



TECHxpo 2019:

Sole, Small Firm and General Practice and Law Practice Management



In-Person



Webcast



DATE/TIME

Tuesday, November 12, 2019

9:00 am – 4:45 pm

LOCATION:

Twenty Toronto Street Conferences and Events

20 Toronto Street, 2nd Floor, Toronto, ON M5C 2B8

PROGRAM CHAIRS:

Cheryl Grossman, Entertainment Lawyer

Omar Ha-Redeye, Durham Community Legal Clinic

Professionalism Hours: This program contains **5.00**

The OBA has been approved as an Accredited Provider of Professionalism Content by The Law Society of Ontario..

Join us at Ontario's premier annual conference on legal technology solutions for small and medium sized law firms. TECHxpo is a must attend event for anyone who is selecting or re-examining their firm software, looking to get the best results out of their existing technology, or interested in what legal technologies will be available tomorrow. Our expert faculty will provide advice on how to approach and implement technology, as well as hands on training and demonstrations that will ensure you are maximizing your time in the most cost-effective manner possible.

Join us to make sure you have the right technology that works for you.

8:30 am Registration and Coffee

9:05 am Fireside Chat with the Legal Innovation Zone

Moderator: Colin Stevenson, OBA President
Chris Bentley, Managing Director of the Legal Innovation Zone, the OBA's 2019-20 Innovator in Residence

An exciting kickoff to TECHxpo 2019: OBA President, Colin Stevenson will sit down with Chris Bentley, the Managing Director of the Legal Innovation Zone, to discuss where legal innovation and technology is headed; how, as a busy lawyer, you can make sure you are keeping up on the latest developments and what new opportunities these developments are presenting.

Fireside Chat with the Legal Innovation Zone: From Ideas to Action - Examples of Practice Innovation

Moderator: Hersh Perlis, Director of the Legal Innovation Zone, the OBA's 2019-20 Innovator in Residence

Sean Bernstein, Co-Founder, MinuteBox

Stephanie Curcio, Co-founder, Legality

The Director of the Legal Innovation Zone will sit down with two LIZ startups to discuss their road from practicing lawyers to legal entrepreneurs. They will also discuss lessons learned along the way and insights on the legal technology landscape of today (and tomorrow).

10:25 am CONCURRENT SESSIONS: CHOOSE A OR B

A

Implementing Technology into a Small and Solo Practice

Moderator: Amanda Rosenstock, Grinhaus Law Firm

Mona Datt, Loom Analytics

Faraz Khan, Khan Law

Sarah Sutherland, CanLII

All modern legal practices implement some technology, but small and solo practices often have more difficulty identifying and adopting technology. This session will highlight free and lean tools and how to develop your own tools internally, including how to build your own, as well as the common pitfalls of these approaches.

OR

B

Build Flexibility into Your Law Practice With Outsourcing

Moderator: Cheryl Grossman, Entertainment Lawyer

Peter Carayiannis, Conduit Law and Clerks On Demand

Amy Grubb, Grubb Law

Melissa LaFlair, WSIB

You're spending too much time on non-legal work, but you don't want the hassle of recruiting full time staff. You're ready to scale up, but you need more time freed up to do it. Enter the virtual contractor, whether it be receptionists, assistants, clerks, marketers or

10:10 am Refreshment Break

any other service providers of your choice. In this session we discuss which tech tools can help you manage and communicate with virtual workers, and how to safeguard confidential or other sensitive information. We also discuss the challenges and rewards of being a virtual service provider yourself to other law firms. The world is becoming more flexible, so get ready to find cost savings and more revenue opportunities.

B **Big Data and Big Opportunities for Ontario**
Moderator: Amy Zhang, Lerner Lawyers
Avner Levin, Ryerson University and Minister's Digital and Data Task Force
Dina Maxwell, Axiom Global Canada Inc.
Big data is a big business, and includes initiatives such as the Ontario Data Strategy and Sidewalk Labs. Familiarity with this area, and the privacy concerns that it creates, will be a new and emerging skill for all lawyers.

