



PRACTICE
360^o **A DAY FOR**
LAWYERS & LAW FIRMS

Presented by the Award-Winning D.C. Bar
Practice Management Advisory Service

Friday, September 18, 2020
8:30 a.m.-4 p.m.

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A Welcome Message from Rochelle D. Washington, D.C. Bar Practice Management Advisor



Thank you for joining us at the 6th annual Practice 360°| A Day for Lawyers & Law Firms, offered this year in a new online format. We look forward to providing you with the same high-quality content as we have for our past in-person events. Today's programs will provide you with information to improve the way you work and provide legal services to the community. You will hear from experienced industry leaders, practicing attorneys and experienced professionals on topics covering law firm innovation, ethics, wellness, and marketing.

A virtual vendor hall will be available throughout the day to provide conference attendees with a unique remote experience. You will be able to link directly to vendor representatives in dedicated Zoom videoconference rooms and/or schedule a time to connect to get more information on their products and services. Be on the lookout for special offers!

Rochelle D. Washington

Rochelle D. Washington is a practice management advisor in the Practice Management Advisory Service (PMAS) of the D.C. Bar. She, along with practice management advisor Daniel M. Mills, assists lawyers with the business of starting and managing a law firm. She was recognized by the ABA Legal Technology Resource Center as a 2017 Woman of Legal Tech and by Fastcase as a 2017 Fastcase 50. Rochelle develops and manages the annual D.C. Bar all-day educational event, Practice 360°| A Day for Lawyers & Law Firms and the Small Firm Lunch and Learn program series.

Ms. Washington and Mr. Mills co-lead *Basic Training & Beyond*, a two-day, monthly, free program for small firm lawyers in D.C. and the annual multi-session *Successful Small Firm Practice Course*, an in-depth multi-part exploration of starting and growing a small firm. Both programs are past recipients of the ABA Gambrell Award for Professionalism.

Innovating in the New Normal

A fireside chat with Jack Newton and Ed Walters

Hosted by Darrin Sobin of the DC Bar

Friday, September 18 from 2 - 3 p.m.

In this fireside chat with industry experts, attendees will learn how to run a successful virtual practice in the "New Normal."

We'll cover:

- ✓ Legal trends surrounding COVID-19
- ✓ How to market your firm in 2020
- ✓ How to recover more billable time
- ✓ How to automate your practice
- ✓ The cloud-based law firm



Clio and Fastcase are both member benefits of the DC Bar

Sponsored Events

8:30 a.m. - 9:20 a.m.

Join Claude Ducloux for the morning plenary session, Resilience Training: Performance Skills for a Better Practice and Better Life, sponsored by LawPay.



9:20 a.m. - 10:20 a.m.

Practical Applications of Accounting and Statistics to Help You Manage Your Legal Practice Better, sponsored by Berkeley Research Group (BRG).



11:30 a.m. - 12:30 p.m.

The Path to a Paperless Practice Using PDF, sponsored by Foxit Software.



1:00 p.m. - 2:00 p.m.

During your lunch hour you will hear from Jack Newton, CEO of Clio for his discussion on The Client-Centered Law Firm: How to Succeed in an Experience-Driven World, sponsored by Clio.



2:00 p.m. - 3:00 p.m.

Participate in a live discussion with Jack Newton of Clio, Ed Walters of Fastcase and Darrin Sobin with the D.C. Bar on Innovating in the New Normal, sponsored by Clio and Fastcase.



3:00 p.m. - 4:00 p.m.

Malpractice and Cybersecurity Insurance: Practical Considerations, sponsored by USI Affinity.



The Top Law Firm Marketing Myths that are Holding Your Firm Back, sponsored by GNGF.



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Schedule of Events

TIME	Practice 360° A Day for Lawyers & Law Firms			
8:30 a.m.	<p style="text-align: center;">Resilience Training: Performance and Interpersonal Management for Better Practice and Better Life (8:30 - 9:20 a.m.)</p>			
9:00				
9:30	<p>Avoiding the Ethical Traps that Lurk in Your Files (CLE)</p> <p style="text-align: center;">(9:20 a.m. - 10:20 a.m.)</p>	<p>5 Reasons Lawyers Make Bad Business Owners...</p> <p style="text-align: center;">(9:20 a.m. - 10:20 a.m.)</p>	<p>Online Marketing: You're Doing it All Wrong</p> <p style="text-align: center;">(9:20 a.m. - 10:20 a.m.)</p>	<p>Practical Applications of Accounting and Statistics...</p> <p style="text-align: center;">(9:20 a.m. - 10:20 a.m.)</p>
10:00				
10:30		<p>How Stay at Home Solos Build Thriving Firms...</p> <p style="text-align: center;">(10:30 a.m. - 11:30 a.m.)</p>	<p>AI, Legal, and the Changing Business of Law</p> <p style="text-align: center;">(10:30 a.m. - 11:30 a.m.)</p>	<p>iPhone Forensics: An Update on Capabilities from the Trenches</p> <p style="text-align: center;">(10:30 a.m. - 11:30 a.m.)</p>
11:00				
11:30	<p>Contract, Of Counsel, Co-Counsel, Oh My... (CLE)</p> <p style="text-align: center;">(11:30 a.m. - 12:30 p.m.)</p>	<p>Virtual Law Firm Logistics: The Blueprint for Online Success</p> <p style="text-align: center;">(11:30 a.m. - 12:30 p.m.)</p>	<p>Increase Revenue Through Better Billing & Collections Practices</p> <p style="text-align: center;">(11:30 a.m. - 12:30 p.m.)</p>	<p>The Path to a Paperless Practice Using PDF</p> <p style="text-align: center;">(11:30 a.m. - 12:30 p.m.)</p>
12:00 p.m.				

