

Ontario Bar Association's **TECHxpo 2013**

Bringing the latest technology solutions to the legal profession

- Discover top emerging trends in legal technology
- Learn how to maximize your productivity with the best software solutions
- Find out how to improve client service (and referrals!)
- Use social networking to boost your business development
- and more!



EVENT GUIDE

September 30, 2013. 8 am to 4 pm
Twenty Toronto Street Conferences and Events
20 Toronto Street, 2nd fl.



ONTARIO BAR ASSOCIATION
L'ASSOCIATION DU BARREAU DE L'ONTARIO
A Branch of the Canadian Bar Association
Une division de l'Association du Barreau canadien

Today's technologies can help you serve your clients more easily and efficiently and allow you to respond and work from almost anywhere. But with the myriad options available — you need to know which ones will work best. At TECHxpo, you will get expert guidance to help you sort through the numerous choices offered in legal technology and to bring you up-to-date on the ethical and practical issues surrounding their use.

At this one-day techno blitz, you will benefit directly from sessions on hot legal tech topics such as cloud computing, social networking in business development, records management, BYOD and more. You will also be able to choose from 2 program tracks, meet with exhibitors, try your hand at product demos and network with top legal tech experts.

**Mark your calendars for September 30, 2013.
We look forward to seeing you there!**



0.0 Substantive Hours

6.0 Professionalism Hours

NOTE: Any Professionalism Hours in excess of the 3 required can be applied towards Substantive Hours.

REGISTER NOW!

Tele: 416-869-1047

Toll-free in Ontario: 1-800-668-8900

E-Mail: registrations@oba.org

Web: www.oba.org/TECHxpo

Program Chairs:

David B. Debenham, *Partner, McMillan LLP*

David J. Demirkan, *General Counsel and Director of Legal Services, Canada Industrial Relations Board*

Robert Shawyer, *Shawyer Family Law*

EVENT AT A GLANCE

8:15 am	Registration and Coffee		
9:00 am	Welcome and Opening Remarks from the Program Chairs		
9:15 am	Time Saving Legal Technology Tips & Tricks		
10:15 am	Networking Break		
Track 1		Track 2	
10:30 am	Capturing More Time: Effectively Using Billing and Financial Software to Boost Your Productivity	10:30 am	Records Management Essentials
11:15 am	Going Paperless: What are the New Ways to Do It?	11:15 am	Cloud Computing: Minimizing Data Security Risks for You and Your Clients
12:00 pm	Lunch		
1:00 pm	Ethical and Efficient Ways to Use Social Networking in Business Development		
2:00 pm	Networking Break		
Track 1		Track 2	
2:15 pm	Hands-On Practical Advice about Apple Hardware and Software	2:15 pm	Managing the Legal and Technology Risks of "BYOD"
3:00 pm	The Virtual Office: Strategies for Using Mobile Devices to Maximize your Productivity		
3:55 pm	Closing Remarks from the Program Chairs		
4:00 pm	Networking Event		

EVENT GUIDE

8:15 am **Registration and Coffee**

9:00 am **Welcome and Opening Remarks from the Program Chairs**

9:15 am **Time Saving Legal Technology Tips & Tricks**

Ensure you are up to speed with your peers about the latest law firm technology by attending this information packed session. What are the most helpful technologies for running your law office? What are the top apps and most useful websites for lawyers? Get the answers to these questions and more along with practical strategies for implementing technology in your practice immediately.

Dan Pinnington, *Vice President, Claims Prevention & Stakeholder Relations, LawPRO*

10:15 am **Networking Break**

10:30 am **Track 1 — Capturing More Time: Effectively Using Billing and Financial Software to Boost Your Productivity**

- What are the most useful and up to date legal software accounting products to help you capture more time?
- Working remotely: How to make sure all of your working time is counted
- Getting more out of your billing software: Using advanced reporting to:
 - increase your efficiency
 - reduce wasted time
 - strengthen your financial health
- Passive, background timekeepers and other new features: how can they work for you?

Robert Shawyer, *Shawyer Family Law*
Mary Fraizinger, *Chief Financial Officer, Gardiner Roberts LLP*
Caitlin Kowalchuk, *Clio*
Ron Collins, *Amicus Attorney*
Speaker, *LexisNexis (PCLaw)*

Track 2 — Records Management Essentials

- Developing a successful records retention policy
- A checklist of what you need to keep and when you can safely dispose of it
- Step by step guide on how to implement a document management system
- Evaluating the latest technology available and understanding current tech trends
- How to ensure you select the right document management software and vendor
- Properly storing and inventorying your retained documents

Dera Nevin, *Managing Counsel, E-discovery, TD Bank Group*
Andrea Taylor, *Director of Operations, ATD Legal Services PC*

11:15 am Track 1 — Going Paperless: What are the New Ways to Do It?

