

PRACTICAL LAW OFFICE SOLUTIONS

and

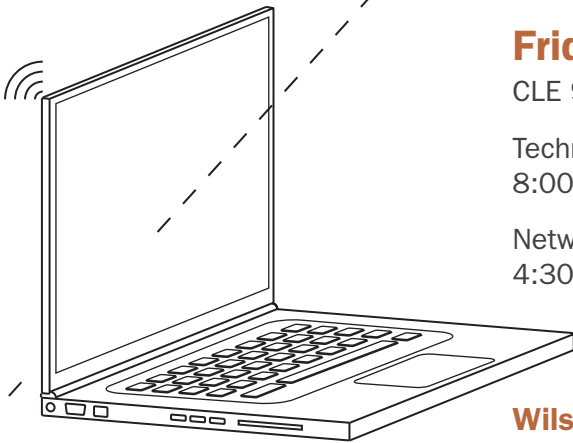
TECHNOLOGY FAIR

for

SOLE

and

SMALL FIRMS



Friday, May 8, 2009

CLE 9:00 a.m. – 4:30 p.m.

Technology Fair open
8:00 a.m. – 6:00 p.m.

Networking Reception
4:30 p.m. – 6:00 p.m.

Wilsonville Holiday Inn

Wilsonville, Oregon

4.5 MCLE General or Practical Skills
Credits

Sponsored by

OSB Law Practice Management Section

OSB Sole and Small Firm
Practitioners Section

Oregon State Bar

OSB Professional Liability Fund

West, a Thomson Reuters business

Friday, May 8, 2009

4.5 MCLE General or Practical Skills Credits

Wilsonville Holiday Inn

25425 SW 95th Avenue
Wilsonville, Oregon 97070

This CLE will provide you with technology advice and information that is tailored to small firms and sole practitioners. Program speakers include: Sharon Nelson and John Simek, authors of the ABA publication, *The 2009 Solo and Small Firm Legal Technology Guide: Critical Decisions Made Simple*; nationally recognized Practice Management Advisors, Beverly Michaelis and Dee Crocker; and a panel of Oregon lawyers who have successfully transitioned to a paper-less office.

This CLE offers:

- Step-by-step instructions for making sound technology decisions
- A complete, unbiased overview of current legal technology products
- Translation of geek-speak
- Information on how to choose the right operating system and software for your office including case management applications, billing systems, and document management solutions; what you need to go wireless; and how to protect your law office from security threats, including viruses, spyware, and spam
- Practical tips for managing your time and the steady flow of information that you face every day
- An overview of what is and is not subject to electronic discovery and recovery; metadata; and reading electronic data

The event includes a free Technology Fair where you will find software for accounting, billing, case management, and document assembly; online research providers; hardware and software consultants; and the hardware and software necessary to help you go paper-less. Knowledgeable vendor representatives will be at the Technology Fair to provide you with demonstrations of their products and a networking social afterwards so you can brainstorm and discuss solutions with your peers.

This program is \$5 for members of the OSB Law Practice Management Section (LPM) or the OSB Sole and Small Firm Practitioners Section (SSFP), \$25 for non-members.

You can join the LPM or SSFP by going to www.osbar.org. On the left side of the OSB Home page you will see a green title “Bar Leadership.” Click on Section Information, click on Join a Section, click on Join a Section Online. This will bring you to the OSB Membership Fee Payment page (www.osbar.org/store/db/default.asp?). When you reach this page, enter your OSB Bar Number. Then click on Add/Change Sections. You will see the menu for joining.

To register for this CLE, send your registration fee and this form to:

DeAnna Shields, OSB Professional Liability Fund,
P.O. Box 231600, Tigard, OR 97281-1600.

Conference Agenda

8:00 – 9:00 Registration, Technology Fair, and Breakfast
Breakfast is sponsored by West, a Thomson Reuters Business

**9:00 – 10:30 Making the Technology Monster Work for YOU
– Technology Solutions and Evaluation Tools**

This segment will provide an overview of hardware and software that is useful and budget-conscious for small firms and sole practitioners, will explain commonly used geek-speak, and will provide you with criteria to evaluate which hardware and software programs are right for your law practice. The discussion will include case management, document management, digital dictation, billing, time keeping, PC security, wireless security, and much more. Hear from expert monster tamers and authors of *The 2009 Solo and Small Firm Legal Technology Guide: Critical Decisions Made Simple*, Sharon Nelson and John Simek.