Schedule of Events

TIME	Practice 360° A Day for Lawyers & Law Firms			
12:30 p.m.	Session Break (12:30 p.m. - 1:00 p.m.) - Vendor Hall will remain open			
1:00	The Client Centered Law Firm: How to Succeed in an Experience-Driven World 1:00 p.m. - 2:00 p.m.			
1:30				
2:00	Running on Empty: Preventing Burnout in the Legal Profession	Innovating in the New Normal (2:00 p.m. - 3:00 p.m.)	Automation and Marketing Your Law Practice, from the Trenches (2:00 p.m. - 3:00 p.m.)	Are You Lawyering or Laboring? 7 Steps to Reduce Interruptions and Chores (2:00 p.m. - 3:00 p.m.)
2:30	(2:00 p.m. - 3:00 p.m.)			
3:00	Red Flags, Guardrails, and Hard Stops... (CLE)	Fireside Chat with Seth Price: Growth Strategies for the Small Firm Lawyer	The Top Law Firm Marketing Myths that are Holding Your Firm Back (3:00 p.m. - 4:00 p.m.)	Malpractice and Cybersecurity Insurance: Practical Considerations (3:00 p.m. - 4:00 p.m.)
3:30	(3:00 p.m. - 4:00 p.m.)	(3:00 p.m. - 4:00 p.m.)		
4:00	Thank you for joining us!			

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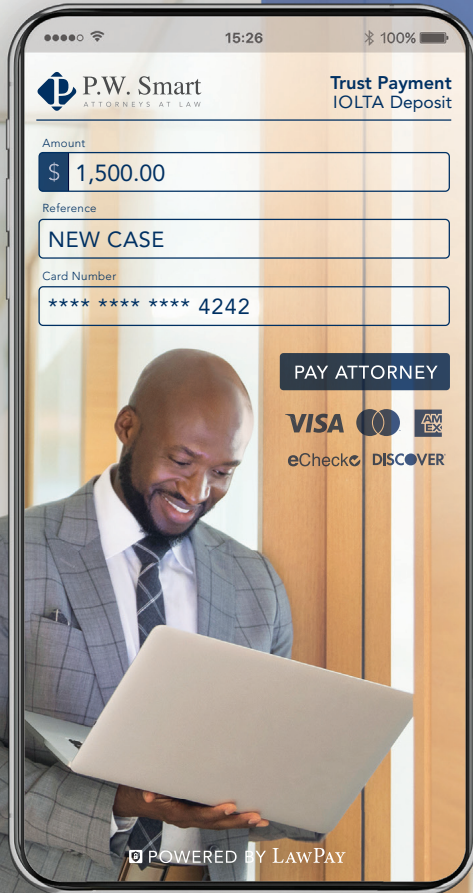
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8:30 a.m. – 9:20 a.m.

Resilience Training: Performance Skills for a Better Practice and Better Life

Presenter: Claude Ducloux, LawPay

For too many attorneys the stress of practicing law has led to depression and problematic behaviors. But why can some lawyers handle the stress while others cannot? Using the practices and strategies found in the U.S. Army's Master Resilience training program, Mr. Ducloux will pass on techniques and illustrations of behaviors which can increase optimism, self-regulation, and strengths as a lawyer. You will learn the mental processes which allow you to endure the setbacks in life and practice and come back stronger than ever. We'll discuss attitude, mental balance, emotional intelligence, and strategies to help you when you're feeling overwhelmed. Using these skills may lead to a better work-life balance.

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9:20 a.m. – 10:20 a.m.

Avoiding the Ethical Traps that Lurk in Your Files (CLE)

Presenters: Dan Schumack, Schumack Law Firm PLLC; Hope Todd and Erika Stillabower, D.C. Bar Legal Ethics Program

Credit: 1.0 Ethics Credit Hour

Course Level: Intermediate

This course explores ethical responsibilities and malpractice risks associated with the ways in which lawyers manage their files during and after the lawyer-client relationship. Topics will include maintaining confidentiality under Rule 1.6 for physical and cloud-based data; extra requirements for trust account records under Rule 1.15(a); obligations under Rule 1.16(d) for file transition to successor counsel; and Rule variances between the District, Maryland, and Virginia.

9:20 a.m. – 10:20 a.m.

5 Reasons Lawyers Make Bad Business Owners and How Technology Can Help You Be Better

Presenter: Erica Birstler, CosmoLex

Running a small law firm requires that you be more than just a good lawyer. You are also required to be a smart businessperson. This means that managing a successful law office often involves wearing the hats of many roles—accountant, billing manager, client relations manager, and more—all while providing your client with the best possible service. It can be a lot to handle, and there are many reasons that lawyers make bad business owners, but that does not have to be you! Learn how to leverage modern technology and efficient processes to run a more productive and profitable law firm.

9:20 a.m. – 10:20 a.m.

Online Marketing: You're Doing it All Wrong

Presenter: Conrad Saam, Mockingbird Marketing

Lawyers typically work really hard.... on the wrong things. During this session, we reveal many ways in which lawyers waste time and money chasing the latest technical shiny object while ignoring tried and true (and often cheap) marketing tactics. This session is focused on the DIYer or the lawyer responsible for actively managing a firm.

9:20 a.m. – 10:20 a.m.

