

2019 Law Practice Today Expo- CLE Course Descriptions

Thursday, April 11, 2019

THURSDAY TRACK 1 - RESEARCH & EFFICIENCY (3 Sessions)

1:00 – 2:00 p.m.

Cost Effective/Time Efficient Legal Research

Ann Long, *LMU Duncan School of Law*

Learn how to save time and money using reliable free legal resources on the Internet. Learn which resources may be worth the \$\$\$ to help save time. Participants will receive access to a website with reliable, free and low-cost Internet sites to help streamline future research efforts.

2:15 – 3:15 p.m.

Cybersleuthing: People Searching and Social Networks

Bill Dean, *LBMC*

While the internet is a phenomenal source of information, its vastness renders it terribly inefficient for identifying focused, valuable information. Attendees will learn how to become familiar with the tools to “cybersleuth” publicly available information in a structured and methodical manner. While popular social media sites such as Twitter, Instagram, and Facebook are covered in detail, the presentation delves much deeper into the extensive resources available online for researching personal and corporate information to assist in your cases.

3:30 – 4:30 p.m.

Microsoft Word Power Tips for Legal Users

Barron Henley, *Affinity Consulting Group (Ohio)*

Most lawyers find Microsoft Word to be a constant source of frustration. It's the primary tool we use to produce work product, yet it so often seems to be working against us. Learn to master Word, leading to faster turn-around, higher drafting accuracy and better client service. Learn exactly how to fix the common legal drafting problems plaguing you now and avoid them in the future.

THURSDAY TRACK 2 - ETHICS OF MARKETING (3 Sessions)

1:00 – 2:00 p.m.

The Ethics of Marketing Online to Millennials

Chris Homer, *GNGF*

Millennials are about to be the largest generation in the work force. Being digital natives this group has higher expectations of your web presence. We will walk through the expectations of the typical millennial user and show you the tools and technologies you should be incorporating into your online presence to attract this generation. Of course, with these new tools also come new ethic concerns with regards to marketing. Attorneys will learn: (1) Expectations and habits of the typical millennial prospect; (2) Updating your web presence to support millennial users; (3) How to be an on-demand, 24/7, always on law firm; (4) Ethical Issues Surrounding Posting on Social Media; and (5) Ethical Issues Surrounding texting, online-chat, and client portals. This CLE delivers a lot of educational content about the millennial generation with regards to working with them online as a prospect or a client. Law firms will leave the CLE with the best knowledge to navigate their online presence ethically when adapting it to the millennial prospect.

2:15 – 3:15 p.m.

Using Data and Analytics to Manage and Improve Your Law Firm + Ethics of Securing your Data

Chris Homer, *GNGF*

What does day to day management of a law firm look like when the data from software tools and analytics are used to make decisions? The old adage goes “what gets measured gets managed”. You can track a lot of data now, from client satisfaction, utilization rates, and receivables, to intake, conversion rates, website traffic and social media mentions. With the right know-how, you have the ability to track and measure this data to begin predicting what the next few months of business will look like for your law firm. With more data comes the issue of data security and in this session the presenter will cover: (1) The data you should track to calculate the leading indicators of your law firm's future success; (2) Using scorecards to drive the management of your law firm; (3) Real examples from a successful data-driven law practice; (4) How Model Rule 1.1 on Competence, Rule 1.6 on Confidentiality, and Rule 5.3 on Nonlawyer Assistance are requiring law firms to be up to date on data security issues; (5) The most current “Reasonable Efforts” to understand about data security; and (6) Cloud Computing and the latest cloud computing ethics opinions. Following this CLE course, lawyers will understand the various technologies available to them to help improve how they best use data to better manage their law firm and the latest data security approaches law firms need to take to stay in compliance with their state's professional ethics rules.

2019 Law Practice Today Expo- CLE Course Descriptions

3:30 – 4:30 p.m.

Managing Your Online Reputation Ethically & Professionally

Ernest Svenson, *New Orleans attorney, PaperlessChase & Law Firm Autopilot*

Your legal reputation is influenced by what you do. But words also matter, especially what other people say about you on the Internet. You can influence online dialogue to enhance your professional stature. In this session, learn what tasteful tools and methods are appropriate for lawyers to use; the #1 most powerful thing you can do to impact your online reputation; why an effective website is crucial for small firm lawyers, and WAY more affordable than you probably imagine; a fantastic tool for following up with site visitors; how social media is over-rated and mostly useless for influencing your online reputation; and why the most powerful secret to online reputation building isn't technology, but something simpler and more profound.

