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**BAR ASSOCIATION**  
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# Going Paperless: How to Turn Magical Thinking into a Reality



**TOTAL CLE CREDIT**

## **LIVE and WEBCAST**

Friday, February 8, 2019  
North Carolina Bar Center  
Cary

## **Register Today!**

[www.tinyurl.com/CLE864POP](http://www.tinyurl.com/CLE864POP)

Satisfies NC State Bar Technology  
Training requirement

## AVAILABLE FORMATS



## PROGRAM SUMMARY

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.

# AGENDA

FRIDAY, FEBRUARY 8, 2019 | 8:15 a.m. – 4:15 p.m.

- |       |   |       |   |
|-------|---|-------|---|
| 8:15  | <b>Registration and Continental Breakfast</b>   | 11:00 | <b>Break</b>  |
| 8:55  | <b>Welcome and Introductions</b>  | 11:15 | <b>Hardware and Software Options for a Paperless Practice</b><br>Reach and Turner   |
| 9:00  | <b>Benefits and Challenges</b><br>Angel and Reach <ul style="list-style-type: none"><li>• Tackling the project<ul style="list-style-type: none"><li>◦ Planning and timeline</li><li>◦ Old paper; new paper</li><li>◦ Budget</li></ul></li><li>• Culture considerations<ul style="list-style-type: none"><li>◦ Carrots and sticks</li></ul></li><li>• Change management</li></ul>  | 12:15 | <b>Networking Lunch</b>   |
| 10:00 | <b>Records Retention and Firm Processes</b><br>Derr, Reach and Turner <ul style="list-style-type: none"><li>• Records retention<ul style="list-style-type: none"><li>◦ What do I need to keep in paper?</li><li>◦ How long do I keep it?</li><li>◦ How do I effectively close a digital case/matter file?</li></ul></li><li>• Firm processes<ul style="list-style-type: none"><li>◦ Procedures</li><li>◦ Workflows</li><li>◦ What about paper-based courts?</li></ul></li></ul> | 1:00  | <b>Document Management</b><br>Jones and Reach <ul style="list-style-type: none"><li>• File naming conventions</li><li>• Version control</li><li>• Search and access</li><li>• Collaboration tools</li></ul> |
|       |   | 2:00  | <b>Security</b><br>Pearce and Reach <ul style="list-style-type: none"><li>• Basic security</li><li>• Encryption</li><li>• Cloud security considerations</li></ul>   |
|       |   | 3:00  | <b>Break</b>  |
|       |   | 3:15  | <b>Backup, Storage and Best Practice Tips</b><br>Mazzone and Reach  |
|       |   | 4:15  | <b>Adjourn</b>  |

# PROGRAM DETAILS

## 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
- **Peegen 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](http://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](http://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.

# REGISTER TODAY!

**Online:** [www.tinyurl.com/CLE864POP](http://www.tinyurl.com/CLE864POP) | **By phone:** 800.228.3402

**By mail:** Attn: Accounting–NCBA, 8000 Weston Parkway, Cary, NC 27513

## STEP 1: Tell us who you are. (Please print clearly.)

Print Full Name: \_\_\_\_\_

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Daytime Phone Number: \_\_\_\_\_

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## 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](http://www.tinyurl.com/CLE864POP) and indicate your choice below.

Location: \_\_\_\_\_ Date: \_\_\_\_\_ Code: \_\_\_\_\_

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Enclosed is a check, payable to NCBA.  Please charge my credit card.

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Discounts may be available for NCBA members who are students, law professors, judges or legal services/public interest attorneys. Call CLE at 800.228.3402 for details.

# NCBA

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## Going Paperless: How to Turn Magical Thinking into a Reality

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**REGISTRATION:** All registrations are processed after payment is received. To qualify for the early tuition rate, payment must be received prior to the deadline indicated. Stated early discount rate percentage is approximate. Registrations may be capped based on venue size and may include an overflow room with additional seating. **CHANGES TO EXISTING REGISTRATIONS:** Should an attendee need to cancel his or her registration to a Live, Webcast or Video Replay program, the cancellation request must be received by 9:00a ET one (1) week prior to the start of the program to receive a full refund. Any attendee requesting cancellation less than one week prior to the program will receive a refund, less a \$75 administrative fee. An attendee may choose to transfer his or her registration at a program to the Live, Webcast or Video Replay format of the same program only. Transfer requests must be received by 9:00a ET one (1) business day prior to the program start date. An attendee may further choose to substitute his or her registration to a Live or Video Replay program only. Substitution means sending another person to attend the Live or Video Replay program when the original registrant is unable to attend. Substitution requests must be received by 9:00a ET one (1) week prior to the program start date. The substituted person may be assessed a different fee based on their NCBA membership classification. Cancellation, transfer and substitution requests must be provided in writing by email at [askcle@ncbar.org](mailto:askcle@ncbar.org) or by calling 800.228.3402. If an attendee misses any portion of a program, that portion is not subject to substitution, refund or transfer. Except as provided herein, registrations, including On Demand registrations, cannot be cancelled, substituted or transferred once purchased. **NO SHOWS:** Anyone who is registered for a program, including CLE Premier Pass holders, but does not check in is considered a no-show. No-shows are not issued a refund, and Premier Pass holders will be assessed a \$75 administrative fee. These registrants will receive the digital materials, available in their online accounts, in full consideration of tuition paid. **MISCELLANEOUS:** The NCBA reserves the right to cancel or reschedule programs at any time. Should the NCBA cancel or reschedule a program, registrants may elect to receive a full refund or attend the newly scheduled program. Notifications regarding program changes will be sent to the email address on file. The NCBA is not responsible for any additional expenses incurred as a result of such cancellation or rescheduling. Each attorney must maintain a record of his or her attendance for the NC State Bar Annual Report. MCLE credit is reported by the NCBA only if a NC State Bar number is provided. Registration and attendance at NCBA CLE programs constitutes an agreement by the registrant with the NCBA for use and distribution of the attendee's image or voice in photographs, videotapes, electronic reproductions and audiotapes of such programs and activities. Unless specified, spouses or guests are not eligible to attend NCBA CLE programs and activities without registering to attend. These terms are subject to change.