Practical Applications of Accounting and Statistics to Help You Manage Your Legal Practice Better

Presenters: Paul Diver and Deepa Sundararaman, BRG

Statistics and accounting can be intimidating for many people, but routinely play important roles in many legal settings. The jargon can seem overwhelming and make it difficult even for an interested learner to know where to start. BGR's faculty of experienced practitioners will demystify several key

concepts and provide you with a solid foundation to help you understand and converse in both disciplines, including:

- Breaking down some commonly used accounting terminology
- Components of Financial Statements
- All about Costs
- The definition and use of Present Value
- Core summary statistics (mean, median mode, standard deviation)
- The definition and use of statistical significance and statistical hypothesis testing
- The definition and interpretation of statistical confidence intervals and margins of error
- The basics of regression analysis
- They will break down each concept with clear examples, address frequently asked questions, and address several key pitfalls and mistakes made even by some of the most experienced lawyers.



10:30 a.m. – 11:30 a.m.

How Stay at Home Solo Attorneys Build Thriving Firms with Technology and Freelance Lawyers

Presenter: Kristin Tyler, LAWCLERK

Whether your goal is to build a lifestyle law firm or spend more time with your children, building a thriving practice is more attainable than ever before. Recent advancements in legal technology and regulatory changes regarding a new category of providers—paraprofessionals—offer tremendous opportunities for growth. In this session, we will provide an overview of the fastest growing business model for solo attorneys, best practices, and resources to help get you started.

Clear perspectives that you can count on.

With a team of industry specialists and world-class experts in accounting, business intelligence, damages analysis, economics, finance, intellectual property, valuation, data analytics, statistics, and strategic analysis, BRG's Disputes & Investigations practice is a leader in the areas that can most significantly impact business. We are dedicated to providing clear perspectives that help clients understand their current situation as well as the road ahead.

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10:30 a.m. – 11:30 a.m.

AI, Legal, and the Changing Business of Law

Presenter: Andrew Arruda

Mr. Arruda will explore the history of AI (as well as several misconceptions regarding its development), before providing a modern, up-to-date definition of what constitutes AI in 2020. From there, he will explore examples of AI in practice, through real world applications of the technology across multiple industries before examining the implications of AI for law and providing a live demonstration of their legal research technology. Finally, he will conclude the presentation with a discussion of where the legal industry is headed and what role AI will play in the future.

10:30 a.m. – 11:30 a.m.

iPhone Forensics: An Update on Capabilities from the Trenches

Presenters: Michael C. Maschke and Brandon Barnes, Sensei Enterprises

Year after year, Apple continues to release new hardware models and updates to its iOS operating system. Digital forensic capabilities have grown over time and now we are able to recover more data than ever that may be vital to your case. Come learn about some of the new types of information that forensics can uncover, along with updates on capabilities to recover communications and other important user generated data.

Seminars

11:30 a.m. - 12:30 p.m.

Contract, Of Counsel, Co-counsel, Oh My: The Ethics of Working with “Outside” Lawyers (CLE)

Presenters: Dan Schumack, Schumack Law Firm PLLC; Hope Todd and Erika Stillabower, D.C. Bar Legal Ethics Program

Credit: 1.0 Ethics Credit Hour

Course Level: Intermediate

This course will explore the myriad ethical issues and mandatory obligations that can arise when a lawyer works with another lawyer who is “outside” of the lawyer’s firm. Such relationships may be formed with contract lawyers, lawyers who are “of counsel” to a firm or in co-counsel relationships. Ethical issues include when and to what extent a lawyer must inform a client that another lawyer is working on the client’s matter (Rule 1.4), when conflicts of interest impute (Rule 1.10), how the firm or outside lawyer may hold themselves out to the public (Rules 7.1/7.5), fee agreements (1.5), referral fees (7.1) and more. Knowledgeable ethics lawyers will discuss how ethical duties vary depending on the nature and scope of the relationship and other practical considerations when forming such relationships.

11:30 a.m. - 12:30 p.m.

Virtual Law Firm Logistics: The Blueprint for Online Success

Presenter: Nakia Gray, Gray Legal, P.C.

During this session, Ms. Gray will give you the blueprint for launching and growing a virtual law practice. She will discuss must-have technology and software, how to hire virtual staff to give you more freedom, and ways you can increase your profitability.

11:30 a.m. - 12:30 p.m.

Increase Revenue Through Better Billing & Collections Practices

Presenter: Geoff Gilbert, Coach for Executives

As lawyers, we habitually let clients get away with not paying their bills on time. Learn how to change this so that your bill becomes your client’s priority. This is an important way to immediately increase revenue and add to the value of your practice.

11:30 a.m. - 12:30 p.m.

The Path to a Paperless Practice Using PDF

Presenter: Mike Bigelow, Foxit Software

With 2020 forcing firms to acknowledge the need for and benefits of a paperless law office, many lawyers face a technological reckoning. Whether dealing with the headaches of reconciling a dozen different systems or feeling beleaguered by the investment of time and energy needed to learn new software, overwhelmed lawyers could use some quick wins to adapt to the “new normal.” This session will introduce ways to get more productivity out of one program: your PDF editing software. Already the standard format for courts around the world, you can do more with PDFs than just e-filing:

- Redacting information and metadata
- Compressing file sizes for archiving
- Commenting and collaborating on documents
- Creating bookmarked tables of contents
- Assembling cases and evidence for quick reference

- Bates numbering
- Creating presentations and exhibits that display the same across devices
- Intake and other interactive forms
- Electronic and digital signatures
- Document management integration
- Convert documents to searchable OCR



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Do More With Documents

12:30 p.m. – 1:00 p.m.

SESSION BREAK

Visit with our sponsors in their virtual booths to learn more about how you can leverage their products and services for your firm.

Access provided via navigation pane of program window.