THURSDAY TRACK 3 - LAW OFFICE MANAGEMENT (3 Sessions)

1:00 – 2:00 p.m.

Digital Security for Lawyers: Avoid Hackers & Lost Data

Ernest Svenson, *New Orleans attorney, PaperlessChase & Law Firm Autopilot*

Hackers are a constant, serious threat. They've set up automated bots that scour the web for vulnerabilities, and odds are you're on their hit list. And yet, if you know what to do, you can protect yourself against virtually all of those common attacks. Discover what the #1 weak link is in your security wall and why weak passwords are the #2 weak point, and how to quickly and easily prevent hackers from gaining access through this channel. Learn how you can stop a hacker from gaining access to your online accounts EVEN IF they have your password.

2:15 – 3:15 p.m.

Social Media in the Hiring Process: Pitfalls and Protections

Chris McCarty, *Lewis Thomason King Krieg & Waldrop, P.C.*

Many law firms are looking at the online social media profiles of candidates as part of their background check. But if this process isn't done correctly and according to the law, hiring managers could be putting themselves at risk for a lawsuit.

3:30 – 4:30 p.m.

Law Firms and the Day You Hope Will Never Come: Preparing for Disaster

Kathryn Scourby, *KNS Consulting*

It could be a burst pipe, a fire in a neighboring suite, a workplace violence incident or a weeklong power outage....it doesn't have to be a natural disaster that could close your firm or affect the firm's reputation. Does your law firm's current business continuity plan address all the essential components necessary to seamlessly continue providing services to clients/customers if such a situation were to occur? If not, then this session is for you. Items such as IT recovery and cyber security protection, alternate work space, risk management and compliance, crisis communication systems and comprehensive written business continuity plans will be discussed in an interactive session.

Friday, April 12, 2019

FRIDAY OPENING SESSION

9:00 -10:00 a.m.

The Bill & Phil Show 2019: BEAT THE CLOCK - Technology to Save You Time and Keep You Young

Bill Ramsey, *Neal & Harwell (Nashville)*, and **Phillip Hampton**, *LOGICFORCE (Nashville)*

Attorney Bill Ramsey and Tech Entrepreneur Phil Hampton are back with a fresh look at the latest technology trends, gadgets, and apps impacting legal professionals in 2019. They will focus on technologies to help professionals "Beat the Clock". They will survey the best new tech helping stressed professionals save time, improve efficiency, and create more quality time in a hectic day. Beyond just redeeming the time, the tech gurus will explore how technology does not have to be just a young person's game. Some say 70 is the new 40; and Bill and Phil will show how technology can be used to turn back the clock and rejuvenate work and life even as the calendar pages keep turning. No tech expertise required...just an open mind and a young heart.

2019 Law Practice Today Expo- CLE Course Descriptions

FRIDAY TRACK 1 - LITIGATION (4 Sessions)

10:15 – 11:15 a.m.

How to Advise Clients, Manage Judicial Holds, and Discovery with Social Media

Chris Homer, GNGF

This course outlines how to properly advise your clients about the risks and liabilities when they use social media networks. We will also discuss using social media as evidence and understanding judicial holds. Based on recent ethics opinions, it is clear that lawyers are required to understand the basics of how social media platforms function in order to advise clients on the impact of their behavior. Also, if you are going to trial, you may need to be able to communicate about various social platforms. Attorneys will learn: (1) How People Use Social Media in Their Daily Lives; (2) Facebook, Twitter, Instagram, Pinterest, and More; (3) Judicial Holds and Deleting Social Media Information; (4) Discovering Issues Around Social Media; and (5) When Is Something Public and When Is It Private? After this course, you will be able to guide your clients more effectively, communicate clearly regarding issues surrounding publishing on social networks and know which possible areas should be avoided for ethical reasons.

11:30 a.m. – 12:30 p.m.

