# MOMENTUM DENVER 2023 SESSIONS

## (VIRTUAL)

## VIRTUAL SESSIONS

Track: Financial Management

**1099s - Avoid the January Panic**

It's year-end and you are very busy.  Find out what you can do during the year to prepare for 1099 deadline in January.  We will walk through the new 1099 reporting and how to send 1099s to a different name and/or address, combine multiple vendors to one 1099, and use the TIN Matching services our 1099 partners offer as part of their service.

Presenter(s): Todd Peterson, Tonia Johnson

[In-person & Virtual]

Track: Docketing

**A Malpractice Insurer's Perspective on Docketing**

Learnings and recommendations from Randy Curato, Vice President - Senior Loss Prevention Counsel at ALAS Insurance, focused on taking your firm's docketing processes to the next level based on many years of experience from the malpractice insurer's perspective.

Presenter(s): Guest Speaker, Tony Gitelis, Dan Biegel

[Virtual Only]

Track: Matter Compliance/Management

**Aderant Conflicts: Streamline While Managing Risk**

Learn how Aderant's Conflicts solution can streamline conflicts checks and reduce the risk to your firm.

Presenter(s): Austin Sanak, Brendan Roy

[In-person & Virtual]

Track: Information Access

**Aderant Drive and Client Collaboration**

Aderant Drive has helped firms across the globe collaborate better with their clients.  This session will dive into the details of Drive, what it is, what it does, and how it can help you.

Presenter(s): Colin McManamon

[In-person & Virtual]

Track: Billing

**All About AFAs in Expert Billing**

Learn about all of the different Alternative Fee Arrangements (AFAs) available in Expert Billing. We will show you how to maintain these AFAs in Entity Manager and discuss best practices.

Presenter(s): Michelle Lowe

[In-person & Virtual]

Track: Billing

**Best Practices When Implementing/Transitioning From One Time & Billing Solution to Another**

Join us as we talk with our technical experts. Are you planning to implement BillBlast within the next 12 months? Are you transitioning from one financial system to another? Are you planning to upgrade your current version of Expert as a live BillBlast client?  During this session we will be joined with a firm that recently went live with BillBlast and will share best practices, including identifying critical discussions needed.

Presenter(s): Rebecca Girty

[In-person & Virtual]

Track: Billing

**BillBlast Analytics 101**

Basics of types of visuals, interactions with drill through, searching and various filters you can apply through all pages, since page, etc.  Basics of each module and high level view into how firms are leveraging each dashboard. If you want to hear how one firm is leveraging, consider joining the Lessons Learned Leveraging Analytics session later this week.

Presenter(s): Christine Smith

[In-person & Virtual]

Track: Explore Aderant

**BillBlast Automated End-to-End Bill Management**

With the increasing number of clients requiring eBilling coupled with their ever-evolving requirements, eBilling has become difficult to manage, even the most sophisticated firms. Attend our BillBlast overview and learn how we can simplify the entire eBilling process, from submission and tracking to appeals and compliance.

Presenter(s): Christine Smith, Wendie Willner

[In-person & Virtual]

Track: Billing

**BillBlast Support - Best Practices for Expediting Support Cases**

How to get the most out of BillBlast Support throughout the different stages of your BillBlast journey.

Presenter(s): Stephanie McEntire

[In-person & Virtual]

Track: Matter Compliance/Management

**Client Compliance in Action**

Reduce the time spent on outside counsel guidelines and client agreement review while improving your compliance. This class will teach you how to use Aderant's newest application suite, integrated with Expert, BillBlast, and/or iTimekeep to automate terms extraction, rule building, and compliance auditing. Bring your outside counsel guidelines and your client agreements and distill them into actionable information that will save your firm money and reduce your risk today. No experience is needed.

Presenter(s): Mat Jennings

[In-person & Virtual]

Track: Financial Management

**Collections Using Expert Collections Rules**

This session explores how to setup and schedule automated jobs for collections to surface timely information that can then be utilized to enhance and improve collection efforts. Get alerts for critical short payments, skipped payments, and high value receivables earlier in the process. See the flexibility that jobs can provide for addressing firm specific collection rules and strategies.