1:00 p.m. – 2:00 p.m.

The Client-Centered Law Firm: How to Succeed in an Experience-Driven World

Presenter: Jack Newton, Clio

The legal industry has long been risk averse, but when it comes to adapting to the experience-driven world created by companies like Netflix, Uber, and Airbnb, adherence to the old status quo could be the death knell for today's law firms.

In *The Client-Centered Law Firm*, Clio co-founder Jack Newton offers a clear-eyed and timely look at how providing

a client-centered experience and running an efficient, profitable law firm aren't opposing ideas -- with this approach, they drive each other. Covering the what, why, and how of running a client-centered practice, with examples from law firms leading this revolution, as well as practical strategies for implementation, the *Client-Centered Law Firm* is a rallying call to unlock the enormous latent demand in the legal market by providing client-centered experiences, improving internal processes, and raising the bottom line.



2:00 p.m. – 3:00 p.m.

Running on Empty: Preventing Burnout in the Legal Profession

Presenter: Niki Irish, D.C. Bar Lawyer Assistance Program

The World Health Organization defines burnout as a syndrome “resulting from chronic workplace stress that has not been successfully managed.” The primary symptoms include persistent exhaustion, feeling negative towards one’s career, and reduced productivity. Does this speak to you? If so, please join us for a discussion exploring the concept of burnout and its effects on the mind, body and relationships. This program will help you gain a better understanding of strategies used to prevent, respond to and recover from burnout.

2:00 p.m. – 3:00 p.m.

Innovating in the New Normal

Presenters: Jack Newton, Clio; Ed Walters, Fastcase; Darrin Sobin, District of Columbia Bar

Join us for this live program where we will discuss:

- Legal Trends
- Marketing your firm in 2020
- Recovering more billable time
- Automating your practice
- The Cloud-based law firm



2:00 p.m. – 3:00 p.m.

Automation and Marketing Your Law Practice, From the Trenches

Presenters: Ada Chan and Mark Rollins, Rollins and Chan Law Firm

Many small law firms have not changed with the times. There has been a revolution in the practice of law which requires lawyers to be efficient while increasing productivity. Small modern law practices need to focus on the cost of legal research, cloud computing, advertising costs, and the automation of the practice of law. This program will focus on developing and maintaining a small modern law practice to suit the modern-day client by using customer relations management software integrated with case management software.

2:00 p.m. – 3:00 p.m.

Are you Lawyering or Laboring? 7 Steps to Reduce Interruptions and Chores

Presenter: Maddy Martin, Smith.ai

Participants will learn seven techniques for incorporating tools that promote professionalism and productivity into their operations with minimal investment of time, energy, and money:

- Route inbound phone & email communications
- Limit calls & emails with web chat & texting apps
- Automate lead capture & qualification
- Hand-off new client intake
- Streamline appointment scheduling & reminders
- Facilitate payments to increase realization
- Systematically refer “bad” leads and generate high-quality referrals

3:00 p.m. – 4:00 p.m.

**Red Flags, Guardrails and Hard Stops:
Navigating Lawyer Ethics with Difficult Clients
(CLE)**

Presenters: Dan Schumack, Schumack Law Firm PLLC;
Hope Todd and Erika Stillabower, D.C. Bar Legal Ethics
Program

Credit: 1.0 Ethics Credit Hour

Course Level: Intermediate

This course will address the ethical issues that may arise when dealing with “difficult” clients. Such clients may include those who want to engage in “shady” ventures; possess alternative facts after the fact; want to be the lawyer; suddenly remember material facts; require the lawyer to remain silent about material facts; and/ or acquire evidence from questionable sources. This course will explore the tensions between duties owed to clients (diligence, zealousness, confidentiality) and duties owed the tribunal (candor, meritorious claims); third parties (truthfulness, respect for legal rights); and the rule of law and the administration of justice. Knowledgeable faculty will use hypothetical scenarios to identify competing ethical duties and how the ethics rules guide and limit lawyers when

their clients present ethically challenging behavior. The course will also discuss situations that require or permit lawyers to withdraw from representation pursuant to Rule 1.16 when a client goes off the rails.

3:00 p.m. – 4:00 p.m.

**Fireside Chat with Seth Price: Law Firm Growth
Strategies for the Small Firm Lawyer**

Presenter: Seth Price, Price Benowitz LLP and Daniel M.
Mills, D.C. Bar Practice Management Advisory Service

Seth Price answers common questions on operations, management, and marketing strategies law firm owners face on a daily basis. Get the inside scoop on best practices for building a strong intake and support team; hiring, firing and cultivating a culture where A+ players want to work; and marketing strategies that fit your management style and business model in order to take your firm to the next level.

3:00 p.m. – 4:00 p.m.

The Top Law Firm Marketing Myths that are Holding Your Firm Back

Presenter: Mark Homer, GNGF

Like a horde of zombies, some law firm marketing myths just will not die. Learn the top law firm marketing myths that you have been led to believe, why you should ignore them, and what you should be doing to propel your law firm forward in 2020.



3:00 p.m. – 4:00 p.m.