Practical & Ethical Guidelines for Texting with Clients

Stephen Ross Johnson, Ritchie, Dillard, Davies & Johnson and Sandy Garrett, Chief Disciplinary Counsel, Board of Professional Responsibility

Text messaging, known as short and multimedia message service (SMS and MM), has exploded in popularity leading to a glut of less formal (and less cautious) “instant” communications which can easily be misconstrued between client and attorney. Rules requiring technological competence mandate that attorneys understand how technology works and that reasonable care is taken to protect confidentiality of client’s electronic communications. Lawyers have a duty to maintain the integrity of their files, and text communications with clients, witnesses, opposing counsel, and others in a case may need to be preserved for the client’s file. Outside of attorney-client communications, texts can also be discoverable, and failure to plan accordingly may result in damaging admissions, adverse inferences or worse. The ethical obligations of counsel will be discussed as well as the technical aspects of preserving text communications.

2:00 – 3:00 p.m.

Manage Your Case File Using OneNote

Jonathan Cooper, Whitt, Cooper & Hedrick

You have a full production of e-discovery scanned, loaded, and searchable. What do you do with all the emails, attachments, Word documents, photos, and .pdfs? How will you organize it and bend it to your will? Microsoft OneNote and similar programs revolutionize the process for compiling, organizing, and annotating huge discovery dumps common in many civil and criminal cases today. Collect, arrange, and sort records in groups, by chronological order or category, or in way that makes sense. Add notations, flags, or drawings. This program will show you how to use OneNote to manage, simplify, and organize complex files, and how to easily collaborate and share this work with others on your team.

3:30 – 4:30 p.m.

Avoiding “Benchslaps”: The Real Scoop from the Other Readers of Your Appellate Briefs- *Approved for 1 hour of General CLE Credit*

Rebekah Bradley, Tennessee Court of Appeals; Sally Goade, Tennessee Court of Appeals (moderator), Alan Groves, Judicial Law Clerk, Tennessee Court of Appeals; Vanessa Johnson, Tennessee Judicial Department; Amye King, Tennessee Court of Appeals; Cindy Padilla, Tennessee Court of Appeals; Amy Paul, Tennessee Court of Criminal Appeals; Porsche Shantz, Tennessee Judicial Department and Carlos Yunsan, Tennessee Supreme Court

A panel of judicial law clerks and staff attorneys from the Tennessee Supreme Court, Court of Appeals, and Court of Criminal Appeals will give examples of good (and not so good) brief writing and suggestions to improve your briefing and motion-drafting skills with a focus on earning the trust of all the sets of eyes that read every word you submit. With a presentation designed for new and experienced appellate practitioners alike, the panel will note some pertinent and often problematic rules, give suggestions to help you avoid frustrating the appellate courts, and offer tips for explaining your case and clarifying your argument. A question-and-answer session will also be included, so bring any questions you have about appellate practice, especially the parts that involve presenting the record, researching the law, and writing an argument that may make it easier for an appellate court to rule in your favor.

2019 Law Practice Today Expo- CLE Course Descriptions

FRIDAY TRACK 2 - TRANSACTIONAL (4 Sessions)

10:15 – 11:15 a.m.

The Effect of Recent Tax Law Changes on Current Businesses- *Approved for 1 hour of General CLE Credit* **O.E. (Sonny) Schow, Woolf, McClane, Bright, Allen & Carpenter, PLLC**

Understand the biggest changes impacting businesses – what’s changed and what that means for business planning this year and moving forward: Corporate Tax Rate; Pass-through deduction; Depreciation (expensing); Business interest deduction and NOLs; Accounting and partnership provisions; Business credits; Corporate AMT; International Provisions and BEAT; Benefits and compensation provisions; And More.

11:30 a.m. – 12:30 p.m.

Advanced Purchase and Sale Agreements - *Approved for 1 hour of General CLE Credit*

Panel: Robyn Askew, Lewis, Thomason, King, Krieg & Waldrop, P.C. (Moderator); Brian Krumm, U.T. College of Law; Christi Branscom, Partners Development and Jordana Nelson, Bass, Berry & Sims, PLC

Experienced practitioners will provide an in-depth discussion of select purchase and sale agreement topics, including:

- Identify the top “gotchas” in commercial PSAs
- Learn the current trends in representations and warranties, damage caps, and survival periods
- Uninsured losses—how to deal with them in a PSA
- Estoppels—what does a buyer need? What should a seller give?
- Electronic data rooms—what you see is what you may get!