11:30 am **CONCURRENT SESSIONS: CHOOSE A OR B**

A **Process Mapping and Process Automation (Part 1)**
Moderator: Janine Innes, Barrister & Solicitor
Karen Skinner, Gimbal Canada Inc.
Natalie Worsfold, Counter Tax Lawyers
Automation seems to be the big buzz word at legal tech conferences, but before you automate, you need to process map. Otherwise, you're wasting valuable time and money. In this session, we discuss the main principles required to map out your internal processes with an eye towards later automating them. Principles will be illustrated through lean process mapping examples, from client intake to complicated legal workflows.

OR

B **Lawyers Learning About Artificial Intelligence**
Moderator: Victoria Xayaboun, The Innovative Financier
Egi Troka, Queen's Law Conflict Analytics Lab
Sarah Mohamed, dTrax (Deloitte Omnia)
Ian Stedman, York University Artificial Intelligence and Society Task Force
Machine learning and artificial intelligence are buzzwords we all hear in the news, but we may not realize we already use these technologies in our legal practice. As these tools become more complex, lawyers may have to learn more about how they work and how to use them. This session will look at how law students, lawyers, and law schools are developing programs to learn about artificial intelligence, including courses in coding.

2:30 pm **CONCURRENT SESSIONS: CHOOSE A OR B**

A **Decoding Legal Tech for Your Practice**
Moderator: Megan Cornell, Momentum Business Law
Colin Levy, Corporate Counsel, Salary.com, Legal Innovation Advisor
Understanding the legal tech landscape and how to select a solution for your practice. Choosing a legal tech solution(s) for your practice can be so overwhelming that it is easy to simply not get started. In this session we will learn to create a roadmap to identifying and implementing a solution to streamline and innovate in your practice. Analyze whether technology is even the right solution, examine how your team works and what they do and finally, how to go about assessing the different options.

OR

B **Money Laundering in a Digital Era**
Moderator: Heather Douglas, AMR Barristers and Solicitors LLP
Gene DiMira, Global Compliance Office AML at Manulife
Alison Manzer, Cassels Brock Lawyers
Know your client and money laundering requirements have taken an entirely different meaning in a digital era. In addition to the challenges with remote clients out of jurisdiction, there are emerging concerns about how cryptocurrencies could be used as payment for lawyers. This panel will explore what cryptocurrencies mean for lawyers, including use for fees, if it can be held in escrow, and how it increases the risk of money laundering.

12:30 pm **Lunch and Networking**

1:00 pm **Keynote Address**
Roman Baber, MPP York Centre & Chair, Standing Committee on Justice Policy

3:30 pm **Refreshment and Networking Break**

3:45 pm **Social Media 2.0**
Moderator: Rocco G. Scocco, Scocco Law
Daniel Iannacito, Iannacito Enterprises
Anthony Godrassi, AG Tek Pro Inc
Puneet Tiwari, Evichat

Ready to boost your practice to the next level? Social Media 2.0 will provide you with all the cyber savviness to expand your firm's social media influence. Our panelists will introduce you to the growing list of professional success stories paved by the new world of digital marketing. You will also be educated on all the cyber-risks of social media so that your firm and client's privacy are protected as you tweet your way to success. Finally, you will be provided insights into how social media has revolutionized the law of evidence.

4:30 pm **Closing Remarks**

1:30 pm **CONCURRENT SESSIONS: CHOOSE A OR B**

A **Process Mapping and Process Automation (Part 2)**
Moderator: Cheryl Grossman, Entertainment Lawyer
Rohit Parekh, Conduit Law
Megan Cornell, Momentum Law
Continuing from the morning session, expect to learn from these cutting edge lawyers about specific technologies to help with process automation, including Microsoft Planner, Asana, Trello, and Lexicata. These technologies can assist in communications with clients; establishing to do lists and reminders; task management and more.

OR