Malpractice and Cybersecurity Insurance: Practical Considerations

Presenter: Mark LeFever, USI Affinity

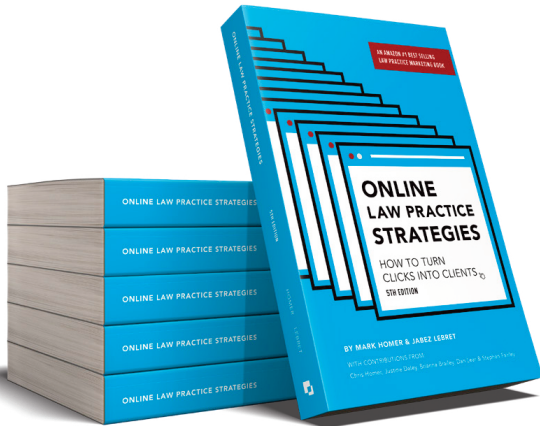
Selecting malpractice coverage is important for lawyers in a firm of any size. How much coverage is needed? How much should it cost? How does the cost of defense affect the premium and coverage? How can a fee dispute affect coverage? What happens if the lawyer changes providers? What is cyber coverage? This informative program will explore these topics and other issues such as: where malpractice claims originate; malpractice insurance policies; how to determine appropriate coverage; and selecting a carrier, policy, and broker.



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Andrew Arruda is a Canadian entrepreneur and attorney. He is the chief executive officer and co-founder of the artificial intelligence company ROSS Intelligence, a leader in the legal technology industry. Mr. Arruda speaks internationally on the subjects of AI, legal technology, and entrepreneurship and has been featured in publications such as *The New York Times*, *BBC*, *Wired*, *CNBC*, *CBS*, *Bloomberg*, *Fortune*, *Inc.*, *Forbes*, *TechCrunch*, *the Washington Post*, and the *Financial Times*. A TED speaker and member of the *Forbes* 30 under 30 class of 2017, Mr. Arruda aims to forever change the way legal services are delivered. Prior to cofounding ROSS Intelligence, he worked at a Toronto litigation boutique and with the Canadian Department of Foreign Affairs, Trade, and Development in Lisbon, Portugal. Mr. Arruda is a proud board member of the Institute for the Advancement of the American Legal System (IAALS) and also served as the subcommittee chair on the State Bar of California's Task Force on Access Through Innovation of Legal Service (ATILS).



Brandon Barnes is a digital forensics examiner at Sensei Enterprises, Inc. and specializes in electronic evidence analysis, data recovery, and forensic reporting. He is an EnCase Certified Examiner (EnCE). He's from Pennsylvania, where he received his Bachelors of Science in Digital Forensics at Bloomsburg University. He can be reached at bbarnes@senseient.com.



Mike Bigelow spent more than a decade working in New York and California firms of all sizes doing everything from personal injury to criminal defense to participating in the world's biggest antitrust suit. He then undid all the progress he'd made on his law school student loans when he got an MBA to help him better serve small firms for several years as a business consultant and legal technology enthusiast. These days, he is the PhantomPDF product marketing manager for legal and courts at Foxit Software.

Featured Speakers



Erica Birstler is the vice president of CosmoLex—developers of the only fully integrated legal practice management, billing & trust accounting system specifically designed for solo and small law firms. Ms. Birstler’s degree is in Business Administration and she has nearly a decade of experience in the legal

software industry, catering to the specialized technology needs of small to mid-sized law firms. She is passionate about helping legal professionals improve the way their law firms run and she has given numerous presentations across North America on legal technologies such as law practice technology management, cloud computing, and legal billing & trust accounting compliance to help spread her knowledge.



Ada Chan, Esq. came to the United States for college and has been here ever since. She is a native of Hong Kong and is fluent in Cantonese. Ms. Chan began her legal career as an immigration attorney in 1996 handling a variety of cases, including H-1B visas, Labor Certification, Political Asylum, Adjustment of

Status, K visas, removal of conditional status, petition for relatives and naturalization petitions. In 1998 she formed a law partnership with Mark M. Rollins, creating the Rollins and Chan Law Firm.



Paul Diver, Ph.D., is an associate director in Berkeley Research Group's (BRG) Washington, D.C., office. He holds a Ph.D. in Statistics, a Masters in Mathematics and Statistics, and a Masters in Economics. Dr. Diver has provided statistical and economic analysis pertaining to horizontal and vertical competition, intellectual

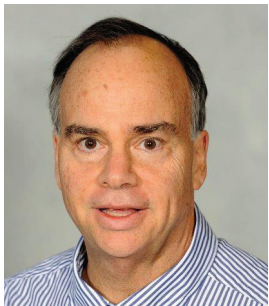
property, and damages matters heard before federal and state courts, administrative law judges, and regulatory commissions. He has also provided consulting services for clients across a wide variety of industries including healthcare, automotive, telecommunications, luxury goods, and waste collection and disposal. Dr. Diver has applied statistical and econometric techniques in solving complex problems, including regression analysis, cluster and classification analysis, and comparative studies analysis. Dr. Diver has also developed complex sampling designs, drawn samples, and evaluated the statistical validity of samples and their associated extrapolations for clients.



Claude E. Ducloux, Esq. is an attorney licensed in Texas, Colorado and California and speaks regularly on legal ethics, law office management, and trial-related topics. Mr. Ducloux has a long legacy of bar service, and on January 1, 2018, was appointed by the Supreme Court of Texas to a 3-year term on the Supreme Court

Committee on Disciplinary Rules & Referenda. He is Board Certified in both Civil Trial Law and Civil Appellate Law by the Texas Board of Legal Specialization. During his 40+ year career, Mr. Ducloux has received the State Bar of Texas' highest awards for CLE, legal ethics, professionalism, pro bono, and public service. He has written more than 150 articles on ethics, law office management, and practice skills and has been invited to speak in more than 250 programs since January 1, 2016.

Featured Speakers



Geoffrey Gilbert, Esq. coaches lawyers, accountants and c-level business executives in how to be more effective in their businesses. Before that, he practiced law for 15 years. During his time practicing law, he built his own firm and represented 650 physicians and dentists. He later coached many of these professionals

to assist with managing employees and with practice and business decisions.

