Going Paperless: How to Turn Magical Thinking into a Reality

LIVE and WEBCAST
Friday, February 8, 2019
North Carolina Bar Center
Cary

Register Today!
www.tinyurl.com/CLE864POP

Satisfies NC State Bar Technology Training requirement
The paperless office has been oft discussed in law practice. Why? Primarily because of the potential to lower costs, improve efficiency and be more mobile. Your firm may have considered it and dismissed it—too many questions!

We have the answers to those questions whether you are in the beginning stages of discussion or have already made forays into going fully paperless. In this deep dive into the practical steps of taking your firm digital, we discuss and consider dealing with change, firm processes, document management, security, workflows, hardware, software, records retention, backup and more.
FRIDAY, FEBRUARY 8, 2019 | 8:15 a.m. – 4:15 p.m.

8:15  Registration and Continental Breakfast

8:55  Welcome and Introductions

9:00  Benefits and Challenges
      Angel and Reach
      • Tackling the project
        ◦ Planning and timeline
        ◦ Old paper; new paper
        ◦ Budget
      • Culture considerations
        ◦ Carrots and sticks
      • Change management

10:00 Records Retention and Firm Processes
      Derr, Reach and Turner
      • Records retention
        ◦ What do I need to keep in paper?
        ◦ How long do I keep it?
        ◦ How do I effectively close a digital case/matter file?
      • Firm processes
        ◦ Procedures
        ◦ Workflows
        ◦ What about paper-based courts?

11:00 Break

11:15 Hardware and Software Options for a Paperless Practice
      Reach and Turner

11:15 Break

11:15 Networking Lunch

12:15 Networking Lunch

1:00 Document Management
      Jones and Reach
      • File naming conventions
      • Version control
      • Search and access
      • Collaboration tools

2:00 Security
      Pearce and Reach
      • Basic security
      • Encryption
      • Cloud security considerations

3:00 Break

3:15 Backup, Storage and Best Practice Tips
      Mazzone and Reach

4:15 Adjourn
SPEAKERS

- Lisa M. Angel, Rosen Law Firm, Raleigh
- Tricia M. Derr, Lincoln Derr PLLC, Charlotte
- Benji T. Jones, Innovate Capital Law, Raleigh
- Erik L. Mazzone, North Carolina Bar Association, Cary
- Alexander M. Pearce, Ellis & Winters LLP, Raleigh
- Catherine S. Reach, North Carolina Bar Association, Cary
- Pegeen Turner, Legal Cloud Technology, Raleigh

SPECIAL ACCOMMODATIONS
NCBA makes every effort to ensure a quality learning experience. If you have dietary restrictions or need special accommodations, please contact us at least one (1) week prior to the program start date.

CLE AND PUBLICATION SCHOLARSHIPS
Full and partial scholarships are available for attorneys experiencing a financial hardship of any kind. Apply at www.ncbar.org/cle/scholarship.

HOTEL INFORMATION
Contact hotels directly for reservations at the special NCBA room rate. Rates are based on availability and rooms may sell out.

TownePlace Suites by Marriott
120 Sage Commons Way, Cary

- Nightly Rate: $114 studio queen with sleeper sofa (Sunday–Thursday)
- Reservations: 919.678.0005
- Ask for the NCBA corporate rate

Embassy Suites (Limited availability)
201 Harrison Oaks Boulevard, Cary

- Nightly Rate: $169 single/double
- Reservations: 919.677.1840 or www.tinyurl.com/NCBA-Embassy
- Corporate Account Code: 2691626

PLANNER

- Catherine S. Reach, North Carolina Bar Association, Cary

We extend our sincere gratitude to the NCBA Center for Practice Management as well as the speakers who volunteer their time and expertise toward the goal of presenting an educational program of the highest quality.
STEP 1: Tell us who you are. (Please print clearly.)

Print Full Name: ________________________________
Address: ________________________________________
City, State and ZIP: ________________________________
Daytime Phone Number: ____________________________
Email Address: __________________________________
NC State Bar No. (Required for MCLE Credit): ______________

STEP 2: Select your tuition rate.

Standard Rate: ☐ $325
NCBA Member: ☐ $270
CLE Premier Pass: ☐ $0

STEP 3: Select your learning format.

☐ Live (864POP)  ☐ Webcast (864 LWC)  ☐ Video Replay (See below.)

Video Replay registration (if selected).

Video Replays are scheduled for this program. The agenda may not include certain breakouts/tracks shown at the original program. For a list of dates and locations visit www.tinyurl.com/CLE864POP and indicate your choice below.
Location: ____________________________ Date: _________ Code: __________

STEP 4: Complete your payment information.

(Registration is complete only after payment is processed. Please print clearly.)

I am registering for this program at the tuition rate checked above.

☐ Enclosed is a check, payable to NCBA.  ☐ Please charge my credit card.
Card Number: ________________________________ Exp. Date: ______
Total Amount: _________ Signature: ____________________________

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www.tinyurl.com/PremierPass