10:30 – 10:45 Break – Sponsored by the Law Practice Management Section

**10:45 – 11:30 Making the Time Monster Work for YOU
– Solutions for E-mail and Time Management**

This segment will provide you with practical tools for managing your e-mail and voicemail as well as other time survival tips. Presented by PLF Practice Management Advisors Beverly Michaelis and Dee Crocker.

11:30 – 1:30 LUNCH AND TECHNOLOGY FAIR

Enjoy a sandwich, salad, and dessert buffet and then test drive billing software, online research, case management software, document management software, scanners, and document assembly programs. Vendors include: West, a Thomson Reuters business; Litigation Information Management, Inc.; DaVinci Digital; Discovery Media Productions; Pacific Legal; Bridge City Legal; TAMS; Advanced Legal Systems; Amicus Data, LLC; Baker + Cadence Solutions, LLC; The Red Wizard; Xerox; Copytronix; Great Northwest Dictating; Abacus; Ikon; The Naegeli Reporting Corporation and Naegeli Trial Technologies.

1:30 – 2:30 Electronic Discovery for the Small Firm and Sole Practitioner

An overview of electronic discovery, including an explanation of what can and cannot be recovered from computers, cell phones, global positioning systems (GPS), flash drives, iPods, and other devices; how to choose a forensic expert; how to properly preserve evidence; which format to use or request and why; how to protect privileged and proprietary data; metadata – what it is and how you can keep others from reading it; and how to interpret electronic data. Plus, how to do all of this on a tight budget. Presented by Sharon Nelson and John Simek.

2:30 – 2:45 Break – Sponsored by the Sole & Small Firm Practitioner Section

2:45 – 4:30 Transitioning to the Paper-Less Office

A panel discussion and sharing of their expertise and experience transitioning to paper-less offices. Steven O. Rosen, The Rosen Law Firm; Eden Rose Brown, Law Office of Eden Rose Brown; David R. Ambrose and Janis K. Alexander, Ambrose Law Group; and John Simek, Sensei Enterprises.

4:30 – 6:00 Reception: An opportunity to network and share information with your colleagues. Sponsored by the Law Practice Management Section and the Sole Small Firm Practitioner Section.

Meet Our Faculty



Sharon D. Nelson, Esq. is the president of Sensei Enterprises, Inc., a computer forensics and legal technology firm located in Fairfax, Virginia. She graduated from Georgetown University Law Center in 1978 and has been in private practice ever since, now concentrating exclusively in electronic evidence law. Ms. Nelson serves as Chair of the American Bar Association's Law Practice Management Publishing Board and as a member of ARMA's E-Discovery Advisory Group. She is a past chair of the American Bar Association's TECHSHOW and serves on a wide variety of committees, boards, and councils for the Virginia State Bar. She is a co-author of *The Electronic Evidence and Discovery Handbook: Forms, Checklists and Guidelines* (American Bar Association, 2006), *Information Security for Lawyers and Law Firms* (American Bar Association, 2006), and *The 2009 Solo and Small Firm Legal Technology Guide: Critical Decisions Made Simple* (American Bar Association, 2009).



John W. Simek is the vice president of Sensei Enterprises, Inc. Mr. Simek holds a degree in engineering from the US Merchant Marine Academy and an MBA in finance from Saint Joseph's University. He is an EnCase Certified forensic technologist (EnCE), a Certified Handheld Examiner, Certified Novell Engineer, Microsoft Certified Professional + Internet, Microsoft Certified Systems Engineer, NT Certified Independent Professional, and a Certified Internetwork Professional. He is a member of the ABA Law Practice Management Publications Board, the Advisory Board for the ABA's Law Practice TODAY webzine, and he provides information technology support to law firms. He has written several books for lawyers on electronic evidence, discovery, information security, and technology – the most recent of which is *The 2009 Solo and Small Firm Legal Technology Guide: Critical Decisions Made Simple* (American Bar Association, 2009).