Prior to practicing law, he practiced as a CPA for six years including working in the tax departments of Ernst & Young and Laventhol & Horwath, both national accounting firms. While a full-time CPA, he attended law school at night, so he knows what it is like to juggle an impossible schedule. He learned how to focus on what's important.



Nakia Gray, Esq. is a multi-faceted attorney and business strategist who leverages her expertise in branding and marketing to create profitable and protected brands for hard-working entrepreneurs. An out-of-the-box thinker with an unwavering passion for empowering others to protect what matters most to them, she owns and operates Gray Legal, P.C. - a modern and innovative law firm uniquely designed for digital entrepreneurship.



Mark Homer is CEO of GNGF, a leading law firm marketing agency. At GNGF, he leads the team to help empower and educate law firms to grow their practice. He is co-author of "Online Law Practice Strategies" and often speaks around the U.S. on marketing and social media ethics for law firms. Download GNGF's latest guide, "Know Your Legal Marketing ROI," [here](#). Follow him [@mark_homer](#).



Niki L. Irish, LICSW is the education/outreach specialist for the D.C. Bar Lawyer Assistance Program. She has over ten years' experience in counseling and mental health. She has a B.S. in Psychology and Family Studies from Stevenson University (formerly Villa Julie College) and an MSW from the University of

Maryland School of Social Work, with a concentration in Employee Assistance Programs.



Mark Lefever is a vice president of Sales and Client Management for USI Affinity. He is primarily responsible for clients in Pennsylvania, Texas and Washington, D.C. With 12 years of experience in the insurance industry, Mr. Lefever has extensive knowledge on many different insurance programs. Prior to joining

USI Affinity he worked for American Income Life where he gained experience in several different roles. Most notably, Mr. Lefever was a supervising agent and oversaw a team of sales

representatives. In this role he oversaw the interviewing of potential hires and training of new hires on American Income Life's products. In addition, he was responsible for the Life and Health program for Pennsylvania.

Mr. Lefever frequently speaks at Pennsylvania and Philadelphia Bar Association events, and other local Pennsylvania Bar Association events on avoiding malpractice claims and the importance of insurance in the legal industry.

Mr. Lefever has a Life and Health Insurance License as well as a Property and Casualty License in Pennsylvania. He also holds many non-resident producer licenses for various other states. He graduated from The University of Pittsburgh with a Bachelors Degree in Political Science.

Featured Speakers



Maddy Martin is the head of growth and education for Smith.ai, which provides law firm communication services, including their virtual receptionist and intake service, web chat, and Keypad cloud phone system. She has spent the last decade growing tech startups from New York to California, and has expertise in digital

marketing, small business communications, lead conversion, email marketing, SEO & content marketing, social media, comarketing, affiliate programs, and event marketing.

Ms. Martin is a sought-after speaker on law practice management, law firm responsiveness, professional responsibility, technology and automations, and ethics, especially related to marketing, digital media, and client communications via phone, email, SMS, and website chat.

She has taught CLE courses, both independently and jointly with attorneys, for the Minnesota Bar, Minnesota CLE, Chicago Bar, Illinois Institute of CLE, Lawline, Lorman, ProLaw CLE, and many other highly regarded institutions serving attorneys.



Michael Maschke is the chief executive officer at Sensei Enterprises, Inc. Mr. Maschke holds a degree in telecommunications from James Madison University. He is an EnCase Certified Examiner (EnCE), a Certified Computer Examiner (CCE #744), a Certified Ethical Hacker (CEH), an AccessData Certified Examiner (ACE), and a Certified Information Systems Security Professional (CISSP).

Mr. Maschke is an associate member of the American Bar Association and has spoken at the American Bar Association's TECHSHOW conference on the subject of cybersecurity. He is currently an active member of the ABA's Law Practice Division: Technology Core Group and is on the Fairfax Law Foundation Board of Directors. Mr. Maschke is a 2019 Fastcase 50 award recipient. He is also a co-author of Information Security for Lawyers and Law Firms, (American Bar Association, 2006) and The 2008-2020 Solo and Small Firm Legal Technology Guides (American Bar Association, 2008 – 2020).



Daniel M. Mills, Esq. is a practice management advisor at the D.C. Bar. Dan helps lawyers with the business of their law office. He is a member of the D.C. Bar. Mr. Mills co-leads *Basic Training & Beyond*, a two-day, monthly, free program for small firm lawyers in the District. The program received the ABA's Gambrell Award

for Professionalism in 2011. He co-leads the annual multi-session *Successful Small Firm Practice Course*, an in-depth multi-part exploration of starting and growing a small firm. The course received the ABA Gambrell Award in 2015. Mr. Mills shares presentation of these programs with Rochelle D. Washington, also a practice management advisor at the D.C. Bar.

Since joining the D.C. Bar in 2008, he has helped hundreds of lawyers transition into small firm practice. He speaks and writes regularly about ethics and fee agreements, ethics and trust accounts, IOLTA, flat fees and advance fees, the characteristics of the small firm attorney, launching a practice in today's economy, marketing, social media, planning, productivity, and the lawyer as entrepreneur.



Jack Newton is the CEO and co-founder of Clio and a pioneer in cloud-based legal technology. He has spearheaded efforts to educate the legal community on the security, ethics, and privacy issues surrounding cloud computing, and is a nationally recognized writer and speaker on these topics. He co-founded and is President

of the Legal Cloud Computing Association (LCCA), a consortium of leading cloud computing providers with a mandate to help accelerate the adoption of cloud computing in the legal industry, and is the author of *The Client-Centered Law Firm*, a bestseller that's helping law firms thrive in today's experience-driven era.

