

CLE18-101**REGISTRATION INFO**

Name _____

Phone _____ Fax _____

City _____ State _____ Zip _____

Email _____

Member No. / Supreme Court No. _____

SELECT BREAKOUT OPTIONS

	TUESDAY		WEDNESDAY	
10:45	<input type="radio"/> 1	<input type="radio"/> 2	10:45	<input type="radio"/> 1 <input type="radio"/> 2
3:15	<input type="radio"/> 1	<input type="radio"/> 2	1:00	<input type="radio"/> 1 <input type="radio"/> 2a <input type="radio"/> 2b
4:15	<input type="radio"/> 1	<input type="radio"/> 2	3:15	<input type="radio"/> 1 <input type="radio"/> 2

PROGRAM TUITION*(INCLUDES ELECTRONIC MATERIALS ONLY)*

	One Day		Two Days		OSBA Solo, Small Firms and General Practice Section Members
	MEMBER	NON-MEMBER	MEMBER	NON-MEMBER	
Pre-Register	<input type="radio"/> \$253	<input type="radio"/> \$316	<input type="radio"/> \$505	<input type="radio"/> \$631	<input type="radio"/> \$405
Walk-In	<input type="radio"/> \$265	<input type="radio"/> \$328	<input type="radio"/> \$530	<input type="radio"/> \$656	<input type="radio"/> \$430
Government Attorney	<input type="radio"/> \$215	<input type="radio"/> \$316	<input type="radio"/> \$429	<input type="radio"/> \$631	<input type="radio"/> \$329

GROUP DISCOUNT: Three or more registrants from the same office receive \$25 off per registrant. Registrations must be submitted at the same time to be eligible.

DAYS ATTENDING

Tuesday (DEC 11) Wednesday (DEC 12) Both

AVAILABLE FOR PURCHASE (MAIL/PHONE ONLY - INCLUDES TAX AND SHIPPING)

ATTENDING ONLY | NON-ATTENDING - NOT ELIGIBLE FOR CLE CREDIT

BOOK: \$25 | **BOOK:** \$55

FORM OF PAYMENT

Enclosed is a check for: \$ _____

Make check payable to: *Ohio State Bar Association*

Credit Card: Visa Mastercard American Express Discover

Card Number: _____ Exp: ____/____/____

Signature: _____

P.O. BOX 16562
COLUMBUS, OHIO 43216-6562



Return Service Requested

17th Annual OSBA Management and Technology Institute

DATE AND LOCATION:

DEC 11 | 9:00AM - 5:00PM
DEC 12 | 9:00AM - 4:15PM

Columbus
Ohio State Bar Association, 1700 Lake Shore Dr., 43204

Hotel Accommodations:

Hyatt Place Columbus/OSU
795 Yard St.
Columbus, Ohio 43212
614-280-1234
Reservations may be made by calling 888-492-8847 or via the hotel website at www.hyattplacecolumbusosu.com.

Reference corporate rate code **36133** for discount.

12.25 HOURS

**DEC 11
& 12**

**OHIO STATE BAR
ASSOCIATION**
Connect. Advance. Succeed.



17th Annual OSBA Management and Technology Institute

LiveCLE

12.25 Total CLE hours
3.5 HOURS Professional Conduct
(includes 1.0 hour optional breakout session)



Cosponsored by OSBA Solo, Small Firms and General Practice Section and Ohio Bar Liability Insurance Company

OSBA Solo, Small Firms and General Practice Section members may attend for \$100 off the two-day preregistration price! See registration panel for tuition information.

Contact Member Services at 800-232-7124 if you are interested in becoming a member of the Solo, Small Firms and General Practice Section.

COLUMBUS

REGISTER ONLINE:
ohioabar.org/CLE18-101

CALL TO REGISTER:
(800) 232-7124

INSTITUTE FACULTY:

Brett Burney; Burney Consultants, LLC; Chagrin Falls
 Danielle DavisRoe, Esq.; Affinity Consulting Group; Columbus
 Damon S. Hacker; President and CEO, Vestige Digital Investigations; Medina
 Barron K. Henley, Esq.; Affinity Consulting Group; Columbus
 Gretchen Koehler Mote, Esq.; Director of Loss Prevention, Ohio Bar Liability Insurance Company; Columbus
 Sharon D. Nelson, Esq.; President, Sensei Enterprises, Inc.; Fairfax, Virginia
 Jeffrey R. Schoenberger, Esq.; Affinity Consulting Group; Columbus
 John W. Simek; Vice President, Sensei Enterprises, Inc.; Fairfax, Virginia
 Paul J. Unger, Esq.; Affinity Consulting Group; Columbus

AGENDA

DAY 1: TUESDAY, DECEMBER 11

8:15 Registration/Continental Breakfast

8:55 Welcome

9:00 Legal Tech Tips, Tricks, and Apps

One of our most popular sessions covers all of the latest developments in legal technology. We'll cover where to go for legal-specific tech help, gadgets and utilities that will help you communicate with your clients better and improve the service you render, tablet and cloud-computing tips, software that can help you explain difficult concepts to clients more effectively, ways you can securely share documents with clients and opposing counsel, and more!

