

Tuesday, October 26 | Insights-Fueled Growth

<i>*All times listed in PDT</i>	Industry Track Data Driven Law & Business	Industry Track Law Firm Foundations	Clio Track Clio Best Practices	Clio Track Tech Corner: New & Noteworthy	Partner Track The Connected Firm	Channel / Segmented Track	Wellness & Activation Track
7:45 - 8:00 a.m.	Emcee Welcome: Jesse Harink & Nefra-Ann MacDonald						
8:00 - 9:30 a.m.	Opening Keynote: Jack Newton						
9:30 - 11:15 a.m.	State of the Industry: 2021 Legal Trends Report* Session & Q&A Speaker: George Psiharis 10:00-11:00 a.m.	An Inbound Marketing Fireside Chat with Rand Fishkin Panel Discussion Speaker: Rand Fishkin Host: Alex Shipillo 9:45-10:15 a.m.	How to Set up Firm Processes to Get More Clients Workshop Speaker: Adrian Francis 9:45-10:15 a.m.	Integrated Payments for Your Firm Session 9:45-10:10 a.m.	Understanding Clio's App Ecosystem Session 9:40-10:00 a.m.		Brew your Best Pour-Over Coffee 9:30-10:00 a.m.
			Build the Perfect Client Intake Process for Your Firm Workshop 10:45-11:15 a.m.	The Latest in Document Management Session 10:30-10:50 a.m.	The 10 Reasons To Join The New York State Bar Association Session 10:30-10:45 a.m.		Discussion: Understanding Clio's App Ecosystem Breakout Session 10:15-10:45 a.m.
					When to Add Your Next Associate or Offer with Smarter Firms Session 11:15-11:30 a.m.		

 PDF current as of October 21, 2021. For the latest agenda visit cliocloudfoundation.com/agenda

*Seeking CLE/CPD credit for this session

All sessions will be available both live and to watch on-demand at your convenience

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11:15 - 11:45 a.m.	Expo Hall / Wellness / Networking						
						Barry's 11:15-11:45 a.m.	Barry's 11:15-11:45 a.m.
11:45 a.m. - 2:15 p.m.	Data-Driven Decisions: Applying Legal Trends to Your Practice* Panel Discussion Host: Fraser Newton Speaker: Nika Kabiri 11:45-12:30 p.m.	Law Firm Spotlight: Serving Your Community Panel Discussion Host: Derek Bolen 12:15-12:45 p.m.	How to Build a Sales Pipeline in Clio Grow Workshop 11:45-12:30 p.m.	Sneak Peek Into the New Outlook Add-in Session 12:00-12:20 p.m.	Law Firm Spotlight: Unleashing Clio's App Ecosystem Panel Discussion 11:45-12:15 p.m. Speaker: Erin Callahan, Mike Allen	Clio Partner Summit Session 12:15- 1:30 p.m. Guest Speakers: George Psiharis, Mik Lernout, and Dave McCann	Meditation Break 12:45-1:00 p.m.
	Legal Evolution & A More Diversified Legal Market* Session & Q&A Speaker: Jae Um Host: Joshua Lenon 1:00-2:00 p.m.	The Wow Factor Trifecta: Brand, Marketing & Driving Referrals Session & Q&A Speaker: Sonia Lakhany Host: Nefra-Ann Macdonald 1:15-2:15 p.m.	Client-First Billing & Collections Workshop 1:00-1:45 p.m.	Meet Your Clients Where They Are - Send a Text, So They Won't Forget Session 12:50-1:10 p.m.	Launch//Code Competition Finals Pitch Competition 12:45-1:45 p.m.		Wellness: Guided Face & Eye Relaxation 1:40-2:00 p.m.
				What's New in Client Experience Session 1:40-2:00 p.m.			Customer Meetup: Insights Fueled Growth 2:00 - 2:30 p.m.
2:20 - 3:30 p.m.	After Hours Entertainment: Aloe Blacc						