Mr. Newton has been recognized as EY's Entrepreneur of the Year, and Clio has been recognized with many national and international awards for its culture, management, customer support and rapid growth rate, including Deloitte's Best Managed Companies, Deloitte's Technology Fast 50, and Canada's Most Admired Corporate Cultures. Mr. Newton was also named a 2019 Fellow to the College of Law Practice Management and he sits on the board of ROSS Intelligence, an AI-powered legal research provider, and is an investor and advisor to early-stage legal tech startups. You can connect with him on twitter at @jack_newton.

Featured Speakers



Seth Price, Esq. is an accomplished attorney and transformational thought leader. He is a founding partner and the business backbone of Price Benowitz LLP as well as the founder and CEO of BluShark Digital. Mr. Price took a two- person law firm and scaled it to 36 lawyers in less than a decade. Now he has taken the same

digital power that built the firm to create a best in class digital agency focused on the legal sector in BluShark Digital.

Mr. Price has been a frequent lecturer and moderator at some of the largest and most influential law conferences in the United States, speaking on the tools and strategies law firms can use to align their business development with changing consumer habits. He has spoken on topics including but not limited to, how to build a firm, ethics, best practices for firm operations, search engine optimization (SEO), and digital marketing .



Mark Rollins, Esq. began his career as a Covington and Burling Westwood Fellow with Neighborhood Legal Services. Immediately after his fellowship ended in 1997, he started to pursue his passion as a criminal defense lawyer. Mr. Rollins is a member of the Federal court of District of Columbia and the State

of Maryland. He has tried over 60 criminal jury trials and thousands of criminal bench trials. He has been on the Criminal Justice Act Panel since 1997. In 1998 Mr. Rollins formed a law partnership with Ada Chan, creating the Rollins and Chan Law Firm.



Conrad Saam is the founder of Mockingbird Marketing– an agency delivering advanced online marketing exclusively for the legal industry. He is one of 34 Google Small Business Advisors with a focus on SEO and PR. Prior to Mockingbird, Mr. Saam architected Avvo's ascendancy from concept to legal directory market

leader through advanced SEO strategy. He previously ran the marketing team for the widely popular restaurant app, Urbanspoon. He is a frequent guest speaker at Local U, a panelist of David Mihm's Local Search Ranking Factors survey, a frequent speaker on search – including at Mozcon, SMX, SearchFest and Pubcon. He was an early contributor to Search Engine Land's In-House column, has been featured in *USA Today*, the *New York Times* and the *Huffington Post* and is the author of *The FindLaw Jailbreak Guide*. Mr. Saam holds an MBA from the Ross School of Business at the University of Michigan and tweets @conradsaam.



Dan Schumack, Esq. has presented more than a dozen different ethics-focused continuing legal education courses at the D.C. Bar since 2006.

He represents lawyers who need Bar complaint defense in the District, Virginia, or Maryland; law firm partnership agreements (and unwinds); law firm continuity/

succession planning; fee dispute arbitration or litigation; and private ethics advice. Mr. Schumack has been court-appointed in the District's disciplinary system to defend the interests

of lawyers who are allegedly incapacitated. He has also been appointed to liquidate the files and trust accounts of deceased or incapacitated lawyers.

Mr. Schumack is a member of the D.C. Bar's Legal Ethics Committee and the D.C. Bar's Communities [formerly Sections] Committee. He has also been serving as a civil motions conciliator in Fairfax Circuit Court for more than ten years.

Mr. Schumack has previously served as a hearing committee chair for the District of Columbia's Board on Professional Responsibility and as vice chair of the D.C. Bar's Rules of Professional Conduct Rules Review Committee. He has also served as: Secretary of the D.C. Bar's Board of Governors; a member of the D.C. Bar's CLE Committee; a member of the D.C. Bar's former Practice Management Advisory Service Committee; and as a member of the Board of Directors of the National Kidney Foundation of the National Capital Area. Mr. Schumack is a 1987 graduate of American University's Washington College of Law. He is a member of APRL (the Association of Professional Responsibility Lawyers) and is AV Rated by Martindale-Hubbell.

Featured Speakers



Darrin P. Sobin, Esq. is the Chief Programs Officer at the D.C. Bar, overseeing the Bar's Continuing Legal Education Program, Regulation Counsel (including Legal Ethics, the Practice Management Advisory Service, Lawyer Assistance Program, and Fee Dispute Program), as well as the Communities program.

He has an extensive background in legal ethics, commercial and intellectual property law, international banking law, and wrongful death litigation.

Mr. Sobin served as the District's first director of government ethics, overseeing the day-to-day operations of the Office of Government Ethics, which, under the Board of Ethics and Government Accountability, has oversight and enforcement authority of D.C. government officials and employees, nearly 34,000 in all, including the mayor and D.C. Council.

He also served in the D.C. Attorney General's office as a counselor of government ethics and legal ethics.

Mr. Sobin clerked for Judge June L. Green of the U.S. District Court for the District of Columbia, where he worked on cases

involving tobacco litigation, SEC actions, the Clean Water Act, and the Fair Labor Standards Act.

He also worked at the Office of Bar Counsel for the District of Columbia (now, the Office of Disciplinary Counsel) where he conducted preliminary reviews of attorney misconduct.

He is a graduate of the District of Columbia School of Law (now, the UDC David A. Clarke School of Law) and The George Washington University.