Presenter(s): Austin Brick, Karen Bailey

[In-person & Virtual]

Track: Docketing

**Court Rules - Frequently Asked Rules Questions**

Benefit from the collective knowledge on our rules team based on frequent inquiries from other firms. Our Rules Team will be discussing questions that often come in, highlighting areas of potential risk or confusion to be aware of, and related commentary.

Presenter(s): Tony Gitelis, Dan Biegel, Miri Wakuta

[Virtual Only]

Track: Docketing

**Court Rules - Important Changes in 2023**

Join this discussion by the court rules team to hear about the top court rules changes of 2023 that your firm needs to be aware of.

Presenter(s): Tony Gitelis, Dan Biegel, Miri Wakuta

[Virtual Only]

Track: Technical Admin

**Creating and Scheduling Jobs in Design Studio**

Explore Jobs in Design Studio and understand how to create, schedules, and monitor the jobs.

Presenter(s): Ryan Moffitt

[In-person & Virtual]

Track: Docketing

**Docketing Best Practices and Managerial Strategy**

A panel discussion with select docketing thought leaders on managing docketers, operational processes, and creating policies and workflows to protect your firm from risk while maximizing efficiencies.

Presenter(s): Tony Gitelis, Dan Biegel

[Virtual Only]

Track: Think Tank

**Driving Adoption Through the Right Approach to Training & Change Management**

Rollout success starts long before go live day - in this session we'll discuss practical ways to pave a smooth path towards change at your organization as well as techniques to efficiently and effectively train your staff.

Presenter(s): Brenna Strickland

[In-person & Virtual]

Track: Information Access

**EA Pro+: Handshake & EA Pro Does More**

EA Pro provides users with a great starting point in Expert and removes much of the complexity of the Expert Model. This session shows you how to extend EA Pro when you ADD Handshake to the mix

Presenter(s): Derek Schutz

[In-person & Virtual]

Track: Technical Admin

**Effectively Managing Expert Upgrades**

Looking to find out how to better manage your Expert upgrades? We'll discuss the upgrade process and testing requirements for your firm, and tips to successfully complete an upgrade.

Presenter(s): Alex Compton, Tim Garner

[In-person & Virtual]

Track: Financial Management

**Electronic Payments in Expert AP**

This session will walk through Electronic Payments Setup from start to finish. This is a great session if you are implementing for the first time, looking to migrate from Classic, or if your firm already uses Expert AP electronic payments and you want to understand where all the touchpoints and setup pieces are.

Presenter(s): Carrie Winscott

[In-person & Virtual]

Track: Explore Aderant

**Empowering Collectors: Expert Collections**

Learn how this module can empower your firm to better manage receivables whether you have a collections department or each partner manages their own clients. Expert Collections offers automated to-do lists, proactive alerts, embedded workflows, convenient document preparation, and more.

Presenter(s): Karen Bailey

[In-person & Virtual]

Track: Billing

**Everything you Need to Know About Expert Rates**

Ready to learn more about Expert's Rate Hierarchy? Gain a detailed overview of the functionality and general use of the Expert Rates Management module as we highlight the flexibility of the fee rate structures. This session will provide a better understanding of rate valuation along with tips to get the most value out of the application.

Presenter(s): Matt Bucks, Jesse Bressler

[In-person & Virtual]

Track: Financial Management

**Expert AP - Migrating from Classic AP**

Are you looking to move from Classic to Expert Accounts Payable? Find out what is involved with the transition, and best practice advice on implementation, training and rollout.

Presenter(s): Tonia Johnson

[In-person & Virtual]

Track: Financial Management

**Expert AP OCR**

Learn how to streamline and simplify your accounts payable data entry of vendor invoices_ with Expert's Accounts Payable OCR capabilities.

Presenter(s): Austin Brick

[In-person & Virtual]

Track: Explore Aderant

**Expert AP: It Starts with the A!**

This session will explore the Expert Accounts Payable module. We'll discuss automation techniques, configurable workflows, payment options, and even OCR capabilities.