Wednesday, October 27 | Being Client-Centered

<i>*All times listed in PDT</i>	Industry Track Data Driven Law & Business	Industry Track Law Firm Foundations	Clio Track Clio Best Practices	Clio Track Tech Corner: New & Noteworthy	Partner Track The Connected Firm	Channel / Segmented Track	Wellness & Activation Track
7:45 - 8:00 a.m.	Emcee Welcome: Kimberly Whyman & Shubham Datta						
8:00 - 9:15 a.m.	Opening Keynote & Q&A: Arianna Huffington, Host: Jack Newton						
9:00 - 11:15 a.m.	Improving Service to Better Guide Your Clients* Session & Q&A Speaker: John Strohmeyer Host: Rio Peterson 9:45-10:45 a.m.	Pricing & Packaging: Subscription Services Session & Q&A Speaker: Kim Bennett Host: Joshua Lenon 9:15-10:15 a.m.	Safe & Secure Client Collaboration Workshop 9:30-10:00 a.m.	Clio Scheduler: Appointment Booking Made Easy Session 9:15-9:35 a.m.	Integrations that Improve Client Communication Session 9:45-10:05 a.m.	7 Tips to Level-Up Your Mid-Sized Firm Session 9:15-9:45 a.m.	Improving Team Wellness 9:15-9:45 a.m.
		Law Firm Spotlight: Leading with Empathy* Panel Discussion Host: Derek Bolen 10:45-11:15 a.m.	Setting up Clio Grow with Manage Workshop 10:30-11:00 a.m.	Clio's New Client Portal Session 10:15-10:35 a.m.	Product Pitch: DialPad Session 10:45-11:15 a.m.	Mid-Market Spotlight: Grow Your Firm Without Compromising Client Experience Session Speaker: Darilu Cartagena, Angela Lennon, Michaela Seidl 10:15-11:00 a.m.	Start Your Day Stress Free 9:20-9:40 a.m.

Wednesday, October 27 | Being Client-Centered

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11:15 - 11:45 a.m.	Expo Hall / Wellness / Networking						Barry's 11:15-11:45 a.m.	Barry's 11:15-11:45 a.m.
11:45 a.m. - 2:00 p.m.	The Trauma-Informed Lawyer: 4 Guiding Principles for Effective Legal Service Design* Session & Q&A Speaker: Helgi Maki Host: Natalie Archibald 11:45-12:45 p.m.	Crossing the Chasm: Bridging Firm & Client Expectations* Session & Q&A Speaker: Iffy Ibekwe Host: Ashley Moore 1:00-2:00 p.m.	Onboarding New Staff to Clio Workshop Speaker: Franklin Orellana Erriola, Richard Ward 11:45-12:15 p.m.	Automating Your Collections Process Session 12:00-12:20 p.m.	Product Pitch: AXEL Session 12:00-12:15 p.m.	Affinity Partner Community Event Session Guests: Catherine Sanders Reach, Lisa Bormaster, Lauren Oakley 12:15- 1:15 p.m.	Meditation Break 12:00-12:15 p.m.	
	Recruiting & Championing the Next Generation* Panel Speaker: Bryan Parker 1:15-2:30 p.m.		Getting Started with Clio Grow: Forms & Templates Workshop 1:00-1:45 p.m.	Google My Business + Clio Session 12:50-1:10 p.m.	Product Pitch: Zoom Session 12:45-1:15 p.m.		Dive Under the Sea with a Shark Expert 12:45-1:15 p.m.	
				The Power of Payment Plans Session 1:40-2:00 p.m.	Product Pitch: Docketman Session 1:45-2:00 p.m.		Discussion: Affinity Partner Community Breakout Session 1:35-2:05 p.m.	
2:20 - 3:30 p.m.	After Hours Entertainment: Justin Willman							

Thursday, October 28 | Operational Excellence

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7:45 - 8:00 a.m.	Emcee Welcome: Jesse Harink & Nefra MacDonald						
8:00 - 9:00 a.m.	Opening Keynote: Scott Stratten, Host: Reagan Attle						
9:00 - 11:15 a.m.	From System to Software: Mapping Your Law Firm Tech Stack* Session & Q&A Speaker: Melanie Leonard Host: Emma Raimi-Zlatic 9:30-10:30 a.m.	Privacy Compliance For Law Firms* Session Speaker: Joshua Lenon and Scott Kramer 9:15-9:45 a.m.	Getting Started with Clio Manage: Set Up Your Account, Contacts, and Matters Workshop 9:30-10:00 a.m.	Introducing Lawyaw Session 9:30-9:50 a.m.	Simplify How You Work With Microsoft 365 and Clio Session 9:15-9:45 a.m.	Moving to the Cloud: A Guide to Clio for Solo & Small Firms Session 9:15-9:45 a.m.	Office Organization with Shira Gill 9:15-9:45 a.m.
		Accounting Insights for Your Law Firm* Session & Q&A Speaker: Peggy Gruenke Host: Rob Froment 10:15-11:15 a.m.	Getting Started with Clio Manage: Using Tasks and Calendars Workshop 10:30-11:15 a.m.	What's New in Task Management Session 10:15-10:35 a.m.	Product Pitch: TurnSignl Session 10:30-10:45 a.m.	Office Manager's Guide to Maximizing Operational Efficiency Session Host: Bronwyn Larsen Speakers: Corine Rogers & Julia Taylor 10:15-10:45 a.m.	
				Popular Reports & How to Find Them Session 11:00-11:15 a.m.	Product Pitch: Divorce123 Session 11:00-11:15 a.m.		

