

AGENDA **2023** SPRING SUMMIT

Indispensable: Your Law Firm in 2023 and Beyond

Welcome to Chicago, IL

Thursday, April 27

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

10:30am–12:30pm

Pre-Summit Networking Lunch

Join our VIP Guests and Newest Members and get an opportunity to connect prior to the Summit. This session is intended for VIP guests, new Members who have joined since the 2022 Fall Summit, and Members looking to connect prior to the Summit.

Cost: \$65 for Members; included for VIP Guests and those who joined since the 2022 Fall Summit

SPRING SUMMIT 2023—MAIN SESSIONS

First Seat Free, Additional Seats \$595 per person.

Late Registration/Cancellation Fee: \$225 per seat after registration closes, \$375 cancellation fee week of April 24.

1:00pm–2:45pm

Welcome and Opening Ceremony

30th Anniversary Kick-Off.

Join Academy founders Robert Armstrong and Sanford M. Fisch as we kick-off the 30th Annual Spring Summit!

Speakers: Robert Armstrong and Sanford M. Fisch

2:45pm–3:15pm

Founders Message

Speakers: Robert Armstrong and Sanford M. Fisch

3:15pm–3:30pm—BREAK

3:30pm–5:00pm

Keynote Session—Relational Leadership: The Key to Success in the Age of AI

Keynote Speaker: Jim Ferrell, *Withiii*

6:30pm–9:00pm—30th Anniversary Gala Dinner

Join us as we celebrate 30 years of the Academy with a Gala Dinner. Attire is Black Tie Optional so get your tuxedos and ballgowns ready! Please note, Guests of Members must register and pay for this evening event.



Friday, April 28

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

MAIN SESSIONS

BREAKOUT SESSIONS

6:30am–7:45am—POINT PEEPS BREAKFAST
Invitation only Ask your PBC if you are interested in attending

8:00am–10:00am

Special Needs Planning (CLE Eligible Session)

Speaker: Kristen Lewis, *The Bowden Law Firm, LLC*

8:00am–10:00am

Marketing Roundtable

The Friday morning Marketing Roundtable is a staple at Academy Summits. Don't miss your opportunity to hear marketing wins from fellow law firms. You'll leave this session energized and full of ideas to implement.

Facilitator: Practice Building Coaches

10:00am–10:30am—BREAK

10:30am–11:30am

Securing the Future of Your Law Firm In a Changing Legal Landscape

Speakers: Robert Armstrong and Sanford M. Fisch

ALL ATTENDEES IN MAIN ROOM

11:30am–1:30pm—LUNCH BREAK

Financial Database

*Only participating Members (and spouses) who submitted their financials by the deadline and new Members who received a guest pass from their PBC may attend.
\$85 per attendee, cost includes lunch.*

1:30pm–2:00pm

What's New and Upcoming

- Financial Services
- Technology
- Marketing
- Modules
- Client Asset Form
- Arbinger

Speakers: Alicia Durante, Erin Mathew, Rita Chaires, and Steve Hartnett

1:30pm–3:00pm

Client Membership Program Workflow in CounselPro™8

Client Membership programs are a great way to generate annual revenue for your firm. During this session you'll see how easy it is to keep track of all your Client Membership Program participants, what income is generated, and what discounts are applied.

Speakers: Randy Murray and Taylor Jones

2:00pm–3:00pm

How To Build and Maintain An A-Team

- Onboarding
- Keeping Employees Engaged
 - Performance Reviews
 - Feedback and Acting on Input

Speaker: Emily Possidento, *MCM*

3:00pm–3:30pm—BREAK

Friday, April 28

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3:30pm–5:00pm

Success Stories and Lessons Learned

Hear from a panel of Academy Members as they share their successes and lessons learned since the Fall Summit. This session is always a favorite for owners and their teams. Don't miss the opportunity to hear what is working in your fellow Members' communities.

Facilitator: Robert Armstrong, Alicia Durante, and Member Panel

5:30pm–8:30pm—Social Event

Architecture Tour on the Chicago River

Join us aboard a private tour boat as we see the sights of historic Chicago. Heavy appetizers included.

Ticket Price: \$140 per person, non-refundable

Saturday, April 29

6:50am–7:50am—Document Language Committee Breakfast

MAIN SESSIONS

8:00am–9:15am

30 Day Online Marketing Challenge

What better way to celebrate our 30th year than providing 30 actionable tasks designed to maximize your law firm marketing efforts and increase revenue?

Speaker: Rita Chaires

BREAKOUT SESSIONS

8:00am–9:15am

Managing and Auditing Your Actionstep Database

Put the power of CounselPro™ 8's listviews to work! We've said it time and time again, garbage in = garbage out. But how do you know if your team is putting garbage in? This session will help you understand how to use your listviews to manage the information your firm lives on. Learn what information needs to be included in contact records and matters to determine how your firm is performing.

Speaker: Randy Murray and Taylor Jones

9:15am–9:45am—BREAK

9:45am–11:30am

Dealing with Uncle Sam, Everyone's Least Favorite Relative in the Family Business

(CLE Eligible Session)

Speaker: Sam Donaldson

9:45am–11:30am

Hands-On Implementation of 30-Day Online Marketing Challenge

Bring your laptop and be ready to brainstorm, tackle, and calendar the 30-day challenge.

Speaker: Rita Chaires

11:30am–1:30pm—LUNCH BREAK

DocuBank New Member Lunch | Board of Governors Lunch

1:30pm–3:30pm

Federal Tax Update (CLE Eligible Session)

Speaker: Sam Donaldson

1:30pm–3:30pm

Special Need Marketing Module Implementation
Learn the practical steps to implement the Special Needs Marketing module in your law firm.

Speaker: PBCs

3:30pm–4:00pm—BREAK

Saturday, April 29

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MAIN SESSIONS

BREAKOUT SESSIONS

4:00pm–5:00pm

Back to Basics

Speaker: Sanford M. Fisch

4:00pm–5:00pm

Power of Marketing with Newsletters

Learn about the importance of nurturing client relationships and the benefits of personalized newsletters.

Speaker: Mykeah Kranzler, Newsletter Pro

5:00pm–5:30pm—BREAK

5:30pm–6:30pm—Funding Panel Discussion

Hear from a Member and Paralegal panel on best practices in funding

Speakers: Member and Paralegal Panel

Sunday, April 30

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MAIN SESSIONS

BREAKOUT SESSIONS

8:00am–10:00am

Quiz Show

(CLE Eligible Session)

Speakers: Steve Hartnett

OFFICE HOURS

10:00am–10:15am—BREAK

10:15am–Noon

Frequently Asked Questions in Trust Administration

(CLE Eligible Session)

Speakers: Tereina Stidd

OFFICE HOURS