Presenter(s): Austin Sanak

[In-person & Virtual]

Track: Billing

**Expert Billing Tips & Tricks**

Already an Expert Billing user? Attend this session to learn more about its features and hidden gems. See how you can improve billing cycles and increase team efficiencies utilizing Expert Billing.

Presenter(s): Jennifer Arendt, Rick Jensen

[In-person & Virtual]

Track: Explore Aderant

**Expert Billing: AFAs, Approvals, Alerts and more!**

This session is a high level tour of billing in Expert. This introductory session will explore the processes, capabilities, and benefits within the billing module.

Presenter(s): Austin Sanak

[In-person & Virtual]

Track: Explore Aderant

**Expert Case: Improved Collaboration Between the Front & Back Office**

Explore Expert Case, a solution that allows for easy collaboration between front and back office users. Expert Case provides a centralized workspace where users can access both pertinent case and matter related information as well as the corresponding financial data, all within efficient, user friendly dashboards. Additionally, learn about the multiple automation options in Expert Case, and increase efficiencies across the firm with our document assembly and Task flow task automation.

Presenter(s): Michael Clavell

[In-person & Virtual]

Track: Financial Management

**Expert Imaging Tips & Tricks + What's Coming Next**

We love having images at our fingertips in our Expert applications when we need them. Learn more about the modules available, helpful tips and troubleshooting tricks, and information about the new 2022.01 release.

Presenter(s): Martha Lorenz, Tonia Johnson

[In-person & Virtual]

Track: Time & Expenses

**Expert Time: What's New Since Version 8.2.2**

Let's take a look at all the new features that have been made available throughout 8.2.2 in Expert Time and OTG Time. We'll review usability improvements, including visual improvements when a user is offline, new Go to Exact Date action, and more.

Presenter(s): Wendie Willner

[In-person & Virtual]

Track: General Session

**General Session Day One**

Along with members of Aderant leadership, CEO Chris Cartrett will take the stage to talk through the year's previous achievements, investments, and developments and paint a vision for what the future looks like with Aderant.

Presenter(s): Chris Cartrett

[In-person & Virtual]

Track: General Session

**General Session Day One - Part Two**

Aderant product leaders Andy Hoyt (CTO) and Doug Matthews (CPO) will dive into all things tech and the product future for the Aderant family of solutions.

Presenter(s): Andy Hoyt, Doug Matthews

[In-person & Virtual]

Track: General Session

**General Session Day Two - Momentum Talks!**

Momentum Talks! is back! Aderant COO Rafi Shure will moderate three sessions on topics ranging from Aderant Support and Services, the new vi by Aderant product line and how we're tackling the billing compliance challenge.

Presenter(s): Rafi Shure

[In-person & Virtual]

Track: Financial Management

**GL Bank Reconciliation**

Speed up the reconciliation process with imported bank transactions, intuitive searching, and automated matching. This session will provide an overview of Expert General Ledger Bank Reconciliation and show you ways to improve the efficiency of your firm's cash management.

Presenter(s): Michael Clavell

[In-person & Virtual]

Track: Billing

**Hear from Early Adopters of BillBlast's New Matter Reconciliation Module**

Join us to hear from some of the Early Adopters of the new BillBlast Matter Reconciliation Module. Two firms will join us to talk about their early experiences with automating the process of reconciling vendor matter data with the law firm's matter.

Presenter(s): Candy Sharpe

[In-person & Virtual]

Track: People Management

**How to Develop and Retain Attorneys with the Right Work Opportunities and Feedback**

In this session, we will discuss the role that work opportunities and feedback play in the development and retention of attorneys. We will provide practical tips for creating a work environment that supports the growth and well-being of your team. Whether you are a law firm leader, a practice manager, or a HR professional, this session will provide valuable insights and strategies for fostering a culture of professional development and retention within your firm.

Presenter(s): Andrew Talpash

[Virtual Only]

Track: People Management

**How to Foster Attorney Engagement and Belonging in a Hybrid Work Environment**

Learn insights and strategies for overcoming the challenges of sustaining attorney engagement and belonging during hybrid work. From day one when attorneys are hired, it is essential that your firm has an integration plan that can help attorneys thrive and feel welcome. After the initial integration phase, regular check-ins with partners can provide feedback, coaching and recognition for attorneys and help them build meaningful and lasting working relationships. Gain practical tips for integrating your attorneys successfully and cultivating lasting connections in an inspiring work environment.