- What are the latest tools available to help you go paperless?
- Best practices when working with Adobe Acrobat
- How much does it cost to add the technology? How much can it save you?
- Practical strategies for ensuring you can find the right document when you need it
 - Essential file storage techniques
 - How to properly use naming conventions
- Successfully implementing the new paperless office: can files can you throw away?
- Security, confidentiality and other serious professionalism issues when going paperless

Peter Henderson, *Henderson Litigation*
Cynthia Spry, *Babin Barristers LLP*

Track 2 — Cloud Computing: Minimizing Data Security Risks for You and Your Clients

- Assessing data storage options in the cloud: costs and risks
- What are the statutory, ethics and rules obligations related to privacy, security and confidentiality in the cloud?
- The top 5 security issues you must consider when determining where to store your data
- Practical strategies for safeguarding your clients' confidential information and trade secrets
- Meeting legal requirements when dealing with a cross border service provider
- Checklist of questions to ask your cloud provider
- Demonstrating privacy due diligence when using cloud services

Speakers: Simon Hodgett, *Partner, Osler Hoskin & Harcourt LLP*
Matthew Snell, *GTS Canada Senior Counsel, IBM Canada*

12:00 pm Lunch is served

EVENT GUIDE

1:00 pm Ethical and Efficient Ways to Use Social Networking in Business Development

- How to use LinkedIn, Twitter and other social networking tools for business development
- Determining when and where to spend your social networking time
- How much time should you spend on it each week?
- Methods for measuring the results of your efforts
- When is social networking equivalent to advertising?
- Posting about clients & cases: what consents do you need and when?
- Essential social networking policies to protect your firm's reputation

Barry Sookman, *Senior Partner, McCarthy Tétrault LLP*
Pascale Daigneault, *Fleck Law*
Paul Kuttner, *Principal, Innovate Marketing Inc.*

2:00 pm Networking Break

2:15 pm Track 1 — Hands-On Practical Advice about Apple Hardware and Software

- What are the different Apple hardware and software products lawyers are using?
 - What's working? What should you avoid?
 - Helpful advice from Apple users
- What types of case management and litigation support software can Apple support?
- Understanding how to effectively use the Mac friendly billing software options and other Mac practice management tools
- How to file share when switching to Mac
- Efficient work-arounds to solve software issues

Victor J. Medina, *Managing Partner & Lead Counseling Attorney, Medina Law Group, LLC*

Track 2 — Managing the Legal and Technology Risks of "BYOD"

- Strategies for addressing the special risks associated with employee owned devices
- Crafting effective BYOD policies
 - Effectively using remote access and corporate owned device policies as a head start
 - Ensuring your policies are consistent
 - Getting the scope right
 - Critical security and privacy considerations
 - Monitoring and restrictions
 - Precedents for BYOD policies

Gillian Stacey, *Partner, Davies Ward Phillips & Vineberg LLP*
Marian Van Hoek, *Counsel, RIM*

3:00 pm **The Virtual Office: Strategies for Using Mobile Devices to Maximize Your Productivity**

You just got your new smartphone and are able to respond to your emails from anywhere and everywhere. You are more accessible than ever but, are you compromising your clients' confidentiality? Attend this session to learn how you can boost your productivity, and what critical steps you must take to protect yourself and your clients, when using mobile devices.

- The essential tools you need to work from anywhere
- Trends in mobile devices: what should you buy to stay ahead of the curve?
- Smartphones vs laptops vs tablets: which to use when and syncing the information
- Blackberry vs iPhone vs Andriod: which one will help you be most industrious?
- Apps to keep you working at optimum speed
- Ethics of mobile computing: Protecting yourself and your clients when working in public spaces
- Reducing your stress: how to switch to off-mode when surrounded with mobile devices

Paul Harte, *Paul Harte PC*
Omar Ha-Redeye, *Fleet Street Law*

3:55 pm **Closing Remarks from the Program Chairs**

4:00 pm **Networking Event**

**Register now for OBA TECHxpo to secure your spot.
We look forward to seeing you there!**

	Member	Non-Member	Student
Morning only	\$195	\$295	\$85
Afternoon only	\$195	\$295	\$85
Full day	\$320	\$420	\$165

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Benefit by generating quality leads with senior level decision makers and purchasers, strengthening relationships with existing customers and reaching new prospects.

For more information, contact OBA's Sponsorship Fundraising Manager Nicholas Casimir at 416-869-1047 ext. 406 or by email at ncasimir@oba.org.