Dee Crocker has over 30 years of experience in the legal field, including work as a legal secretary; a secretarial supervisor; a law office manager; and since 1992, a practice management advisor for the Professional Liability Fund. As a practice management advisor, Ms. Crocker educates attorneys and law office personnel in docket control, conflict of interest systems, mail handling, billing, trust accounting, general accounting, time management, file management, client communications, computer systems, and other practice management issues. She is a frequent speaker and writer on practice management and technology issues and is a contributing author to *A Guide to Setting Up and Running Your Law Office* (PLF 2005), *Planning Ahead: A Guide to Protecting Your Clients' Interests in the Event of Your Disability or Death* (PLF 2006), and *A Guide to Setting Up and Using Your Lawyer Trust Account* (PLF 2005).



Beverly Michaelis has over 25 years' experience in the legal field including work as a lawyer; legal assistant; placement director and associate executive director for the MBA; and since 1996, a Professional Liability Fund practice management advisor. In her work as a practice management advisor, Ms. Michaelis provides confidential practice management assistance to Oregon attorneys to reduce their risk of malpractice claims, enhance their enjoyment of practicing law, and improve their office systems. She regularly presents and writes on practice management, technology, and malpractice avoidance topics and is a contributing author to *The Ethical Oregon Lawyer*, (OSB 2005), *A Guide to Setting Up and Running Your Law Office* (PLF 2009), *Planning Ahead: A Guide to Protecting Your Clients' Interests in the Event of Your Disability or Death* (PLF 2009), and *A Guide to Setting Up and Using Your Lawyer Trust Account* (PLF 2009).



Steven O. Rosen is the owner of The Rosen Law Firm, Portland, Oregon. He holds a BS in Aerospace Engineering from the State University of New York at Buffalo, an MS in Systems and Control Engineering from Case Western Reserve University, and a JD from Lewis and Clark Law School. His firm focuses on civil litigation, trying cases in state and federal courts. Mr. Rosen is an Associate Member of the American Board of Trial Advocates, having been nominated by other attorneys in Oregon. His Movie Magic: How the Masters Try Cases CLE program has twice been designated an ABA Presidential Showcase Program. He is a frequent CLE presenter, including locally and throughout the United States and British Columbia. Mr. Rosen has been active in the leadership of the ABA Section of Litigation since 1990 and currently serves as Co-Chair of Distance CLE Committee. He received the Distinguished Adjunct Professor Award from the Lewis and Clark Law School Graduating Class of 1986.



Eden Rose Brown received her BA from the University of California, Berkeley, and her JD from Lewis & Clark Law School. She served as a United States Air Force Judge Advocate and Assistant U.S. Attorney from 1989 to 1993 and in support of the Gulf War in 1991. After her active duty tour, Ms. Brown opened her estate planning firm in Salem. Known for her unique and comprehensive values-based, client-centered practice approach, Ms. Brown concentrates her practice in the areas of wealth preservation, family legacy design, probate and trust administration, and highly customized estate, tax and charitable planning. She is the co-author and co-editor of *Giving - Philanthropy for Everyone*, published by Quantum Press (2003) and designed a practice system for estate planning attorneys (www.PracticeBuildersEP.com). She is a frequent speaker on office management, marketing strategies, and estate and charitable planning.

CLE Sponsors (*click a sponsor for more info*)

CLE Exhibitors (*click an exhibitor for more info*)

Conference Registration

To register, please fill out the form below and mail with check to DeAnna Shields at the OSB Professional Liability Fund, PO Box 231600, Tigard, OR 97281-1600. If you have any questions, please call DeAnna Shields at 503-639-6911 ext. 440.

Name _____

Firm _____

Address _____

City _____ **State** _____ **Zip** _____

Bar# _____

E-mail _____

(If you don't provide an e-mail address, you will not receive a registration confirmation.)

Fee: Please check one below:

- \$5 Yes, I am a member of the OSB Sole and Small Firm Practitioners Section or the OSB Law Practice Management Section.
- \$25 No, I am currently not a member of the OSB Sole and Small Firm Practitioners Section or the OSB Law Practice Management Section.

Mail form with fee (with check) to:

DeAnna Shields, PLF, PO Box 231600, Tigard, OR 97281-1600.