Paul J. Unger, Esq.; Affinity Consulting Group; Columbus

Barron K. Henley, Esq.; Affinity Consulting Group; Columbus

Brett Burney; Burney Consultants, LLC; Chagrin Falls

Danielle DavisRoe, Esq.; Affinity Consulting Group; Columbus

10:30 Break

10:45 BREAKOUT SESSIONS

(1) How to Use Acrobat and Nuance PowerPDF in the Law Office

PDFs are the stuff of which paperless offices are made. It follows that moving beyond the basics of your PDF software can reap great rewards. In this power-session, we will highlight the awesome legal-specific features of both Adobe Acrobat and Nuance PowerPDF! Some topics include PDFing on a Tablet (iPad, Android or Windows machine), Bates Numbering, Redaction, E-Filing, Combining - Splitting - Manipulating PDFs, and all-important encryption/security!

Paul J. Unger, Esq.

(2) An Apple a Day Keeps the Lawyer Working Efficiently! How Macs, iPhones, and iPads can be Used Effectively in a Law Practice

Lawyers can use Macs too! In this session, Brett and Jeff, who are nationally recognized Mac lawyering experts, will review the latest essential Mac tools for legal professionals. They will discuss hardware choices and review legal-specific programs for practice management, time billing and accounting, document management, document automation and a number of practice-specific options.

Brett Burney and Jeffrey R. Schoenberger, Esq.

12:00 Lunch (Provided)

1:00 How to Manage Your Workload, Tasks and Time

Are emails and tasks overwhelming you? The average American worker switches tasks on the computer 564 times a day, and most legal professionals are processing 100 – 150 emails a day. We are sinking in information overload! This seminar will not only teach you how to manage your daily tasks and email, but you will also learn how to create an effective task tracking system to process all the to do's that we get through email, etc.

Paul J. Unger, Esq.

2:00 Addressing Security with Your Clients (Professional Conduct)

Addressing security within the firm is just half the battle! We can't forget about our clients. We need to educate our clients about proper security and process and make sure they are okay with the risks associated with electronic communication and storage. Nothing is without risk, but by exercising good practices and communication, you and your client can fully enjoy all the benefits of technology and electronic collaboration. In this session, we will have a sample engagement agreement that you can use as a starting point with your own clients, and address documents, portals, cloud and closing practices.

Barron K. Henley, Esq.

3:00 BREAK – Sponsored by Worldox

3:15 BREAKOUT SESSIONS

(1) E-Discovery Tools and Workflows for Mere Mortal Lawyers

Discovery has become so complex and challenging. Many litigators are familiar with traditional litigation support programs like Summation and Concordance. While still excellent tools, there are a number of cloud-based programs that may also be able to serve you needs very well at a very appealing cost. Learn about the latest support programs that can help you collaborate with your client and team, and just how easy they are to use. Our national E-Discovery expert will discuss all the tools available for collecting, processing and reviewing electronic evidence.

Brett Burney

(2) Still Not Using Office 365? Learn About its Essential Law Firm Tools

Microsoft offers a compelling combination of local software, document/email management and cloud services called Office 365. Explore the benefits of Office 365. Learn how it works, what it does best, and the different packages available. You'll soon see why Office 365 is rapidly taking over the legal market.

Barron K. Henley, Esq.

4:15 BREAKOUT SESSIONS

(1) Firm Technology Overhaul: Starting from Scratch or Starting Over

Getting the right technology for your practice shouldn't be a game of chance. It's too expensive and too important, but how do you avoid mistakes? What are best practices for law office accounting, legal case management, electronic file/document organization or generating complex documents? How do you pick the right computer when it's time to replace what you have? How should mobile devices factor into your practice? How can you access everything at the office when you're not at the office? What are the best "cloud" services for lawyers? This seminar will answer all of those questions and more. It provides a complete legal technology roadmap in plain English, covering all areas of law office technology and practice management. Stop letting technology just happen to you and take control. We'll show you how.

Barron K. Henley, Esq.

(2) The Best Mobile Apps – 45 Apps in 45 Minutes

Apps for legal professionals are constantly changing. In this fast-paced session, our speakers will cover the 45 greatest hits and latest hits that will maximize mobility from your iPhone or iPad!

Brett Burney and Jeffrey Schoenberger, Esq.

5:00 Day One Concludes

Social reception sponsored by the Ohio State Bar Association Solo, Small Firms and General Practice Section immediately follows.