2:00 – 3:00 p.m.

Better Methods for Drafting Legal Documents

Barron Henley, Affinity Consulting Group (Ohio)

When you need to generate an engagement agreement, a cease and desist letter, or a residential lease do you look for the last one you created and start cutting? Stop! There is a better way! Features built into Microsoft Word like autocorrect, templates, Quick Parts, and developer tools will save you time, prevent errors and ensure consistency. Learn to manipulate PDFs to combine and recombine electronic documents. Fill out scanned PDF “forms” in one step. Sign on the dotted line without printing out a document. Learn to use the software that you already have to make document generation faster, with fewer errors, for everyone in your firm.

3:30 – 4:30 p.m.

Data Privacy – Why do you need to know about GDPR? - *Approved for 1 hour of General CLE Credit*

Eliza Scott, Woolf, McClane, Bright, Allen & Carpenter, PLLC

This session will help you understand how personal data is being regulated. As marketplaces become more global and our clients do business outside the borders of the U.S., they will need to understand how to comply with regulations related to the storage, use, and sharing of their customers’ personal information. The General Data Protection Regulation (GDPR) from Europe became effective in 2018 and impacts every company doing business with persons located in the European Union. This section will address the theory and basic provisions of the regulation, in addition to some key terms and effects. There will also be a review of some GDPR cases.

FRIDAY TRACK 3 - TECH UPDATES (4 Sessions)

10:15 – 11:15 a.m.

Essential Law Firm Technology

Barron Henley, Affinity Consulting Group (Ohio)

The Best Of What’s Out There Technology advances quickly and it’s not easy to keep up with it while also trying to practice law. Learn the technologies that can help any lawyer solve problems, improve client service and make life easier. Learn about the essential software and hardware tools that can help you protect client confidentiality, organize case information, manage your practice more efficiently and improve profitability.

2019 Law Practice Today Expo- CLE Course Descriptions

11:30 a.m. – 12:30 p.m.

Paperless Lawyering: Making Your Practice Exponentially Easier To Manage

Ernest Svenson, *New Orleans attorney, PaperlessChase & Law Firm Autopilot*

Imagine being able to instantly access information in your client files, anytime—even if you're out of the office. Learn the simple, sensible method used by a commercial litigator who went from paper-intensive big firm practice into a low-overhead solo practice. You can smoothly make the shift to an efficient, low-stress paperless practice even if your computer skills are limited to doing email and surfing the web. Attendees will learn: the biggest myth about paperless lawyering, the best scanner for small law firms, which documents you MUST keep in paper form, the top 5 benefits of a paperless law practice, why PDF skills are crucial, and how to learn them painlessly and quickly, and steps to make the transition.

2:00 – 3:00 p.m.

Law Firm Autopilot: 3 Pillars to Prosperity & Freedom

Ernest Svenson, *New Orleans attorney, PaperlessChase & Law Firm Autopilot*

Learn to create a practice so smooth-running that it feels like it's on autopilot. Discover how you too can earn more while working less so you can spend more time away from the office doing fun things besides practicing law. All you need is a proven blueprint that shows you how to use technology sensibly and strategically. Attendees will learn: How to get better clients the fast, simple, inexpensive way (using basic technology that you're already used to and adept with); How to dramatically improve efficiency (and lower overhead) through digital automation; and How to hire exceptionally talented workers to help you run your law firm, even on a part-time basis (using virtual assistants available to you anywhere in the world).

3:30 – 4:30 p.m.

Legal Tech Security Measures Every Lawyer Must Take

Barron Henley, *Affinity Consulting Group (Ohio)*

ABA Rule 1.6(c) stipulates that a lawyer must make reasonable efforts to prevent the disclosure of confidential client information. The comments to Rule 1.6 require lawyers to act competently to safeguard client information and require that when "transmitting a communication," lawyers must take reasonable precautions to prevent client information from falling into the wrong hands. Learn how to cover all the bases of computer, smartphone, tablet, email, wireless and document encryption. Learn the fundamentals of backing up your electronic data. Learn how to establish best practices in your office and discover the inexpensive or free tools that will make sure your confidential information remains confidential.