Presenter(s): Kathleen Nichols

[Virtual Only]

Track: Explore Aderant

**Information at Your Fingertips with Handshake, Drive and EA Pro+**

Attend this session to learn how Handshake, Drive and EA Pro+ fosters information sharing, collaboration, client relationships, client satisfaction, and ultimately retention. Handshake combines information from 40+ different systems into easy-to-manage firm dashboards, promoting agile searching and internal collaboration. Discover how Drive creates scalable collaboration sites while providing a secure way to share case and financial data with your firm's clients.

Presenter(s): Derek Schutz

[In-person & Virtual]

Track: Explore Aderant

**Insights About Your Firm Revealed by Benchmarking for BillBlast**

Explore how Aderant's first Benchmarking offering can drive performance improvement for your firm. Understand your scorecard, identify areas of potential improvement, track your improvement effort progress, and more. Don't rely on anecdotes; leverage powerful data to inform your views and understand your firm's performance relative to peers.

Presenter(s): Lauren Rice

[In-person & Virtual]

Track: Think Tank

**Life in the Trenches of the InfoSec Function**

In this presentation, we will share with you some useful tips and lessons learned throughout various different information security-related experiences. From building a successful training and awareness program to responding to security incidents, this informative session will provide attendees with real-world guidance on how the implementation of a structured and ever-evolving security program contributes to overall organizational success and client confidence.

Presenter(s): Jessica Mifflin

[In-person & Virtual]

Track: Matter Compliance/Management

**Manage Matters Seamlessly Between the Front and Back Office With Our New Matter Management Solution**

Come see and learn about our new matter management solution. This solution provides a home for your front and back office staff to easily enter, track, and share important matter details in one easy-to-access location. Additionally, your users can track and complete assigned tasks, record communications, create matter-related documents, link to inquiries, manage contacts, and launch new task flows.  Come and see how you can improve your collaboration and your client's overall experience with your firm.

Presenter(s): Ian Emery, Michael Clavell

[In-person & Virtual]

Track: People Management

**Mastering viEval: Walkthrough of Key Features & Client Use Cases**

In this session, we will provide a comprehensive training on how to use our performance evaluation software, viEval, like a pro. We'll walk you through the key features of viEval, and show you how other law firms are using it to save time and effort, and improve their performance evaluation processes. You will learn how to set up and use viEval for maximum impact, and how to integrate it into your existing workflow.

Presenter(s): Ashley Chou

[Virtual Only]

Track: People Management

**Maximizing Attorney Development with viRTF: Set Up Real-Time Feedback Processes**

Feeling like your feedback process for attorneys could be better? Learn how to set up effective real-time feedback for attorneys using our software, viRTF. We will discuss common workflows used by law firms to facilitate matter-based feedback, and how firms are using this feedback to enhance their annual performance reviews. We will also provide some best practices in training attorneys to give and receive feedback.

Presenter(s): Gray Kim

[Virtual Only]

Track: Explore Aderant

**Meet vi by Aderant!**

Discover the world of difference vi by Aderant is making with applicant tracking, tactical onboarding, performance evaluation, real-time feedback, resource allocation, CLE tracking, and skills management software.

Presenter(s): Andrew Talpash

[In-person & Virtual]

Track: Explore Aderant

**Milana: The Next-Generation Cloud Docketing Solution**

Bringing the best of CompuLaw and American LegalNet (ALN) together, Aderant's new solution, Milana, is driving continuous innovation in the docketing space. Examine how Milana boosts efficiency and provides protection from malpractice risk by automating and streamlining key processes, bringing a modern experience to law firms.