DAY 2: WEDNESDAY, DECEMBER 12

8:55 Introduction/Welcoming

9:00 Cybersecurity Tips at Warp Speed for Lawyers (Professional Conduct)

Lawyers have an ethical duty to be competent and to keep their client data confidential. Clients, too, want to keep their confidential data protected. All too often, information security is not prioritized by law firm. It costs money to protect data, and businesses frequently resist budgeting for security, even though an ounce of prevention is far less expensive than a pound of cure. Investigating and remediating data breaches is hideously expensive, not to mention the necessity of complying with state data breach notification laws. But there are a host of free and budget-friendly tips.

Sharon D. Nelson, Esq.; President, Sensei Enterprises, Inc.; Fairfax, Virginia

John W. Simek; Vice President, Sensei Enterprises, Inc.; Fairfax, Virginia

10:30 Break

10:45 BREAKOUT SESSIONS

(1) Effective Cybersecurity Training for Law Firm Professionals

Phishing and phone scams have become globally epidemic. Organized crime groups around the world target you and your colleagues, attempting to gain access to financial accounts or hold your data for ransom. One click, and you, too can be a hostage. Education is the first step in abiding by your ethical duties and protecting your firm from phishing threats and other common cyber-attacks. Learn how attackers trick people into clicking on links and giving out information—and how you can implement an effective cybersecurity awareness program in your firm, including options such as awareness videos, realistic phishing tests, and more. This practical program will include tips to ensure your employees are educated and an effective part of your "human firewall."

Sharon D. Nelson, Esq. and John W. Simek

(2) Power Play! Playing with Word Styles to Improve your Documents

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. If you want to master Word, there are techniques you must learn and rules to follow, but none of them are ascertainable by simply using Word. This session will teach you exactly how to fix the common legal drafting problems plaguing you now and avoid them in the future. It's time to end your abusive relationship with Microsoft Word. We'll show you how.

Danielle DavisRoe, Esq. and Barron K. Henley, Esq.

12:00 Lunch (Provided) – Sponsored by Ohio Bar Liability Insurance Company



1:00 BREAKOUT SESSIONS

(1) Conducting an Incident Response from a Forensics Standpoint (1:00 – 3:00)

This presentation will look at the methodologies and techniques for conducting an incident response from the perspective of a forensic examiner. It looks at some foundational items such as why an IR examination is conducted, the kinds of evidence that are helpful, and legal and practical implications from a forensic standpoint. We explore the necessity of preserving evidence, tools and techniques for analyzing and interpreting the data and how to bring it all together into a process.

Damon S. Hacker; President and CEO, Vestige Digital Investigations; Medina

(2a) PowerPoint Power Hour (1:00 – 2:00)

PowerPoint's use in the legal profession, both in and out of the courtroom, has become nearly invaluable. This fast-paced session specifically focuses on the most useful and practical features of PowerPoint for legal professionals. Just a few of the ways in which PowerPoint can help legal professionals include opening statements and closing arguments in trial, presentations at mediation or arbitration, and presenting complicated legal concepts to clients so they can understand the legal issues involved in their matter. In this session, we will cover presentation tips and tricks, document callouts, using video and audio, and how to use and present from PowerPoint on an iPad.

Paul J. Unger, Esq.

(2b) Word Power Hour (2:00 – 3:00)

Due to the complex formatting often required with legal documents, most users find Microsoft Word to be frustrating. It's the primary tool used to produce work product, yet many feel it works against them. We'll show you exactly how to fix the common legal drafting problems plaguing you now and avoid them in the future. You'll learn dozens of tips and techniques you can put into practice immediately. Even if you feel you have Word under control, we guarantee you will learn new things about Word throughout this class.

Barron K. Henley, Esq.

3:00 BREAK

3:15 BREAKOUT SESSIONS

(1) Insuring Against Cybersecurity Attacks (Professional Conduct)

This hour will look at the ethical steps lawyers can take and the policies that can provide coverage in the event of a data breach cyberattack.

Gretchen Koehler Mote, Esq.; Director of Loss Prevention, Ohio Bar Liability Insurance Company; Columbus

(2) Outlook Power Hour: Maximize the Utility of Microsoft Outlook

In this fast-paced session, our panel will show you there is way more to Outlook than just sending and receiving email. Learn how to maximize the use of Outlook with shortcuts, quick steps, rules, integrated tasks, calendar, contacts, notes, and much, much more.

Paul J. Unger, Esq.

4:15 Institute Concludes

HOW TO REGISTER

Online: youosba.Ohiobar.org

Phone: (800) 232-7124 | (614) 487-8585

Mail To:

Ohio State Bar Association
 P.O. Box 16562 Columbus, OH 43216-6562

Cancellation Policy: Cancellations received by 5 p.m. the business day prior to the program will be refunded less a \$50 processing fee.



Register for this course: ohiobar.org/CLE18-101



Register for this course: **(800) 232-7124**

REGISTRATION FORM & TUITION ON BACK