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						Barry's 11:15-11:45 a.m.	Barry's 11:15-11:45 a.m.
11:45 a.m. - 2:15 p.m.	How to Drive Law Firm Growth Through Digital Marketing: Lessons Learned & Mistakes to Avoid Session & Q&A Speaker: Seth Price Host: Meggie Javid 11:45-12:45 p.m.	Law Firm Spotlight: Building a Distributed Firm* Panel Discussion Host: Derek Bolen 11:45-12:15 p.m.	Getting Started with Clio Manage: Automating Documents Workshop 12:00-12:45 p.m.	Leveraging Clio for Law Firm Reporting & Insights Session 11:45-12:15 p.m.	Popular Apps for Supercharging Efficiency Session 1:45-2:05 p.m.	How to Start a Virtual Law Firm* Session Speaker: Justin Osborn Host: Paul Sahota 12:15- 12:45 p.m.	Mediation Break 12:30-12:45 p.m.
	How Innovative Firms Differentiate Their Brand with Client Experience* Panel Discussion Host: Katy Goshtasbi 1:15-1:45 p.m.	Culture, People, and Purpose* Session & Q&A Speaker: Sarah Bettencourt Host: Lyndsey Dyer 12:45-1:45 p.m.	Getting Started with Clio Manage: Billing and Payments Workshop 1:15-2:00 p.m.	The End-to-End Cloud Payment Experience Session 12:30-12:50 p.m.		Lessons Learned from Starting a Law Firm* Panel Discussion Speaker: Christy Granieri Host: Austin Pantaleo 1:45 - 2:15 p.m.	Open Q&A With Clio's COO George Psiharis 12:00-12:30 p.m.
				Growing Your Firm Using Clio's Billing Features Session 1:30-1:50 p.m.			End Your Day Stress Free 1:40-2:00 p.m.
2:20 - 3:30 p.m.	After Hours Entertainment: LeAnn Rimes						

Friday, October 29 | Access to Justice

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7:45 - 8:00 a.m.	Emcee Welcome: Kimberly Whyman & Shubham Datta						
8:00 - 9:00 a.m.	Opening Keynote: Ian Manuel						
9:00 - 11:15 a.m.	The People’s Law: Regulatory Reform is an A2J Imperative* Session & Q&A Speaker: Rebecca Sandefur Host: Joshua Lenon 9:15-10:15 a.m.	Advocating for Policy Change & Social Impact* Panel Discussion Host: Derek Bolen 9:30-10:00 a.m.	Quickbooks Online + Clio Workshop 9:45-10:15 a.m.	Maximizing Forms & Templates in Clio Grow Session 9:30-9:50 a.m.	AfterPattern Product Pitch Session 10:30-10:45 a.m.	Clio Academic Access Community Session Session 9:15-10:30 a.m.	Yoga Desk Stretch Break 9:20-9:40 a.m.
	The Future of the Legal Industry: In Conversation with Dan Wernikoff Panel Discussion Speaker: Dan Wernikoff 10:45-11:15 a.m.	Virtual Justice: Innovation in the Courts* Panel Discussion Host: Joshua Lenon 10:45 - 11:45 p.m.	Clio Permissions Overview Workshop 10:15-10:45 a.m.	Welcome to the Clio Community Session 11:00-11:15 a.m.	AJ2 Product Pitch Session 10:30-10:45 a.m.	Academic Networking Session 10:45-11:15 a.m.	Dance Your Worries Away 10:00-10:30 a.m.
							Academic Networking Session 10:30-11:00 a.m.

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						Barry's 11:15-11:45 a.m.	Barry's 11:15-11:45 a.m.
11:45 a.m. - 2:15 p.m.	Deregulating Legal Services Panel Discussion Speaker: Allen Rodriguez and Mary Juetten Host: Niamh Pollak 11:45-12:45 p.m.	Fireside Chat with David Lat Panel Discussion Speaker: David Lat Host: Nefra-Ann Macdonald 12:45-1:15 p.m.	Compliant Trust Accounting with Clio Workshop 11:45-12:15 p.m.	Hit Deadlines Everytime with Court Rules Session 11:45 -12:05 p.m.	Membership Impact: ABA Legal Services Session 12:15-12:45 p.m.	Empowering Legal Aid Advocates with Clio Session 12:15 - 1:00 p.m.	Open Q&A with Mik Lernout & Clio's Product Leadership 12:00-12:30 p.m.
			Simplify your Collections: Generate, Share and Receive Payment in the Same Month Workshop 1:00-1:30 p.m.	Going Mobile with Clio Manage Session 12:30-12:50 p.m.			Meditation Break 1:00-1:15 p.m.
1:30 - 2:30 p.m.	Closing Keynote: Jack Newton						
2:30 - 3:30 p.m.	After Hours Entertainment: Big Boi						