Presenter(s): David Flynn

[In-person & Virtual]

Track: People Management

**Operating in an Uncertain Economy: Why Your Firm Needs Better Resource Management, and How To Do It**

Operating in an uncertain economy can be challenging for law firms, especially when it comes to resource management. Without a proper process in place, it can be difficult to predict workloads and ensure that your attorneys are not burned out or underutilized. In this session, we will discuss the common challenges in resource management at law firms, and provide practical tips and strategies that can help you make better decisions about your firm's staffing and resources.

Presenter(s): Andrew Talpash

[Virtual Only]

Track: Information Access

**Overview of Handshake & Drive**

Handshake is one of the most exciting products in the Aderant portfolio. This session will provide an overview of the past, present, and future plans including Handshake Portals, Aderant Drive, and EA Pro+.

Presenter(s): Colin McManamon, Derek Schutz

[In-person & Virtual]

Track: People Management

**Overview of The vi People Management Platform - What's New and What's Coming**

The vi platform addresses the entire people management lifecycle for law firms - from recruiting and onboarding to strategic resource allocation and ongoing learning and performance management. Join this session to learn about our vision, our technology, and our latest innovations empowering law firms with a more intelligent approach to people management. Plus, you'll get a preview of what's coming in the future.

Presenter(s): Sukal Mondal

[Virtual Only]

Track: Explore Aderant

**Simplicity & Compliance with iTimekeep, OCG Live, and Thrive**

Attend this session to learn how iTimekeep provides one, unified timekeeping experience to assist in ensuring compliance, improved revenue, and more accurate timekeeping. In addition to iTimekeep's simplicity and user experience, learn how Aderant can help you enforce compliance at the point of time entry while Thrive assists in monitoring and enforcing your timekeeping policies.

Presenter(s): Austin Brick

[In-person & Virtual]

Track: Time & Expenses

**Simplify Compliant Time Entry**

Discover why iTimekeep is ranked as the #1 mobile time entry tool for law firms, year after year. Attendees will learn how iTimekeep guides users to compliant time entry, saving their firm's bottom line from write-offs and appeals!

Presenter(s): Austin Schupple, Katie Willis

[In-person & Virtual]

Track: Billing

**Split Billing in BillBlast (eBill, Email, Paper Billing)**

A deep dive discussion on split billing and how you are able to manage each payor's information within BillBlast. We will discuss expected data being managed in the financial system vs. data that can be managed in BillBlast and provide best practices for both.

Presenter(s): Rebecca Girty, Meg Anker

[In-person & Virtual]

Track: Technical Admin

**SQL Server Performance**

Insights into SQL Server performance, including examples of Expert support for creating and maintaining filegroups.

Presenter(s): Alex Compton, Tim Garner

[In-person & Virtual]

Track: People Management

**Staffing Attorneys on Matters: How to Ensure Profitability While Keeping Clients and Your Team Happy**

Staffing attorneys on matters can be a delicate balancing act, especially when it comes to ensuring profitability while keeping clients and team members happy. In this session, we'll cover the challenges and opportunities of properly staffing attorneys on matters, and provide practical tips and strategies for achieving the best possible outcomes.

Presenter(s): Rick Rawls, Andrew Talpash

[Virtual Only]

Track: Billing

**Streamline Email Invoice Delivery and Tracking with the BillBlast Email Module**

Do you email your invoices to your client for payment? Are you looking for ways to streamline delivery, track the status, identify bouncebacks quickly to resolve problems, or easily refer back to the original sent item to substantiate client requests? Are you looking for a way to follow up with clients on outstanding invoices? Do you have attorneys who still expect to send them themselves? Join us in a discussion that will show you how BillBlast's Email Module can help you with all these questions and more.

Presenter(s): Meg Anker

[In-person & Virtual]

Track: People Management

**The Benefits of Moving Your vi Modules to the Cloud, and How Our Team Can Help You Make This Move**

Join us in this session to learn about the advantages of a cloud migration for vi clients, including improved performance, scalability, and security. We will also provide an overview of our implementation process, and show you how other firms have successfully migrated their vi modules to the cloud. Don't miss this session to learn how you can maximize your vi investment and enhance your team's capabilities with cloud migration.

Presenter(s): Niveta Chowdhry

[Virtual Only]

Track: Docketing

**The Future of the Docketing Profession**

A panel discussion with select docketing thought leaders on the intersection of technology and docketing, and what the future holds for the profession as a whole.