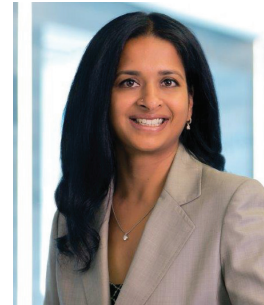
Erika Stillabower, Esq. is a senior legal ethics counsel at the District of Columbia Bar. Since 2013, she has provided guidance to members of the D.C. Bar seeking information on the interpretation and application of the D.C. Rules of Professional Conduct.

Ms. Stillabower contributes to columns on legal ethics that appear in the *Washington Lawyer* and regularly serves as faculty on MCLE accredited ethics courses. In addition, she provides staff support to the Legal Ethics Committee and the Rules of Professional Conduct Review Committee of the D.C. Bar. In

connection with her committee work, she assists in drafting informal chair letters and published Legal Ethics Committee opinions.

Ms. Stillabower previously spent eight years as an associate at a D.C. law firm, where her practice focused on white collar criminal defense and government litigation. In that capacity, she regularly represented clients from a variety of industries, including pharmaceuticals, manufacturing, and banking and financial services, before the United States Department of Justice and the Securities and Exchange Commission. She also developed experience in compliance counseling and the implementation of and adherence to corporate integrity agreements.

Ms. Stillabower graduated from Georgetown University Law Center, where she served as an associate editor of the Georgetown Law Journal.



Deepa Sundararaman, a director in Berkeley Research Group's (BRG) Washington D.C. office, focuses her practice in the areas of intellectual property and commercial litigation matters. She has significant experience performing complex financial and accounting analyses in the quantification of damages.

Her experience includes disputes brought to federal courts and matters brought before the U.S. International Trade Commission (ITC), and covers a range of disputes involving intellectual property, including allegations of patent and trademark infringement and misappropriation of trade secrets. Ms. Sundararaman is a Certified Public Accountant (CPA) and Certified Valuation Analyst (CVA). She has over seventeen years of experience providing accounting and consulting services to corporations, law firms, and government agencies. In addition to matters involving intellectual property and complex commercial litigation, her engagements have included business valuations, royalty investigations, bankruptcy investigations, regulatory compliance, and statutory audits. She holds an MBA from the University of Maryland, College Park.

Featured Speakers



Hope C. Todd, Esq. is the assistant director of Legal Ethics, Regulation Counsel, at the District of Columbia Bar. Since 2006, Ms. Todd has provided legal ethics guidance through the D.C. Bar's Ethics Helpline on the interpretation and application of the D.C. Rules of Professional Conduct. Ms. Todd regularly teaches

ethics CLEs and has served on panels for local, national and international audiences. She is a contributing author for the Ask the Ethics Experts and Speaking of Ethics features for the *Washington Lawyer*.

Ms. Todd is staff counsel to the D.C. Bar Rules of Professional Conduct Review and Legal Ethics Committees and also serves as a staff consultant to the Bar's Global Legal Practice Committee. Ms. Todd is a former member of the ABA Standing Committee on Ethics and Professional Responsibility (SCEPR) (2014 to 2017) and served as the SCEPR liaison to the ABA Commission on the Future of Legal Services. She is a member of the National Organization of Bar Counsel (NOBC) and participates on the NOBC subcommittee on Entity Regulation. She is a member of the Association of Professional Responsibility Lawyers (APRL) and the ABA

Center on Professional Responsibility. Before joining the D.C. Bar in 1998, Ms. Todd was in private practice in the state of New York. She is a graduate of the T.C. Williams School of Law at the University of Richmond, and holds a B.A. in public policy from the College of William and Mary.



Kristin Tyler, Esq. is co-founder of LAWCLERK and leads the marketing and business development efforts, with a focus on helping busy attorneys re-think their workflows. She helps attorneys be more productive and profitable and is committed to demonstrating that being a lawyer doesn't have to mean working insane

hours and missing out on time doing the things you enjoy with the people you love. Ms. Tyler has been practicing law for more than 10 years and has built a robust estate planning and probate practice. She is known for her work ethic, her integrity and her ability to connect people. As a partner of a mid-size law firm in fabulous Las Vegas, she understands the challenges that her fellow attorneys face in today's fast-paced, rapidly evolving legal industry.

Ms. Tyler has been designated an AV/Preeminent Attorney by Martindale-Hubbell and earned a Top 50 Women of the Mountain States Super Lawyers award in 2017 to 2019. She has been recognized as a Super Lawyer by the Mountain States Super Lawyers Magazine every year since 2014. She is active with several local community organizations and is dedicated to providing pro bono service.



Ed Walters is the CEO of Fastcase, a legal publishing company based in Washington, D.C. Fastcase is one of the world's fastest-growing legal publishers, serving more than 900,000 subscribers from around the world.

Before founding Fastcase, he worked at Covington & Burling, in Washington D.C. and Brussels, where he advised Microsoft, Merck, SmithKline, the Business Software Alliance, the National Football League, and the National Hockey League. His practice focused on corporate advisory work for software companies and sports leagues, and intellectual property litigation.

Mr. Walters earned an A.B. in government from Georgetown University and a J.D. from the University of Chicago. He served as an editor of *The University of Chicago Law Review*. From 1996-97, he served as a judicial clerk with the Hon. Emilio M. Garza on the U.S. Court of Appeals for the Fifth Circuit. He worked in The White House from 1991-93 in the Office of Media Affairs and the Office of Presidential Speechwriting.

He is an adjunct professor at the Georgetown University Law Center, where he teaches The Law of Autonomous Vehicles, and at Cornell Tech, where he teaches The Law of Robots, a class about the frontiers of law and technology. He is the author and editor of *Data-Driven Law* (Taylor & Francis 2018).



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