suddenly non-negotiable. COVID-19 has forced legal into a world where paperless and contactless operations are often the only considerable choice, and many firms and court systems have been rushed into this new reality almost overnight. As we look anxiously ahead to a post-COVID period, it's highly likely that these efficiencies will not disappear nor revert; in fact, the future competitive bar has essentially already been raised for how law firms will need to operate for survival.

We will focus on three main areas of efficiency where we have observed change, opportunity, and quite a bit of trial-and-error throughout these COVID times: documentation, customer relationship management, and courtroom proceedings.

Learning objectives:

- Recognize the lasting significance of the process changes that COVID-19 has compelled upon law firms and court systems
- Understand real world examples of how firms have successfully adapted to not only current constraints, but best positioned themselves for long-term competitive advantage
- Discover opportunities where and how practice management technologies will play a critical role in these operational shifts

1:00 pm - 2:00 pm | Moneyball for Lawyers — Managing by the Numbers to Get Major League Results

Introduction: Mark Josephson, Murray and Josephson, CPA

Speaker: Christopher Anderson, Sunnyside Services, Ltd.

Non-CLE

In the hit movie, "Moneyball" the General Manager of a small-budget team adopts a numbers based approach from a young Yale graduate to try to do more with less. Along the way, he faces ridicule from his board, obstruction from the team manager, and general derision. This new way of thinking violates all of the conventional wisdom. Of course, the conventional wisdom makes it clear he just can't compete with the budget he has.

Paying close attention to numbers, and managing to results, rather than "promise," the manager makes a successful run, taking what started as a dismal season into a huge winning streak, and a trip to the playoffs. Eventually, this methodology changed the game of baseball.

The legal profession has its own conventional wisdom. Yet some small firm owners, including solos, are finding that paying attention to the numbers we will discuss, and adopting a new way of thinking about their businesses, is allowing them to reach major league success.

In this session, we will discuss the numbers every law firm stakeholder must know, and the key reports you should be looking at every month and every week. We will discuss why you're in this business in the first place, and how to use your law firm to achieve your own success, while delivering quality service to your clients. You will come away from this fast-paced session with actionable tactics that you can implement right away to begin to put together base hits, walks and stolen bases and transform your firm into a practice that works for you!

2:00 pm - 2:30 pm | Expo Hall

THURSDAY, NOVEMBER 12, 2020

8:30 am - 8:50 am | Exhibitor Demos

9:00 am - 10:00 am | Top 10 Ways to Minimize Risk While You Manage Your Growth

Ken Citarella, Guidepost Solutions LLC; Roger Gill, Lockton; Devika Kewlaramani, Moses & Singer; Lisa Shrewsberry, Traub Lieberman

1.0 Law Practice Management

Law Firms who have established themselves are in need of ongoing risk management due to threats against their firms in numerous ways. We would provide the audience with the ways to minimize their risk in both running the day-to-day operations, as well as through growth of attorneys and staff through individual hires or acquisitions. These risks include malpractice concerns, ethical issues, employment risks and data security.

9:00 am - 10:00 am | [Going Solo in the Age of COVID](#)

Joam Alisme, Alisme Law LLC; Alexandre Leturgez-Coianiz, Roche Legal PLLC; Stephanie Messas, The Messas Law Practice, PLLC; Lewis P. Trippett, Higgins & Trippett LLP
Non-CLE

Thinking of launching your own practice? Is that something that is even possible in the COVID era? This panel discussion will consist of four experienced attorneys who have done just that and lived to tell about it. Tips on what you need to do to launch a practice, set up your office and get clients will be provided along with a chance to ask questions that may be on your mind before you make the plunge.

10:00 am - 10:15 am | [Break/Expo Hall](#)

10:15 am - 11:15 am | [Learn the Legal Research Tools of Casemaker 4 in a Case Study](#)

Speakers: Karl Dowden, Karl Dowden Law; Rebecca L. Skeeles, Casemaker
1.0 Professional Practice

This seminar will showcase the great tools of Casemaker 4 and take attendees on a journey of a researching and representing a client in an actual case. Learning objectives include introducing first-time users to Casemaker and teaching existing users new tools and the new interface of Casemaker 4.

10:15 am - 11:15 am | [How to Build a Powerful Niche Practice](#)

Bill Jawitz, SuccessTrackESQ
Non-CLE

Clients increasingly expect their attorneys to have specialized knowledge of, and experience with, the specific problem or opportunity for which they're seeking legal help. This hands-on program will lead you through a proven process to identify where and how to capitalize on your experience and interests in order to more effectively reach A-level prospects.

You'll learn:

- The myths and misconceptions about "niching"
- How to research possible niches
- How to differentiate yourself in the marketplace with a strong value proposition
- How to improve both your gross revenues and your profit margins by narrowing your focus
- How to make the transition from your current practice profile

Who should attend:

- General practice attorneys who are seeking to transition into fewer, better defined areas
- Attorneys who are already semi-focused into a few practice areas or industries but who want to go deeper
- In-house counsel or attorneys in existing firms thinking of starting their own practice
- Newer lawyers looking to jumpstart their business development strategy

**11:20 am - 12:20 pm | Reset Your Initial Consultation Approach and Convert More Clients:
How COVID-19 Changed the Way People Buy Legal Services**

Liz Wendling, Liz Wendling Business Consulting and Sales Coaching

Plenary — Non-CLE

The recent pandemic has forced an overnight change on every law practice and dramatically affected the way people buy legal services. Attorneys now realize the need to reset their consultation approach to align with the new savvy legal consumer. What used to work has lost its effectiveness.

In this presentation, you will discover why:

- The way you are connecting, communicating, and engaging may be repelling, not attracting clients. Strong people skills are needed now more than ever
- The specific words and phrases that are outdated and old school and decrease your trust and credibility. (This one alone will be worth your time)
- Your consultation approach no longer aligns with the way people hire attorneys and buy legal services.

Join this session to make a lasting and positive impact on the way people view you and your firm.

12:20 pm - 1:00 pm | Break/Expo Hall/Networking Sessions

1:00 pm - 2:00 pm | Staying Mentally and Ethically Healthy During COVID-19

Meredith Heller, Law Office of Meredith S. Heller; Joseph Milowic III, Quinn Emanuel Urquhart & Sullivan; Eileen Travis, Lawyer Assistance Program

Non-CLE

This session will cover the relationship between mental health issues and how they can affect your ethical obligations.

Faced with the “new normal”, including working remotely, social distancing, lack of physical contact with family members, friends and colleagues and experiencing feelings of isolation, it’s essential to make mental health a priority. Anxiety, worry, and stress are normal responses to living in the uncertain times of the COVID-19 pandemic. If mental health issues are not addressed, work, relationships and quality of life can be affected. Impairment can lead to ethical problems. Practicing self-care promotes good mental health and work life balance, benefiting overall health and well-being.

Learn:

- How to avoid ethical pitfalls
- How to practice self-care to achieve and maintain mental wellness
- The importance of reaching out for help if you or someone you care about is struggling with a problem
- The free and confidential resources available to lawyers and their family members

2:00 pm - 2:30 pm | Thank You Remarks and Giveaway

Prizes will be distributed during this time based on attendee engagement. Rules for the giveaway will be posted online. You must be present to win.



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