Presenter(s): Guest Speaker, Tony Gitelis, Dan Biegel

[Virtual Only]

Track: Think Tank

**The Sierra Lift & Shift Experience**

What can you expect as you start your Life & Shift journey from Expert to Expert Sierra? This session will provide a review of the process and project to help make your transition smooth.

Presenter(s): Gail Cardner

[In-person & Virtual]

Track: People Management

**Three Ways to Utilize Your LMS for Attorney Learning and Development**

By taking the plunge and implementing a Learning Management System, law firms can open up new doors of opportunity for their attorneys. Make use of this powerful tool for training, development, and peer learning at your firm, and learn how you can leverage these advantages to overcome any hurdles that may arise, helping all attorneys to reach their full potential!

Presenter(s): Angel Duncan, Kathleen Nichols

[Virtual Only]

Track: People Management

**Unleash the Power of viRecruit: Walkthrough of Key Featurs & Client Use Cases**

Get ready to unleash the full potential of viRecruit with our training on how to get the most out of its robust features. We will also showcase the latest updates and features in the Wave version, and demonstrate how other law firms are using viRecruit to streamline their processes, save time and effort, and improve their recruitment outcomes.

Presenter(s): Nirmeen Khalid

[Virtual Only]

Track: Docketing

**Unleash the Power of Your Docketing Data**

Learn how to leverage your docketing data for management, audit, business development, and more.  This special presentation featuring Michael Nega will show you how to identify areas of risk, find data anomalies, and expose quality gaps to drive better outcomes around the function of docketing.

Presenter(s): Guest Speaker, Tony Gitelis, Dan Biegel

[Virtual Only]

Track: Think Tank

**Upgrade Experience in Expert Sierra**

This session offers a detailed review of the process for completing upgrades in an Expert Sierra deployment.

Presenter(s): George Hernandez

[In-person & Virtual]

Track: Technical Admin

**Using the Query Service Programmatically**

Understanding the Expert Query Service and how to effectively use it for custom integrations

Presenter(s): Ryan Russo, Ryan Moffitt

[In-person & Virtual]

Track: People Management

**viLMS + CLE Training: Best Practices and CLE Rules Updates**

Learn how to get the most out of viLMS + CLE with our training on the software's most commonly used features. We will cover how law firms use the software for improved collaboration, learning, and growth for attorneys and staff. Plus, we'll provide updates on the latest CLE rules and requirements, and how to ensure compliance with these rules using viLMS.

Presenter(s): Angel Duncan, Kiho Yi

[Virtual Only]

Track: Explore Aderant

**What does Expert do for me, the Attorney/Fee Earner Experience**

Take a closer look at the typical activities an attorney would complete through their day - from dashboard reviews, WIP management, and general inquiries, to time recording, expense capture and billing. We will show how this can be done in the office or on the go with tips along the way on how to maintain engagement from your users.

Presenter(s): Austin Brick, Ian Emery

[In-person & Virtual]

Track: Information Access

**What's New in Reports and Inquiries**

Are you up to date on the latest reports and inquiries? In this session we'll review the recently released financial management reports for Inventory, Realizations, Profitability, and Financial Statements. We'll also explore the General Ledger inquiries for Expert Inquiries.

Presenter(s): Austin Sanak

[In-person & Virtual]

Track: Information Access

**What's What in Information Access**

This session will explore the different tools available to surface Expert & Sierra data; from core reporting and inquiry tools, to business intelligence and analysis, custom dashboards and integrations with other productivity tools.

Presenter(s): Rick Rawls

[In-person & Virtual]

Track: Think Tank

**Why Expert Billing? Manage the Classic to Expert Billing Transisiton Smoothly**

Wondering if you should take the time to move from Classic Billing to Expert Billing? Wondering how you'd go about doing it well? Join this discussion to hear proven benefits and tips for a smooth rollout from our experts at Aderant.

Presenter(s): Harvey Cohen, Ian Emery

[In-person & Virtual]

*Momentum 2023 Session Schedule is subject to change.